Volunteer Management in These Times

Center on Budget & Policy Priorities

October 4, 2017

Virtual Training Series

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Volunteer Maryland
Virtual Training Series

• Features the expertise of campaign partners in the field

• Focuses on specific outreach strategies and skills that you can begin to apply to your work immediately
Volunteer Maryland builds stronger, healthier communities by developing volunteer programs with nonprofit organizations, government agencies, and schools. The program’s vision is that all Marylanders will participate in and value service as a way of life to enrich and empower community, society, and self.
Multiplier Model

Volunteer Maryland! 4 State Staff

32 AmeriCorps Members
30 Volunteer Coordinators
2 Peer Leaders

Service Sites 30 Non-profit, Government Agencies addressing education, environment, human needs and veteran services

Volunteers 8,057 Community volunteers recruited and managed

Serving Clients and Communities 22,502 Maryland citizens served by volunteers recruited and managed by VM AmeriCorps Members
JUST HARVEST FREE TAX PREP
= $$$ IN YOUR POCKET

105 volunteers
2,586 households helped
$5.19 million in refunds

Figures derived from all four Just Harvest tax sites for tax season 2014 as of Apr. 15

United Way
MONEY IN YOUR POCKET COALITION
Today we are going to focus on volunteers

105 volunteers
2,586 households helped
$5.19 million in refunds
- Recruiting after a challenging year
- Dealing with Change
- Mindset
- Start with the Why
- Tax Preparation made SEXY!
• **TaxSlayer**
  – New software
  – Redevelop materials
  – Calculation errors
  – Software not reliable
  – Change in format
• **Volunteers**
  – *Learn new software*
  – *Tax returns took longer due to new format*
  – *Increase in self employment income due to increase in Uber and LYFT drivers*
  – *Advanced training required*
• **Volunteers**
  – Learn new software
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• Jonathan Haidt, The Happiness Hypothesis.
  – Rider
  – Elephant
  – Path
Rider = Reason

Elephant = Emotion

Path = Environment/habit
• Direct the Rider
• Motivate the Elephant
• Shape the Path
How can we deal with malnutrition in Vietnam?

Jerry Sternin – Save the Children; 1990
Direct the Rider

• Data:
  – Poor Sanitation
  – Poverty
  – Limited access to clean water
• Bright Spots:
  – Sweet potato leaves
  – Shrimp & crab
  – 4 small meals a day
  – Hand fed
Direct the Rider

- Jerry Sternin –
  - Motivated the elephant
  - Directed the rider
  - Shaped the path
Rider = Reason

Elephant = Emotion

Path = Environment/habit
Motivate the Elephant
Motivate the Elephant
Motivate the Elephant
Motivate the Elephant

- Lack of motivation
- Resistance Fatigue
- Impossible Outcome
Rider = Reason

Elephant = Emotion

Path = Environment/habit
Rider = flee with ambiguity

Elephant = wander if path/motivation is not clear

Path = Clear remove obstacles
• **Obstacles** -
  – No need for change
  – Never done it like this before
  – It will never work
  – It is just too much
• 2nd model for addressing change
• Ascent, Juan Riboldi
• The Five Widening Gaps
  – Five barriers to implementing successful change
The Five Widening Gaps

- Low Trust
- Lack of Focus
- Poor Capability
- Weak Commitment
- Delayed Results
Take Away

• Identify the biggest challenge facing volunteer program?
• What “bright spots” can you highlight within this challenge?
• Who are your allies? How can you engage them?
• Can you identify small changes that will not overwhelm the rider? What are they?
Mindset

- Carol Dweck -
Mindset

Answer these questions about intelligence. Decide whether you mostly agree or disagree with it.
Mindset

- Questions 1 & 3 are the fixed-mindset questions.
- Questions 2 & 4 reflect the growth mindset.
**GROWTH MINDSET**

"Failure is an opportunity to grow"

"I can learn to do anything I want"

"Challenges help me to grow"

"My effort and attitude determine my abilities"

"Feedback is constructive"

"I am inspired by the success of others"

"I like to try new things"

**FIXED MINDSET**

"Failure is the limit of my abilities"

"I'm either good at it or I'm not"

"My abilities are unchanging"

"I don't like to be challenged"

"I can either do it, or I can't"

"My potential is predetermined"

"When I'm frustrated, I give up"

"Feedback and criticism are personal"

"I stick to what I know"
Mindset

- **TaxWise**
  - Familiar
  - Replicated tax forms
  - Auto fill
  - Easy to flip back to review work

- **TaxSlayer**
  - New software
  - Redevelop materials
  - Calculation errors
  - Software not reliable
  - Change in format
Mindset
Start with your Organizational Why
Start with your Organizational Why

Rider = rational

Path = processes

Elephant = emotional/social change
Start with your Organizational Why
Long Term Volunteers

- Long term Volunteers
- Training
- Not Ideal -
  - Many volunteers never see their cases close.
Long Term Volunteers Intensive Training

- Intensive Training
- Certification required
- Not Ideal -
  - Clients don’t show up
  - Free space is limited
Make tax preparation SEXY!

Boy, you “accidentally” add a couple extra zeros on the refund line, and they act like it’s a federal offense!
Make tax preparation SEXY!

- **Play on TaxSlayer name...**
  - Ninja
  - Wolverine
- **Lead Volunteers ...**
  - A numbers game
  - Mentors
DO WHAT YOU CAN, WITH WHAT YOU HAVE, WHERE YOU ARE

Theodore Roosevelt

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