

# **C.E.O. Women's Volunteer Handbook**

**A Guide to Managing Volunteers and the  
Volunteer Program**

*C.E.O.  
Women*

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*Creating Economic  
Opportunities  
For Women*

**November, 2011**

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## **Overview of Volunteer Program**

C.E.O. Women's volunteer program has always been a critical component of our ability to provide essential services to our clients. In 2011, C.E.O. Women invested in developing a framework for a volunteer program to better support volunteers while increasing organizational capacity.

### **Structure of the volunteer program**

Volunteers support C.E.O. Women programs and operations in a variety of different ways which fall into four broad categories:

1. Sharing business expertise
2. Spreading the word about our programs
3. Supporting events
4. Supporting operations

Most of our volunteer positions are related to our organizational calendar. For more information about specific positions and timelines, see the calendar of volunteer opportunities.

### **Demographics of our volunteers**

- CEOW works with 150-200 volunteers in one year
- As a generalization, our volunteers are mid-level professional women
- Our volunteers tend to be immigrants themselves or children of immigrants
- In general, volunteers are eager to work with clients
- Historically, most of our volunteers have completed their one project and then moved on from the organization.
- Currently, 16% of our volunteers are CEOW donors

### **State of the volunteer program**

Prior to 2011, there was a high level of volunteer turnover because the organization had a piecemeal approach to volunteerism. This approach also led volunteers to develop relationships with their managers but not the organization as a whole.

C.E.O. Women's volunteer program has evolved over the past year into a structured program through which we have begun to engage volunteers on a consistent basis and deepen their connections with our work.

We started 2011 by focusing on recruiting new volunteers into the program and then shifted our focus to retaining our current volunteers, since we had already

invested in them. As a result, we have built a solid volunteer base of individuals who are actively engaging with the organization on a regular basis.

In 2011, we have seen a steady increase in the number of hours volunteered (up over 35% from 2010 so far) as well as a dramatic increase in the number of volunteers that we work with (an increase of 115%). We have also placed an emphasis on the number of volunteers who take on multiple projects, both over the course of the year and from year to year, which has resulted in having a more engaged and consistent community of volunteers.

### **What you will find in this handbook**

This handbook outlines the practices that C.E.O. Women has developed over the past year to manage the volunteer program. It contains recommended procedures to recruit, recognize and retain volunteers as well as samples and suggestions for communications, event timelines, presentation materials, etc. The handbook is intended to support staff who will manage volunteers and those who will manage the volunteer program itself.

## **Messaging for the Volunteer Program**

We want to maintain standardized messaging for the volunteer program in order to promote a more consistent experience for all of our volunteers. In addition, because we want to be consistent as an organization with our messaging, the information we communicate about the volunteer program also needs to fit into CEOW's overall messaging.

There are two different types of messaging related to volunteers: external messaging to volunteers and internal messaging for staff about volunteers. The following guide focuses on overall messaging for volunteers and the volunteer program.

### **External Messaging**

The external messaging consists of information that we share publicly about the volunteer program with both our volunteers and other stakeholders. It ranges from a broad perspective about the organization to focused messages about each specific component of the volunteer program.

#### **1. Overall message of the volunteer program**

CEOW is committed to providing a dynamic, rewarding environment where members of the community can share their skills and expertise while making a profound impact on the economic livelihoods of low income immigrant and refugee women.

#### **2. Overview of the program**

Approximately 150 volunteers contribute approximately 1400 hours of time to the organization on an annual basis. Our volunteers support all aspects of the organization and we encourage our volunteers to continue to innovate with us to improve our programs and operations. For more information, see the Overview of the Volunteer Program.

#### **3. Types of Volunteer Positions**

Volunteers support C.E.O. Women in the following 4 categories:

1. Sharing business expertise
2. Spreading the word about our programs
3. Supporting events
4. Supporting operations

A majority of our volunteer opportunities are not face-to-face opportunities to work with clients. Most volunteers want to work directly with clients,

regardless of whether or not they are well suited for those types of positions. It is important to communicate honestly what our needs are for volunteers so as to not set expectations that we cannot meet.

#### 4. Recruitment message to prospective volunteers

The volunteer recruitment message is shared on an ongoing basis and so it is important to maintain consistency, regardless of the volunteer position.

##### a. Overall recruitment message

In the recruitment process, it is essential to communicate that we are looking for specific individuals who are passionate about our mission and who have the skills to fill our volunteer needs. We will not work with anyone, but we will work with volunteers with all types of skills. We are looking for individuals who meet the following criteria:

##### i. They are passionate about our mission

This is key. Frequently, individuals contact CEOW about volunteering even though there is not an opportunity available immediately. Individuals who are passionate about our mission will continue to engage with the organization even if we cannot place them immediately.

##### ii. They are reliable individuals

##### iii. Their skills match our volunteering needs

##### b. Volunteer application

All prospective volunteers must fill out a volunteer application. This gives us essential contact information as well as background information and interests, which are important for efforts to engage individuals as volunteers

##### c. Calendar of volunteer positions

In the recruitment process, it is important to have knowledge about the open volunteer positions and when closed positions will open up again. If a prospective volunteer is a good fit for the organization, it is important to be able to share information about how they might fit into the volunteer program, even if they are not a good fit for current openings. For more information about the different types of positions and the times of year that we typically work with these volunteers, see the Calendar of Volunteer Opportunities.

## 5. Training message to prospective and active volunteers

For both our prospective and active volunteers, it is important to communicate that we will equip them with the tools and training they need to be successful. Similarly, we are willing to invest in our volunteers' personal development because it gives them "job satisfaction" and also makes them more capable volunteers.

## 6. Expectations we have for volunteers

Setting expectations for volunteers is essential for their success. This allows our volunteers to know if they are being successful, and creates accountability on their end. For each volunteer position there are specific expectations, which should be communicated in both the volunteer position description and the volunteer training. In general it is important to communicate the following expectations for all volunteers:

- a. We expect our volunteers to follow through with their commitments
- b. We expect our volunteers to track their hours
- c. We will provide support if needed
- d. If they are unable to fulfill their assigned duties, they can be dismissed from the position
- e. Volunteers should be honest about what an acceptable time commitment is
- f. We expect our volunteers to communicate with us regularly

This expectation is especially important. It encourages volunteers to communicate if they are unable to fulfill their commitments and allows CEOW to recruit new volunteers to replace them.

## 7. Where External Messaging Appears

Messaging for the volunteer program is present in many different places so it is important to maintain its consistency. Most regularly, we share information about the volunteer program in the following places/ways:

- a. Our website

Our website contains general information about the volunteer program, current volunteer opportunities, resources and a profile of a volunteer.

b. Monthly newsletter

Most often, we share information about volunteer opportunities and volunteer orientations in eNews.

c. Orientations

Volunteer orientations are opportunities to share information about the volunteer program in general as well as the expectations we have for volunteers.

d. Positions descriptions that are advertised (Volunteer Match and Idealist and the most regular posting locations)

These advertisements contain information about specific volunteer opportunities as well as general information about CEOW. These should follow the format of the volunteer position descriptions as explained in the Guide to Recruiting Volunteers.

e. Corporate presentations

Corporate presentations should include information similar to volunteer orientations, which give a general overview of CEOW as well as an overview of the volunteer program.

f. Volunteer one-pager (see sample below)

This is a brief overview of the volunteer program designed to share information with prospective volunteers. This document has been used at house parties and presentations about CEOW to corporations as a way to share one way individuals can get involved with CEOW.

### **Internal Messaging**

The internal messaging is information for staff who are managing volunteers as well as information about the volunteer program itself. Having consistent internal messaging enables CEOW to provide consistent experiences for all of our volunteers, regardless of who they work with.

1. Volunteer Program Mission

The mission is to increase the capacity of the organization through both time and money so that CEOW can reach more women and deliver our programs effectively. We have set goals that reflect this mission and there is more

information about those goals specifically in the Guide to Evaluating the Volunteer Program.

2. Responsibilities of the volunteer's manager (more information about how to do this can be found in each section's specific guide)

a. Recruiting your volunteer

Since the manager will be the individual who works directly with the volunteer, it is important that the manager engage in the recruitment process. If there is a volunteer coordinator, the volunteer coordinator will conduct outreach efforts to recruit volunteers and an initial screening. After that, the staff person should take over to ensure that they will be able to work well with the volunteer.

b. Training your volunteer

The staff person is responsible for training the volunteer both on their specific duties and CEOW messaging in general (which can be done relatively easily by sharing the communications cascade found here: \\Ceowserver2003\share\ORGANIZATION\MARKETING & COMMUNICATIONS\9-PLANS and CALENDARS\Communications Cascade and Messaging\ Communications Cascade 20110413 ML v8

c. Tracking your volunteer (see the Guide to Volunteer Tracking)

d. Evaluating your volunteer( see the Guide to Evaluating Volunteers)

e. Thanking your volunteer (see the Guide to Volunteer Recognition)

3. Communications from staff

When communicating with volunteers, it is important to be transparent with them and also empower them with information. As volunteers, they want to be included in the organization so sharing information and doing so in a timely manner is important. When communicating with volunteers, follow these basic principles:

a. Be honest

b. Be prompt in your communications. Respond to emails and phone calls by the next business day if possible.

c. Share information they need to know

d. Answer their questions



# Volunteering at C.E.O. Women

Make a difference in the lives of immigrant entrepreneurs! C.E.O. Women is a nonprofit organization that helps low-income immigrant and refugee women become entrepreneurs by teaching them a combination of English, communications, and entrepreneurship skills so they can establish successful livelihoods.

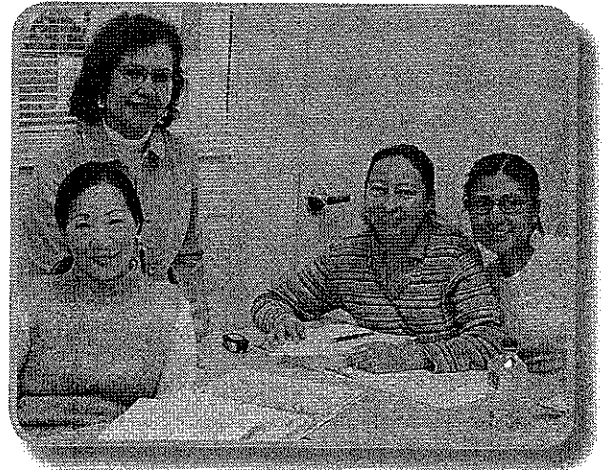
C.E.O. Women's volunteer program offers many unique opportunities throughout the year to get involved in Oakland, San Jose, and remotely. Our volunteers develop and hone professional skills while supporting remarkable women and strengthening Bay Area communities. Sample volunteer activities include:

## Share Your Business Expertise

- Serve as a one-on-one business coach with a client
- Be a guest speaker in the classroom
- Advise clients
- Present workshops

## Spread the Word About Our Programs

- Translate materials about our programs
- Reach out to prospective clients about upcoming classes
- Reach out to current clients about upcoming opportunities



## Support C.E.O. Women Events

- Take photographs of clients
- Help out at graduations or our annual Global Marketplace event
- Design graphics for C.E.O. Women collateral

## Support C.E.O. Women Operations

- Conduct research projects
- Assist with database management
- Fundraise for C.E.O. Women

To learn more about our current volunteer opportunities, email [volunteer@ceowomen.org](mailto:volunteer@ceowomen.org)  
To apply to become a volunteer, visit [www.ceowomen.org/helpout](http://www.ceowomen.org/helpout)



# Calendar of Volunteer Opportunities

Position	Responsibilities	Skills	Time commitment	Availability
Advisory Council Member	Support and provide expertise for development of CEOW vision; support fundraising efforts	Leadership experience; expertise in accounting, finance, fundraising, PR and/or marketing; access to a network of individuals	Open	Open
Annual Event Bartenders	Serve drinks to guests	Bartending experience	5 hours at the annual event	October
Annual Event Day-Of Volunteers	Set up and clean up event space; pass out pledge cards during fundraising ask; man registration table, greet and direct guests	NA	4 hours at the annual event	October
Annual Event Servers	Serve caterers' food; assist with food preparation	Serving experience	5 hours at the annual event	October
Board Member	Manage vision for CEOW; lead organization; support fundraising efforts	Leadership experience; expertise in accounting, finance, fundraising, PR and/or marketing; access to a network of individuals	Attend board meetings every other month; be available for consultations about CEOW	Open
Classroom Assistants	Provide logistical and one-on-one support in the classroom	Experience working with English learners	3 hours per week on a class night for 4 months	January-June, September - December
Client Business Directory Volunteer	Call clients to get business information; create a directory of client businesses, including photos and business information	Excellent communications skills, especially over the phone; graphic design experience	3-4 hours a week for one month	September
Client Interviewer	Interview clients about their backgrounds and businesses; compile notes from interview	Excellent communications skills, especially over the phone	1-2 hours a week	Open
Coaches	Provide one-on-one business mentorship to clients	Business acumen; flexible schedule; experience working with immigrants	3-4 hours per month for 3 months	January - April, July - September
Database Miner	Clean up or add data in eTapestry or VistaShare	Attention to detail; meticulous; database savvy	1-2 hours a week	Open
Development Council	Raise \$5,000 for the organization; help further awareness about CEOW; connect CEOW with corporate contacts	Access to a network of individuals; ability to meet on a quarterly basis	2 hours per quarter and attendance at quarterly meetings	Open
Evaluation Intern	Interview clients about their income, businesses, etc.; compile interview results	Excellent communications skills, especially over the phone, database savvy, experience conducting interviews	5-10 hours per week for 3 months	May-August
Event Host Committee	Invite individuals to annual event; raise funds for event	Access to a network of individuals	1 hour	July - October



Position	Responsibilities	Skills	Time commitment	Availability
Graduation Event Planner	Organize logistics; gather materials and donations for client graduations	Attention to detail; event planning experience, communications skills	1-2 hours a week for 3 months	April-June, October - December
Graphic Designer	Develop graphics for event invitations, postcards, save-the-dates, programs etc.	Graphic design	5 hours per project	February - August
Guest Speaker	Speak to current students about a particular business topic, or entrepreneurship in general	Business acumen in one specific area; experience presenting to English learners, experience as an entrepreneur	2 hours	March - June, October - December
House Party Host	Host a house party designed to introduce new individuals to CEOW	Access to a network of individuals, ability to host a party in home or other venue	1 hour a week for 5 weeks	Open
Outreach Materials Translator	Translate outreach brochures into needed languages	Fluency in Amharic, Arabic, Chinese, Farsi, Hmong, Khmer, Korean, Lao, Mien, Spanish, Tigrinya, or Vietnamese	3-5 hours per brochure	July, December
Phone Bankers	Call clients about upcoming workshops; call prospective clients about upcoming classes	Excellent communications skills, especially over the phone	2 hours per session	As needed
Photographers	Take pictures at CEOW events; do a photo shoot of clients (potentially at client businesses)	Photography	2-3 per event	Depends on event schedule
Press Researcher	Research reporters and media outlets to build the media contact list	Research savvy, critical thinking	1-2 hours a week	Open
Program Ambassador	Share information about CEOW's programs out in their community	Knowledge of local community; excellent verbal communications skills; experience working with immigrant communities	1-2 hours per week for 2 months	July-September, November - January
Social Media Strategy Team Volunteer	Support CEOW social media development (analyze insights, post regular items on FB and Twitter, etc)	Social media acumen	1 hour a week	Open
Storefront Event Attendees	Attend Storefront Presentations and speak with clients about their businesses	Excellent communications skills	1 hour per event	Storefront event night, 6:30-7:30pm in April, June, October or December
Storefront Prep Volunteer	Help clients prepare for Storefront presentations on the computer and with grammar	Experience in business in general; desired experience working with English learners	2 hours per session	The night before Storefronts in April, June, October or December
Volunteer Interviewer for Volunteers	Interview volunteers who are interested in supporting CEOW; compile notes about interviews; recommend individuals for volunteer positions	Excellent communications skills, especially over the phone; experience with hr or team development	4-6 hours a month	Open
Volunteer Orientation Speaker	Speak about experiences as a volunteer at volunteer orientations; answer questions prospective volunteers have	Excellent public speaking skills	1 hour per orientation	January, May, August, October



Position	Responsibilities	Skills	Time commitment	Availability
Workshop Assistant	Assist with workshop logistics on the day-of; provide one-on-one support to clients while working on exercises	NA	2 hours	Workshops occur in the evenings
Workshop Presenter	Speak to clients about a particular business topic	Business acumen in one specific area; experience presenting to English learners	2 hours plus prep time	Workshops occur in the evenings
Business Expert Fair Volunteers*	Provide one-on-one business consulting at the business expert fair (like speed dating)	Business acumen; experience working with immigrants	2 hours per session	At scheduled business fairs
ESL Mentor**	Provide one-on-one ESL mentoring to clients	Experience working with English learners	TBD	TBD
In-kind Donation Researcher/Solicitor**	Research in-kind donors; solicit in-kind donations	Excellent research and communications skills; excellent with follow up	1-2 hours per week	Open
Outreach Assistant**	Research organizations, institutions and media outlets in the Bay Area; create profiles of organizations	Excellent research skills; knowledge of Bay Area organizations a plus	2-3 hours per week	Open
Office Greening Assistant**	Scan paper documents; categorize scanned files on the server	Excellent attention to detail; administrative experience	1-2 hours per week	Open
Video Producer**	Create videos of client stories	Experience creating high quality videos; film equipment necessary	10-20 hours per video	Open
Volunteer Newsletter Producer**	Write and send volunteer newsletter	Knowledge of eTapestry; excellent written communications skills; graphic design experience a plus	10 hours per newsletter	January, July

\* We have not worked with these volunteers in the past year

\*\* We have not worked with these volunteers in the past



## **Guide to Recruiting Volunteers**

Volunteer recruitment is the first step in the volunteer process. It engages individuals with the organization as a first step to getting them involved. Recruitment also provides the opportunity to engage Active volunteers with new projects (for more information, see the Guide to Re-engaging Volunteers). The following is a guide to the volunteer recruitment process.

### **1. Creating a position description**

Before beginning to recruit volunteers, it is essential to create a clear position description. Position descriptions must include:

- a. The title of the position
- b. The department
- c. The volunteer's supervisor
- d. The location of service
- e. The duties of the volunteer
- f. The time commitment
- g. The qualifications/requirements for the position
- h. The training provided
- i. The benefits
- j. How to apply

### **2. Creating a supervision plan**

A supervision plan should outline what the volunteer's supervisor, or volunteer position lead (VPL), will do to train and manage the volunteer, based on the duties listed in the position description. It should include:

- a. The position
- b. The department
- c. The supervisor

d. The supervisor's responsibilities:

- i. Screening the candidates
- ii. Any necessary training for the volunteer
- iii. Preparation of the volunteer project (for example pulling lists of clients for the volunteer to call for a phone banking position)
- iv. Thanking the volunteer
- v. Any follow-through required after the completion of the volunteer project

3. Job posting

The job posting should be approved by another member of your team and then posted by the VPL. The posting is normally published on:

- a. C.E.O. Women website under "Internships/Volunteer Opportunities" (dynamic content in Jobs/Unpaid)
- b. Volunteermatch.org
- c. Newsletter blurb in monthly eNews (if there is a volunteer newsletter going out, then the blurb should be substituted there instead of eNews)
- d. Post the opportunity to Facebook
- e. Post the opportunity on Twitter
- f. Email any relevant volunteer recruitment partners (for graphic designers for example, the VPL should email local art schools)

4. Application

Anyone interested in the position, who has not already volunteered with CEOW, should fill out the C.E.O. Women online volunteer form ([http://www.ceowomen.org/index.php?option=com\\_content&task=view&id=54&Itemid=148](http://www.ceowomen.org/index.php?option=com_content&task=view&id=54&Itemid=148) and sample included below), no matter where they heard about the position. If the applicant seems like he/she could be a good fit, the VPL should schedule a phone screening.

5. Phone screening questions

Before conducting a phone screening, the VPL should develop a set of questions relevant to the position to be used in the phone screenings. For recommendations, see the sample questions in the Appendix.

## 6. Phone screenings

Generally take about 15-30 minutes. They should be conducted by the VPL. Phone screenings should include:

- a. An explanation of the purpose of the interview
- b. An overview of organization and how the position fits in
- c. Questions to learn about the volunteer's background
- d. Questions relevant to the position
- e. Responses to volunteer's questions

Notes from individual phone screenings should be saved here:  
\\Ceowserver2003\share\ORGANIZATION\VOLUNTEERS\2-  
Recruiting\Screening\Individual phone screenings

Resumes and references for volunteers should be saved here:  
\\Ceowserver2003\share\ORGANIZATION\VOLUNTEERS\2-  
Recruiting\Resumes and References

For phone screenings for coaches, refer to the coaching binder.

## 7. Timeline

The volunteer position should be posted one month before volunteers will begin working on their project. Coaches are the exception to this rule – see the Women Connected binder section on coaching for recruitment information specific to coaching.

## 8. Templates and samples

- a. Position descriptions
- b. Email to potential volunteers
- c. Generic phone screening script
- d. Phone screening questions

## e. Newsletter templates

[VOLUNTEER OPPORTUNITY TEMPLATE]

**Position:**  
**Department:**  
**Supervisor:**  
**Location:**

**Goal of the position:**  
Insert goal of the position here

**Duties:**  
• Insert duties here

**Time commitment:**  
• Insert time commitment here

**Qualifications/requirements:**  
• Insert requirements here  
• Meticulous attention to detail  
• Excellent communication skills

**Training provided:**  
• Basic orientation to C.E.O. Women  
• Insert additional training here

**Benefits:**  
• Insert specific benefits here  
• Experience in a cutting edge nonprofit  
• Networking opportunities with other volunteers and professionals  
• Service to inspiring entrepreneurs

**To apply:**  
• Fill out the volunteer form at: <http://www.ceowomen.org/helpout>  
• Note any additional steps here

[SAMPLE VOLUNTEER OPPORTUNITY]

**Position:** Client Interviewer

**Department:** Development

**Supervisor:** Resource and Development Associate

**Location:** Oakland office, with the possibility to work off-site

**Goal of the position:**

C.E.O. Women regularly interviews our clients about their background and businesses to share with our stakeholders. The Client Interviewer position will conduct interviews with clients to collect that information and then share their interview notes with the Resource and Development Associate.

**Duties:**

- Schedule interviews with clients
- Interview clients about their background and business idea
- Document interview

**Time commitment:**

- 1-2 hours per week for 2 months, minimum
- Available between 9am and 5pm during the workweek
- Position begins in April

**Qualifications/requirements:**

- Excellent phone manner
- Ability to follow instructions precisely
- Comfortable speaking with people over the phone

**Training provided:**

- Basic orientation to C.E.O. Women
- Training on speaking with English learners and the interview process

**Benefits:**

- Meeting inspiring entrepreneurs
- Experience in a cutting edge non-profit
- Networking opportunities with other volunteers and professionals
- Involvement with and service to the local growing business community

**To apply:**

- Fill out the volunteer form at: <http://www.ceowomen.org/helpout>
- Submit your resume to [mikaela@ceowomen.org](mailto:mikaela@ceowomen.org)

[SAMPLE VOLUNTEER SUPERVISION PLAN]

**Position:** Client interviewer

**Department:** Development

**Supervisor:** Resource and Development Associate

Supervisor is responsible for:

1. Screening volunteer candidates
2. Training the volunteer on speaking with English learners
3. Training the volunteer on interview procedures
4. Identifying clients to interview
5. Providing the volunteer with the clients contact information
6. Checking in with the volunteer about conducting interviews on a bi-weekly basis
7. Reminding the volunteer to track their hours in the Google spreadsheet
8. Collecting interview transcripts
9. Thanking the volunteer for their work as they complete it
10. Sending the volunteer the articles/profiles that are written as a result of their efforts

[TEMPLATE EMAIL TO PROSPECTIVE VOLUNTEERS]

Hi NAME,

Thank you for contacting C.E.O. Women, and for your interest in volunteering with our organization. Can I schedule a brief phone call with you so I can tell you more about our programs and services, and hear more about how you might like to get involved? Let me know if you are available INSERT A FEW DATES AND TIMES YOU ARE AVAILABLE.

I look forward to speaking with you soon!

Regards,  
YOUR NAME



Creating Economic Opportunities For Women

# Volunteer Application

C.E.O. Women is committed to providing a dynamic, rewarding environment where members of the community can share their skills and expertise, and make a profound impact on the economic livelihoods of low income immigrant and refugee women. We want to learn how your skills, experience, or connections can help C.E.O. Women change the lives of low income immigrant and refugee women in the greater Bay Area and beyond.

Please complete the application below to help us match your skills and interests with our current openings.

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
Street Address

City \_\_\_\_\_ State/Province/Region \_\_\_\_\_ Postal/Zip Code \_\_\_\_\_ Country \_\_\_\_\_

Email: \_\_\_\_\_

Phone Number: \_\_\_\_\_

Have you volunteered with C.E.O. Women before?

- Yes
- No

How did you hear about us?

- Idealist
- Volunteer Match
- Our website
- Word of mouth
- Email

Other: \_\_\_\_\_

Where do you prefer to volunteer?

- Oakland
- San Jose
- Remotely

Other: \_\_\_\_\_

Why are you interested in becoming a volunteer with C.E.O. Women?



Creating Economic  
Opportunities  
For Women

I want to volunteer in the following areas. Select all that apply.

- Assisting in the classroom
- Assisting with database management (donor database: eTapestry; client database: VistaShare)
- Assisting with our marketing and communications efforts
- Assisting with volunteer coordination
- Business coaching
- Designing graphics for C.E.O. Women collateral
- Filming client stories
- Fundraising: soliciting corporate support and/or conducting prospect research
- Guest speaking on: Marketing; Accounting and Finance; Legal; Operations; Technology
- Planning events
- Reaching out to clients and prospective clients about our programs
- Taking pictures of our clients and at events
- Using your networks to spread the word about C.E.O. Women
- Web programming

If your areas of interest are not listed above, please list any special skills you would like to contribute or develop in your volunteer position.

In general, what days of the week are you available to volunteer?

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday
- Sunday

In general, what times of day are you available to volunteer?

- Mornings (8 AM – 12 PM)
- Afternoons (12 PM – 4PM)
- Evenings (4 PM – 8 PM)

Please list any languages besides English in which you are fluent.

Please submit your resume along with your application.



## [GENERIC PHONE SCREENING SCRIPT]

### **Intro**

Thank you so much for your interest in volunteering with C.E.O. Women. I hope that during our call today I can tell you more about our programs, answer questions you may have, and ask you some questions about how you might like to get involved. The goal of this phone call is to find out if there is going to be a good fit between what you are looking for and what we need.

### **Intro to C.E.O. Women (as necessary)**

C.E.O. Women is a non-profit organization that helps low-income immigrant and refugee women to become entrepreneurs by teaching English, communications and entrepreneurship skills. We have served women from over 45 different countries to date. We have three branches of our training program: our training program, our alumnae support services and access to capital.

Our first program area is our business training program, which is split into two courses. We have an introductory course that focuses on finance in the United States. In that course, our clients learn about credit and banking in the US and do a personal budgeting exercise. After they complete that course, they move onto our core course, which covers how to run a small business, focusing on budgeting, business financials, credit, marketing, and customer service.

The second branch of our program consists of our ongoing support services. After women graduate from our training course, we offer them continuous support as they move forward with their businesses. We do this in a variety of ways including hosting workshops on a variety of topics (ranging from business taxes to time management to getting your business online), a business mentorship program (where we pair clients and mentors and they work together one-on-one for a three month period on their specific business goals) and small business advising services.

The third branch of our programs is our access to capital program. We work with partner organizations to connect our graduates with matched-savings account programs and financial resources for their businesses. We have also launched a pilot lending circles program, where a group of women come together each month and pool their money. One woman then takes the pot to pay for her expenses. This program is designed to help our clients leverage resources and build their credit scores, because the program is tied to a bank that monitors their payments.

*Do you have any questions about our programs?*

### **Screening Questions**

I'd like to ask you a few questions about your background and the volunteer position:

<i>Why are you interested in volunteering with C.E.O. Women? What motivates you to volunteer? (look for passion for C.E.O. Women mission, esp. building small business and working with immigrant/refugee women)</i>	Incompetent 0	Fairly Competent 1	Competent 2	Excellent 3
Notes:				

<i>What do you want to accomplish as a volunteer?</i>	Incompetent 0	Fairly Competent 1	Competent 2	Excellent 3
Notes:				
<i>What skills or abilities are you looking to use as a volunteer? What skills or abilities are you looking to gain as a volunteer?</i>	Incompetent 0	Fairly Competent 1	Competent 2	Excellent 3
Notes:				
<i>What are your expectations in volunteering with C.E.O. Women?</i>	Incompetent 0	Fairly Competent 1	Competent 2	Excellent 3
Notes:				
<i>Tell me about your work experience. Tell me about your current and past volunteer experiences.</i>	Incompetent 0	Fairly Competent 1	Competent 2	Excellent 3
Notes:				
<i>What other types of volunteer positions are you currently looking for? What types of organizations are you looking to volunteer with?</i>	Incompetent 0	Fairly Competent 1	Competent 2	Excellent 3
Notes:				
<i>Please describe any experience you have working with our target population (low-income, immigrant, ESL, women)</i>	Incompetent 0	Fairly Competent 1	Competent 2	Excellent 3
Notes:				
<i>Describe one project or activity for which you had total responsibility.</i>	Incompetent 0	Fairly Competent 1	Competent 2	Excellent 3

Notes:				
<i>How do you handle a situation that you are unable to complete an assignment or commitment?</i>	Incompetent 0	Fairly Competent 1	Competent 2	Excellent 3
Notes:				
<i>What is your availability? How many hours a week and what days of the week are best?</i>	Incompetent 0	Fairly Competent 1	Competent 2	Excellent 3
Notes:				
<i>Can I add you to our mailing list?</i>	Incompetent 0	Fairly Competent 1	Competent 2	Excellent 3
Notes:				

**Wrap up**

Do you have any questions for me?

[Indicate any next steps here, including invitations to upcoming events (Storefronts), connecting them with a staff member who is recruiting for a specific volunteer position, etc.]

## [SAMPLE VOLUNTEER PHONE SCREENING QUESTIONS]

It is important that the individuals conducting the phone screening are prepared with the appropriate questions. Throughout the phone screening, consider how well the volunteer and the position complement each other or how the potential volunteer listens and responds to the questions. Choose one or more appropriate questions from the following areas. You may choose to ask additional questions based on an individual's response to your initial question(s) and in relationship to position responsibilities outlined in the position description. You should aim to have 7-8 questions prepared for each phone screening and questions that have the potential volunteer describe an experience they've had tend to give more information about them.

### **Leadership Skills**

- What experiences have you had in working with adults in a volunteer or employment setting?
- What skills and qualifications do you have that will help you in this position?
- Describe how other adults would view you as a role model.
- Describe a time when you had to work as a member of a team to complete a project.
- Describe how you would engage other volunteers in programs where you are responsible.
- Give an example of how you would involve community members in your programs.
- What do you plan on doing as a volunteer?
- Describe a leadership role you have held. What made that role challenging? What did you like about serving in a leadership role? What did you dislike?
- What kind of rewards do you need to stay motivated?
- How do you like to be recognized?

### **Human Relations Skills**

- Consider the following scenario: Volunteers are talking behind an employee's back. What do you do?
- What kind of people do you most enjoy working with?
- Describe a time when you've been involved in a conflict with another individual or group. How did you handle the situation?
- How would you work with an upset volunteer?
- Describe a situation when you've been criticized. How did you react? What did you learn?
- What kinds of people do you find hard to work with and how do you handle the situation?
- Describe a time when you've worked closely with someone from a different background from yourself.
- How do you feel about working with people different from yourself? What did you learn? (i.e. different racial/ethnic backgrounds, developmentally disabled,

different socio-economic, backgrounds, different sexual orientation, etc.).

- Describe your ideal supervisor.

### **Organizational Skills**

- Describe a typical day for yourself. Describe a particularly busy day.
- What record keeping experience have you had?
- What techniques/methods have you found to be useful? What does not work well?
- Describe how you would help a group reach a decision.
- Describe instances when you have planned or conducted meetings.
- Describe an "ideal" meeting.
- Are you willing to attend orientation/training sessions to assist in your volunteer role?

### **Adaptability**

- Describe a situation in which you did not get your way or when you did not agree with a decision made. How did you handle it? What was your reaction?
- Describe a particularly stressful situation in which you have been involved. How did you handle this? What made it stressful?

### **Dependability**

- Describe one project/activity for which you had total responsibility from the beginning to the end.
- How do you handle a situation when you know that you are unable to complete an assignment or commitment?
- Do you have available transportation if needed?

### **Communication**

- How comfortable do you feel speaking in front of a group?
- What public speaking or writing experiences do you have?
- What, in your opinion, makes a good listener?
- What methods could you use to communicate with participants in a program that you are responsible for?
- Describe a situation when you were responsible for speaking in front of a group of people.
- What strategies do you use to communicate with others in a stressful or tense situation?

### **General Questions**

- What do you want to accomplish as a volunteer?
- Why do you want to be a volunteer in our organization?
- What is your view on competition?
- How important is winning to you?
- What attracted you to C.E.O. Women?
- Tell me about your current and past volunteer experiences.

- What have you enjoyed most about previous volunteer positions?
- How much time would you like to volunteer?
- What specific skills do you have to contribute to the program?
- Tell me about your work experience.
- What skills are you looking to use or develop in a volunteer position?

[SAMPLE PHONE SCREENING QUESTIONS FROM THE PROGRAM EVALUATION INTERN PROCESS]

Questions		Incompetent: 0 Fairly competent: 1 Competent: 2 Excellent: 3
1	<i>Fit for position:</i> (After a brief description of position) What qualifies you for the position of Program Evaluation Intern?	
2	<i>Motivation for project:</i> What motivated you to apply for this internship specifically with C.E.O. Women?	
3	<i>Interview experience:</i> Can you tell me about any experience you've had conducting interviews?	
4	<i>Experience with client population:</i> Tell me about any experience you have had working with a) immigrant and/or refugee women b) English as a Second Language learners	
5	<i>Ability to work independently:</i> Can you tell me about a time you had to work independently to manage and complete an important project? How did you approach planning, organizing, managing and executing the project? What were the results?	
6	<i>Sensitivity to client population's needs:</i> If you were asked to conduct one-on-one interviews with C.E.O. Women clients, what special considerations would you need to take with those clients to ensure that you gathered accurate information?	
7	<i>Collaboration:</i> If you were working collaboratively with another intern and the two of you were asked to input interview data into a client database as well as into an Excel workbook, how would you determine who has responsibility for which tasks?	
8	<i>Technical skills:</i> Please rate your knowledge of the following programs/ topics on a scale of 0-3. 0=know nothing 3=expert	
	Microsoft Excel	
	Microsoft Word	
	Database work	
	Project management skills	
	What foreign language skills do you have?	
9	<i>Other skills:</i> Do you have any other special skills or strengths that we should know about?	
10	<i>Availability:</i> What availability do you anticipate having during weekdays this summer? Would you be available to start an internship in late May and continue working through mid-August? (10-15 hours/week) What other commitments will you have?	
11	Do you have any other questions for me?	

[TEMPLATE NEWSLETTER BLURB]

Interested in volunteering with C.E.O. Women?

We are currently looking for volunteers for the following opportunities:

LIST OPPORTUNITIES HERE

For more information about volunteering with C.E.O. Women, please visit [www.ceowomen.org/helpout](http://www.ceowomen.org/helpout)

## **Guide to Volunteer Orientations**

### **1. Goals of an orientation**

General orientations allow C.E.O. Women to introduce the organization to a group of prospective volunteers in a consistent fashion. Volunteers are interested in meeting others who work with the organization and orientations also offer an initial opportunity for them to meet others who are joining our community. The first goal of an orientation is to educate the attendees about why C.E.O. Women does the work it does and how. That way, volunteers are equipped with some basic knowledge of the organization. The second goal of an orientation is to build community amongst prospective volunteers. The third goal is to energize prospective volunteers about the organization.

### **2. Who to invite**

General orientations are open to all prospective and active volunteers who are interested in learning more about C.E.O. Women. Prospective volunteers should attend an orientation before beginning their volunteer position if at all possible. The focus of orientation should be on prospective rather than active volunteers, since they have not yet been exposed to C.E.O. Women. Because of that focus, when you create an invitation list, you should pull from the pool of prospective volunteers.

### **3. Communications to prospective attendees**

#### **a. eNews announcement**

Once a date has been selected for a general orientation, you should include a brief announcement in eNews inviting volunteers and others to come to the orientation. The announcement should be in the eNews that is within a month before the date of the orientation. There is a sample announcement below.

#### **b. Email invitation to prospective volunteers**

Approximately two weeks before the orientation, you should email all prospective volunteers, inviting them to the orientation using eTapestry. There are templates in eTapestry and a sample below.

##### **i. Get a list of prospective volunteers from eTapestry:**

- 1. Go to the Reports section of eTapestry**
- 2. Select Volunteer Reports**

3. Select the All Volunteers report
  4. Run this report using the category Volunteers, Coaches, and Guest Speakers, and the query Volunteers, Coaches and Guest Speakers – Prospect – A
  5. Have the Development department double check this list to make sure the recipient list includes appropriate recipients
- ii. Create an email to send in eTapestry
  - iii. Send an invitation through eTapestry. For more information on how to do this, see  
\\Ceowserver2003\share\ORGANIZATION\C.E.O. Women HOW-TOs\DATABASE & EVALUATION\eTapestry\CHEAT SHEETS\Cheat Sheet.Create and Send Emails

c. Reminder email about invitation

The day before the orientation, you should send a reminder email to the same list that you used for the initial invitation. There are templates in eTapestry and a sample below.

#### 4. Logistics

a. When to host an orientation

Based on current volunteer needs and the number of volunteers attending orientations, orientations should be hosted once a quarter. Orientations should be hosted in January, May, August and early October (see below for more details about the timing of orientations)

- i. Based on the types of volunteers we most commonly work with, orientations should be hosted from 6-7pm on weekday evenings. Orientations in general should be hosted during the time period in which you expect volunteers to be able to volunteer (Classroom assistants for instance volunteer in the evenings, so hosting an evening orientation is appropriate for orientations focusing on them).
- ii. Orientations should last about an hour, unless there is specific training to be incorporated into the orientation (for instance with coaches).

b. Where to host an orientation

- i. Orientations in our building should be hosted in the 2<sup>nd</sup> floor conference room. Usually, you need to reserve the space online about a month in advance. You can do that here: [http://www.my.calendars.net/fcb\\_info](http://www.my.calendars.net/fcb_info)
- ii. Orientations in San Jose should be hosted at the training site.

c. Materials to bring to the orientation (find templates here: <\\Ceowserver2003\share\ORGANIZATION\VOLUNTEERS\3-Orientation>)

- i. Signs to the orientation location
- ii. Agenda
- iii. Sign-in sheet
- iv. Volunteer position sign-up sheet
- v. Volunteer handbook/contracts

d. Who hosts the orientation

- i. 1-2 staff should host the orientation, preferably 2 if possible in order to build relationships across staff with volunteers.
- ii. 1-2 current volunteers should be invited to speak at the orientation as guest speakers

5. Content

The content of an orientation can depend on who your target audience is, but for general orientations the content should focus on educating the attendees about the organization while giving them some tangible ways they can help.

The timing of orientations is designed to cater to specific volunteering needs related to CEOW's calendar. As such, when developing the content, you also want to have in mind which types of volunteers you expect at the orientation.

- January – A coaching cycle will begin in January, so this orientation is focused on coaches
- May – A coaching cycle will begin in June/July, so this orientation is focused on coaches

- August – Classes will start in September, so this orientation is focused on classroom assistants
- Early October – The annual event is approaching so this orientation is focused on event volunteers

As a general overview an orientation should contain the following components (there is a sample agenda for participants and a sample agenda for staff below):

a. Welcome and introductions

- i. Welcome everyone and thank them for being there
- ii. Introduce yourself and explain your reason for working with C.E.O. Women
- iii. Everyone should introduce themselves and share what they hope to achieve through volunteering with C.E.O. Women

b. The cause

This is an opportunity to explain why C.E.O. Women does the work we do. You want to explain our cause in detail and share statistics about our community.

c. The organization

Explain how C.E.O. Women addresses the cause (introduced above). This includes an explanation of our programs and our successes.

d. The volunteer program

- i. At this point in the presentation, you want to explain how volunteers support C.E.O. Women programs so that the audience begins to understand how they might fit with the organization.
- ii. Have invited current volunteers to share their experiences
- iii. Pass out volunteer sign-up sheets so that each person can indicate what types of volunteer activities they are interested in
- iv. This step is critical to gauging what types of activities they will find meaningful.

e. The conclusion

- i. Invite attendees to ask any questions they might have.
- ii. To conclude the orientation, have each attendee share something they learned about our work or how they are feeling about their desire to volunteer
- iii. If there is time, if you have a small group and you are in Oakland, then I recommend giving a brief office tour so that volunteers can learn about where the work happens.
- iv. Make sure you leave a few extra minutes at the end for networking/informal conversations

## 6. Follow up

- a. The day after the orientation, you should send a personal thank you email to everyone who attended the event.
- b. The day after the orientation, you should add a Journal entry in eTapestry for each attendee, stating that they attended the orientation, what they are interested in doing as a volunteer, and that they volunteered for the length of the orientation (usually 1 hour). For specific information about how to track volunteer orientation attendance in eTapestry, see the Guide to tracking volunteers.
- c. You should follow up individually with each volunteer about their specific interests within a week of the volunteer orientation and place as many of your new volunteers as quickly as possible, while they are still energized about the organization.

## 7. One-on-one orientations

If a volunteer is unable to attend an orientation, you want to make sure that before he or she begins volunteering they receive a basic orientation to the organization. Depending on what the volunteer's project is, the orientation can be very brief if necessary. The minimum information that you should include in a one-on-one orientation is:

- a. An explanation about CEOW's programs
- b. An explanation about how their project fits into CEOW's work and why their efforts are important
- c. An explanation about how to do their project

I also recommend sharing CEOW's communications cascade with the volunteer to fill in any gaps/answer any questions that you may not cover.

8. Templates and samples (see below)

[SAMPLE ENEWS ORIENTATION ANNOUNCEMENT]  
**Calling All Volunteers! Volunteer Orientation on May 18th**

Interested in volunteering with C.E.O. Women?

Join us for our upcoming volunteer organization and learn more about how you can get involved. The orientation will be at our offices on Wednesday, May 18<sup>th</sup>, 6:00 – 7:00pm.

To RSVP, email [rebecca@ceowomen.org](mailto:rebecca@ceowomen.org) with "Volunteer Orientation" in the subject line.

Learn more about **current volunteer opportunities** at C.E.O. Women.

[SAMPLE VOLUNTEER ORIENTATION INVITATION]

Subject: C.E.O. Women Volunteer Orientation: May 18th, 6-7pm

Greetings!

I am writing to you today to invite you to our upcoming **Volunteer Orientation** on May 18th. At the orientation, you will learn more about C.E.O. Women and our volunteer program as well as get a chance to meet other prospective volunteers. The event details are as follows:

**Volunteer Orientation**

Wednesday, May 18th, 6:00 - 7:00pm

405 14th Street, 2nd floor

Oakland, CA 94612

Will you be able to join us for this event? This is a great opportunity to get to know C.E.O. Women and meet other like-minded individuals who are interested in supporting our work. To RSVP, simply reply to this email or send an email to [rebecca@ceowomen.org](mailto:rebecca@ceowomen.org) with Volunteer Orientation in the subject line.

Warm regards,

Rebecca Beasley-Cockroft  
Program Associate and Volunteer Coordinator

[SAMPLE VOLUNTEER ORIENTATION REMINDER EMAIL]

Subject: Reminder: C.E.O. Women Volunteer Orientation May 18th, 6-7pm

Greetings!

You are invited to our Volunteer Orientation **tomorrow, May 18th**. At the orientation, you will learn more about C.E.O. Women and our volunteer program as well as get a chance to meet other prospective volunteers. The event details are as follows:

**Volunteer Orientation**

Wednesday, May 18th, 6:00 - 7:00pm

405 14th Street, 2nd floor

Oakland, CA 94612

Will you be able to join us for this event? This is a great opportunity to get to know C.E.O. Women and meet other like-minded individuals who are interested in supporting our work. To RSVP, simply reply to this email or send an email to [rebecca@ceowomen.org](mailto:rebecca@ceowomen.org) with Volunteer Orientation in the subject line.

Warm regards,

Rebecca Beasley-Cockroft  
Program Associate and Volunteer Coordinator

[SAMPLE THANK YOU FOR ATTENDING EMAIL]

Subject: Thank you for coming to C.E.O. Women's Volunteer Orientation last night!

Hi Everyone,

It was great to meet all of you last night and thank you for taking the time to learn more about C.E.O. Women. I will be following up with you individually about your specific volunteer interests in the next few days.

As we mentioned last night, our final Storefront Presentations events are coming up in June and you are all invited. At these events, clients will share their visual business plan portfolios. Your questions and feedback help each woman develop the content and delivery of her business plan and support her English language skills. There are two events, one in Oakland and one in San Jose. The specific information for both is below.

I will be in touch individually soon and if you have any questions in the meantime, let me know.

Warm regards,  
Rebecca

**San Jose Event**

**When:** Wednesday, June 8 from 6:30 PM - 7:30 PM

**Where:** 111 West St. John Street, #410, San Jose, CA

**RSVP for San Jose**

**Oakland Event**

**When:** Thursday, June 9 from 6:30 PM - 7:30 PM

**Where:** 1433 Webster Street, Suite 100, Oakland, CA

**RSVP for Oakland**

[SAMPLE VOLUNTEER ORIENTATION AGENDA FOR PARTICIPANTS]

**C.E.O. Women Volunteer Orientation**

Wednesday, May 18  
6:00 pm – 7:00 pm

- |   |             |
|---|-------------|
| <b>I. Welcome, Introductions and Refreshments</b>                         | <b>6:00</b> |
| <b>II. Barriers Immigrant Women Face</b>                                  | <b>6:10</b> |
| <b>III. C.E.O. Women: A Business Training Program for Immigrant Women</b> | <b>6:20</b> |
| <b>IV. C.E.O. Women's Volunteers</b>                                      | <b>6:35</b> |
| <b>V. Questions</b>   | <b>6:45</b> |
| <b>VI. Thank you for Coming!</b>  | <b>6:55</b> |
| <b>VII. Networking and Refreshments</b>                                   | <b>7:00</b> |

## [SAMPLE VOLUNTEER ORIENTATION AGENDA FOR STAFF]

### **Materials:**

- **Site key(s)** and contact/protocol info
- Sign-in sheet
- Markers
- Extra pens
- Nametags
- Signs
- Laptop
- Projector
- Speakers
- Episode 4 DVD
- Annual report
- One-pagers
  - CEOW Fact Sheet
  - Client Success Stories
  - Volunteering with CEOW
  - Program Impact Report
- Volunteer sign up sheet
- Food and drinks
- Plates, napkins, utensils if necessary
- **Handbooks, contracts, etc.**

### **Prior to presentation:**

- Hang signs
- Arrange food
- Prepare computer to play DVD
- Set up registration table with sign sheet and CEOW collateral

Time	Topic	Details	Materials
2 min	Welcome & Agenda Review	<ul style="list-style-type: none"> <li>• Thank everyone for coming</li> <li>• Did everyone sign the sign-in sheet?</li> <li>• Introduce self</li> </ul>	<ul style="list-style-type: none"> <li>• Sign-in sheet</li> </ul>
10 min	Introductions	<ul style="list-style-type: none"> <li>• Go around the room and have everyone introduce themselves <ul style="list-style-type: none"> <li>○ Have everyone share their name, where they are from and what the hope to accomplish as a volunteer</li> </ul> </li> </ul>	
10 min	The Cause	<ul style="list-style-type: none"> <li>• Share our mission</li> <li>• We know there are so many barriers facing immigrant women and we are working to help them overcome those barriers</li> <li>• Introduce Grand Café – what it is and how we use it</li> <li>• Introduce the scene with the mean banker (Yolanda and who she is)</li> <li>• Ask attendees to describe the barriers that Yolanda faces in that scene</li> <li>• Lead discussion about barriers</li> </ul>	<ul style="list-style-type: none"> <li>• Episode 4, scene 5</li> </ul>
15 min	The organization: About CEOW's programs	<ul style="list-style-type: none"> <li>• We have 3 program areas <ul style="list-style-type: none"> <li>○ Business Training Course <ul style="list-style-type: none"> <li>▪ First part: financial literacy</li> <li>▪ Second part: business plan creation</li> <li>▪ Graduation at end – invite family &amp; friends, certificate, etc.</li> </ul> </li> <li>○ Ongoing support services <ul style="list-style-type: none"> <li>▪ Coaching</li> <li>▪ Workshops</li> </ul> </li> <li>○ Access to capital program <ul style="list-style-type: none"> <li>▪ Lending circles</li> <li>▪ Matched savings accounts with partner organizations</li> </ul> </li> </ul> </li> </ul>	
10 min	The volunteer program	<ul style="list-style-type: none"> <li>• <i>Note: if no volunteer are able to speak, then use examples of volunteer experiences</i></li> <li>• In question and answer format have current volunteers share <ol style="list-style-type: none"> <li>1) Why you first got involved with CEOW</li> <li>2) What you did as a volunteer</li> <li>3) What you learned as a volunteer</li> <li>4) What advice you have for new volunteers</li> </ol> </li> <li>• Give an overview of the volunteer program, using the "Volunteering at CEOW" one-pager as an outline. Give examples of how volunteers work with CEOW</li> <li>• Pass out volunteer sign up sheets</li> </ul>	<ul style="list-style-type: none"> <li>• Guest speaker</li> <li>• Sign-up sheet</li> </ul>
5 min	Conclusion	<ul style="list-style-type: none"> <li>• Invite volunteers to ask questions they have</li> </ul>	

		<ul style="list-style-type: none"><li>• Have each volunteer share something they learned about our work or how they are feeling about their desire to volunteer</li></ul>	
5 min	Q&A	<ul style="list-style-type: none"><li>• Thank you for coming</li><li>• We will follow up individually with everyone based on their sign up sheets</li><li>• Any more questions?</li></ul>	

## Guide to Volunteer Training

Training a volunteer is always specific to what the volunteer is doing and their supervisor's style, but all volunteers should receive a basic training. The following are guidelines about how to prepare for a volunteer's training.

1. Each volunteer should be given a copy of CEOW's communications cascade, so that they have some basic information about the organization. This will also answer several questions that they may have about the organization, in addition to equipping them with information to share with their networks.
2. In order to establish clear expectations for the volunteer position, each volunteer should be given a copy of their position description, which should include their responsibilities and their supervisor (for more details about the position description, see the Guide to Recruiting Volunteers).
3. In addition to sharing the position description with them, review the expectations of the volunteer position so that both you and the volunteer are clear about what they will be doing. If there is an end product, it is also a good time to discuss what the end product should look like. For example with the graduation event planner position, the end product should be a smooth event in which we have all of the certificates, donated food, flowers etc. ready beforehand.
4. When introducing the volunteer to what they will be doing, explain to them how their position fits into CEOW's work.

For example, with volunteers who are phone bankers, you would explain the following:

They are part of our classroom outreach process. Before prospective clients come to classes, they contact us. We then call them to remind them about upcoming orientations and classes.

From here, they become clients once they join the classes.

5. When training the volunteer, it is important to explain why what they are doing is valuable to the organization. That gives them a sense of purpose and also expresses the appreciation we have for the work that they are doing.

For example (to use the phone banking volunteers again) you would explain that we call clients because the phone is the primary mode of communication for most of them. We also do email, but with our client base, the phone is more effective. Since we have large numbers of clients

to call, volunteers help us reach our target population in larger numbers than we would be able to do otherwise.

6. While training the volunteer, give them any additional information/resources they might need and an overview of what that additional information is.

For example classroom assistants get a copy of the classroom binder so that they can work with the students effectively. You want to explain what the binder is and how they should use it to be successful.

7. As part of the training process, share the Volunteer and Intern Policies and Procedures (included below) and have the volunteer sign the acknowledgement at the end. This signed copy should be filed in the volunteer's folder.

**Creating Economic Opportunities for  
Women, Inc.**

**VOLUNTEER AND INTERN POLICIES AND  
PROCEDURES**

*C.E.O.  
Women*

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*Creating Economic  
Opportunities  
For Women*

**September 2011**

Dear Volunteer,

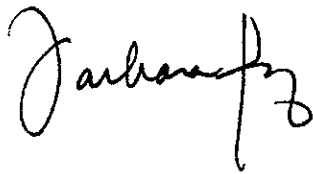
Thank you so much for volunteering with C.E.O. Women. We look forward to working with you!

It takes a village to create a supportive environment where women can achieve their dreams and become entrepreneurs, which is why your efforts as a volunteer are essential. In 2010, we worked with over 65 volunteers who provided over 850 hours of service. Without the support of our volunteers, we would not be able to deliver the important programs and services to women who have what it takes to succeed but need a little help getting there.

This Volunteer/Intern Manual is meant to provide volunteers and interns information about some of C.E.O. Women's policies and procedures. If you have any questions, please discuss the matter with your manager.

Here at C.E.O. Women, we are inspired daily by the immigrant and refugee women with whom we work. We sincerely hope this volunteer opportunity proves to be as rewarding for you as our work is for us. Thank you for your commitment and welcome to the C.E.O. Women community!

Sincere regards,



---

Farhana Huq  
Founder & President

## Conduct Policy for Volunteers

Our goal at C.E.O. Women is to maintain an atmosphere of consistency, fairness and respect for individual rights at all times. This allows for a professional and productive work environment for every volunteer and intern both in the workplace and at work related events.

All volunteers and interns are required to abide by certain rules and procedures established to protect our volunteers, interns and clients and to promote harmonious, efficient work practices. It is not possible to list all the forms of behavior that are considered unacceptable in the workplace. The following are examples of infractions of rules of conduct:

- Theft or inappropriate removal or possession of property
- Falsification of agency records, reports or timekeeping records
- Volunteering or interning under the influence of alcohol or illegal drugs
- Possession, distribution, sale, transfer, or use of alcohol or illegal drugs in the workplace, while contributing services, or while operating agency-owned vehicles or equipment
- Fighting or threatening violence in the workplace
- Boisterous or disruptive activity in the workplace
- Negligence or improper conduct leading to damage of agency-owned property
- Insubordination or other disrespectful conduct
- Violation of safety or health rules
- Smoking in prohibited areas
- Sexual or other unlawful or inappropriate harassment
- Unlawful discrimination
- Possession of dangerous or unauthorized materials, such as explosives or firearms, in the workplace
- Excessive absenteeism or any absences without notice
- Unauthorized use of telephones, mail system, or other agency-owned equipment
- Unauthorized disclosure of business "secrets" or confidential information
- Violation of agency policies
- Unsatisfactory performance or conduct
- Volunteers and interns may not give or lend clients money. Nor should volunteers or interns pay clients to do favors or run errands. Volunteers and interns may never take or borrow money or material goods from clients, nor may they take or use goods or services donated for clients' use.
- Volunteers and interns must maintain strictly professional relationships with clients. No social or sexual relationship may occur while the client is receiving, or potentially in need to begin receiving again, services from the organization.
- Volunteers and interns may not accommodate clients in the volunteers' or interns' homes.
- Grooming, dress and personal hygiene should be appropriate to the specific project in which the volunteer or intern is involved. Dress codes for the specific location will be at the discretion of the Program Director at that program.

Conduct that interferes with operations, that discredits C.E.O. Women or that is offensive to clients, staff, volunteers or interns will not be tolerated.

These rules do not preclude the establishment of additional rules by the individual C.E.O. Women programs or departments. The above list of examples of infractions that may result in disciplinary action does not in any way limit C.E.O. Women's ability to dismiss volunteers or interns from their placement/position, with or without cause and with or without notice.

## Sexual Harassment & Other Unlawful or Inappropriate Harassment

C.E.O. Women is committed to providing all persons associated with its operations, including volunteers and interns, an environment that is free from verbal, physical, sexual, visual or other forms of unlawful harassment or inappropriate work behavior. We prohibit sexual harassment and harassment based on any of the following categories: race, color, creed, religion, national origin, ancestry, age (40 and over), sex, sexual orientation, gender, gender identity, legal domicile status, veteran status, marital status, physical or mental disability, medical condition, pregnancy, AIDS/HIV status or any other characteristic protected under federal, state or local law. Violating the policy against harassment or participating in any other type of inappropriate behavior directed toward another individual as a result of a protected characteristic, or otherwise, is grounds for disciplinary action, which may include dismissal from volunteer or intern placement/position. The Organization's policy prohibits all volunteers and interns from engaging in harassment whether directed toward the Organization's employees or non-employees with whom the Organization has a business, service or professional relationship. Similarly, all employees and non-employees are prohibited from engaging in harassment of volunteers and interns at the Organization.

### **Definition of Sexual Harassment:**

In particular, sexual harassment is defined as any unwelcome sexual advances, requests for sexual favors and other verbal or physical conduct of a sexual nature which (1) has been made either explicitly or implicitly a term or condition of a volunteer or intern placement/position or employment (or contract relationship), (2) is used as a basis for employment (or other contract) decisions including but not limited to: hiring, compensation, promotions or benefits affecting such individual, or (3) substantially interferes with a volunteer's or intern's performance of services, an employee's work performance or an individual's contract or creates an intimidating, hostile, or offensive working environment.

Prohibited behaviors include, but are not limited to:

- Verbal conduct; e.g., suggestive, insulting or derogatory comments, epithets, innuendoes, sounds, jokes, teasing or slurs based on any of the above categories, and sexual propositions or threats.
- Written conduct: e.g., suggestive, insulting or derogatory letters; electronic mail messages; notes; and invitations.
- Physical conduct; e.g., assault, impeding or blocking movement, or any unwanted physical contact or interference with normal work or movement, including touching, pinching, brushing the body, impeding or blocking movement, contact or assault when directed at an individual because of any of the above categories.
- Visual conduct; e.g., derogatory posters, cartoons, suggestive objects, pictures, letters or drawings, websites or emails; also such actions as leering, whistling or obscene gestures based on any of the above categories.

- Unwanted sexual advances; threats or demands to submit to sexual requests as a condition of continued employment, volunteer or intern placement or position or to avoid some other loss, and offers of employment or some other contract benefits in return for sexual favors.
- Retaliation for having reported or threatened to report harassment.

### **Reporting and Remediating Discrimination And/Or Harassment**

C.E.O. Women's reporting procedure provides for a timely, thorough and objective investigation of any discrimination or harassment claim and appropriate disciplinary action against an employee, volunteer or intern found to have engaged in prohibited discrimination or harassment. All volunteers and interns are required to cooperate fully in any fact-finding investigation initiated by the organization.

**VOLUNTEERS AND INTERNS WHO BELIEVE THEY HAVE BEEN DISCRIMINATED AGAINST OR HARASSED ARE ENCOURAGED TO, AND SHOULD, MAKE A TIMELY REPORT.**

If you believe you have been discriminated against or harassed on a volunteer/intern placement/project, or if you are aware of the discrimination or harassment of others, you should provide a written or verbal report to your supervisor, any other member of management or the Executive Director as soon as possible. The Executive Director can be reached at the following telephone number: 510.836.3481 x311. The report should include details of the incident(s), the names of the individuals involved, the names of any witnesses, direct quotes when relevant, and any other documentary evidence such as notes, pictures, or cartoons. C.E.O. Women encourages volunteers and interns to report any incidents of discrimination and/or harassment immediately so that complaints can be quickly and fairly resolved.

**THE ORGANIZATION WILL INVESTIGATE ALL ALLEGATIONS OF DISCRIMINATION OR HARASSMENT.**

All incidents of discrimination and/or harassment that are reported will be investigated promptly, fairly, reasonably, effectively and thoroughly, using objective investigators. If C.E.O. Women determines that a violation of this policy has occurred, effective remedial action will be taken in accordance with the circumstances involved. Such remedial action will aim to eradicate the unlawful or inappropriate conduct. Any supervisor, agent, employee, volunteer or intern who has been found by C.E.O. Women, after an objective investigation, to have discriminated against or harassed another person in violation of this policy will be subject to discipline. Discipline may range from a warning up to and including termination of employment (even for a first offense), depending upon the severity of the circumstances. Non-employees may be warned and could lose their volunteer/intern placement/position or business, service or professional relationship with the Agency. Whatever action is taken to correct the situation will be made known to the complaining individual.

**CONFIDENTIALITY WILL BE MAINTAINED TO THE GREATEST EXTENT POSSIBLE.**

The Organization will endeavor to protect the privacy and confidentiality of all parties involved, including the victim, the accused and any witnesses, to the greatest extent possible consistent with a thorough investigation.

**RETALIATION IS PROHIBITED**

C.E.O. Women will not tolerate retaliation against any employee, volunteer or intern including the victim and any witnesses, who in good faith reports an incident of alleged discrimination or

harassment or provides information during an investigation. Engaging in retaliatory behavior in violation of this policy is grounds for disciplinary action, which may include dismissal from volunteer or intern placement/position.

If you have any questions concerning this policy, please feel free to contact your supervisor or the Executive Director.

### **Violence-Free Workplace**

One of the principal concerns at C.E.O. Women is that our staff members, volunteers and interns are provided with a safe work environment. C.E.O. Women will not tolerate physical violence or threatening behavior in the workplace, on agency property, or at work-related functions. (C.E.O. Women reserves the right to determine if particular actions are considered physical violence or threatening behavior.)

Violating the policy against violence in the workplace is grounds for disciplinary action, which may include dismissal from volunteer or intern placement/position.

Examples of violent or threatening behavior include, but are not limited to:

- Profane or abusive language
- Threats or insinuations of "getting even"
- Physical aggression, whether it's demonstrated or threatened
- Dangerous pranks or practical jokes
- Aggressive horseplay
- Fighting
- Stalking

### **Dismissal of a Volunteer/Intern**

Volunteers who do not adhere to the rules and procedures of C.E.O. Women or who fail to satisfactorily perform their volunteer assignment(s) are subject to dismissal from their placement/position. Possible grounds for dismissal may include, but are not limited to: gross misconduct or insubordination, being under the influence of alcohol or drugs, theft of property or misuse of agency equipment or materials, abuse or mistreatment of clients or co-workers or other volunteers, failure to abide by agency policies and procedures, and failure to satisfactorily perform assigned duties.

**Acknowledgment of Receipt of Volunteer and Intern  
Policies and Procedures**

I hereby acknowledge receiving a copy of C.E.O. Women's Volunteer and Intern Policies and Procedures, and I understand that it sets forth the terms and conditions of my volunteer/intern placement/position as well as the responsibilities and obligations of my contribution of services to C.E.O. Women, including the fact that I am an "at-will", non-employee, unpaid volunteer or intern. I understand and agree to be bound by the rules, policies and standards set forth in the Volunteer and Intern Policies and Procedures.

I also understand that C.E.O. Women reserves the right to revise, delete or add provisions to its policies and procedures. All revisions, deletions or additions must be in writing and signed by the Executive Director to be valid.

**Acknowledgment of Receipt of Volunteer and Intern  
Confidentiality Policy**

All programs and departments of C.E.O. Women have confidential information. Examples of confidential information are client names, social security numbers, employee, volunteer and intern information, financial statements, name of contributors, salary information, and contracts with government agencies.

All information and records obtained in the course of contributing services are considered confidential. Volunteers and interns must use confidential information concerning a client only as necessary in connection with the Agency's provision of services to such client. Depending on the nature of the service provided, client records may be protected by specific state and federal laws. C.E.O. Women expects managers at each program to be aware of the specific local, state, and federal laws regarding confidentiality that apply to the services the program provides. All volunteers and interns are responsible for compliance with the law and should address any questions about compliance with their managers or the Executive Director.

This policy also helps C.E.O. Women protect the confidentiality of our employees', volunteers' and interns' personal information. External requests for verification of volunteer/intern placement/position are provided with the basis dates of placement/position.

C.E.O. Women expects volunteers and interns to recognize confidential information and to treat it appropriately. If volunteers and interns are in doubt about the confidentiality of the specific information, they should ask their manager for clarification.

Any violation of the confidentiality requirements of C.E.O. Women will result in disciplinary action up to and including dismissal from volunteer/intern placement/position.

I hereby acknowledge and accept C.E.O. Women Volunteer and Intern Policies and Procedures and Volunteer and Intern Confidentiality Policy.

\_\_\_\_\_  
Volunteer/Intern's Name (Printed)

\_\_\_\_\_  
Volunteer/Intern's Signature

\_\_\_\_\_  
Date



## **Guide to Tracking Volunteers**

It is important to track our volunteers because this gives staff a sense of the individual's engagement with the organization, and lets us evaluate how effectively we are using volunteers. Volunteers can be a huge asset to the organization, but if we do not track their interactions with the organization, then we are not able to efficiently use them as a resource.

In addition, we need to track volunteers for the following reasons:

- Collecting contact information
- Measuring the number of individuals we have pipelined
- Grant reporting
- Financial reporting

### 1. What to track for volunteers

- a. Contact information
- b. Content of the volunteer application (if available)
- c. Steward
- d. Volunteer Status (needs regular updating)
- e. Volunteer Type
- f. Location of volunteer service
- g. Volunteer Year (needs regular updating)
- h. Volunteer hours

### 2. How to track volunteers

Volunteer information is kept in eTapestry. Most volunteers will fill out an application on CEOW's website (via Wufoo) that contains the initial information we need to track. See the guidelines below for volunteers who do not fill out the volunteer application.

- a. Prospective volunteers should not be entered into eTapestry until they have been screened (for instructions about the screening process, see the guide to recruiting volunteers)
- b. Once staff has done an initial screening, the volunteer should be entered into eTapestry. To do this , follow these steps:

- i. Search in eTapestry to see if they already have an entry. If so, add a Journal entry detailing your conversation and fill in any of the fields explained in the next 8 steps that is not already filled out.
- ii. If they do not exist, add a new account
- iii. Indicate their role as a "Constituent"
- iv. Fill out their "Name", "Address", "Voice" (phone number), "Email", "Short Salutation" (first name), "Long Salutation" (full name), and "Company" and "Job Title" if you have that information. Then move on to the next step.
- v. In the "Basic Account Information" category, indicate their "Account Type" as an "Individual"
- vi. Mark yourself as their "Primary Steward" in the "Donor Cultivation" category, unless they will not be working with you
- vii. In the "Volunteer Tracking" category, indicate their "Volunteer Status" as "Prospect". If they are a prospective coach or guest speaker, indicate their "Coaching Status" or "Guest Speaking Status" as appropriate
- viii. In the "Volunteer Application" category, fill out as much information as possible. Filled out, the volunteer application category should look something like this in eTapestry:

The screenshot shows the eTapestry interface for a volunteer application. At the top, there is a navigation bar with links like 'Dashboard', 'Print', 'Help', 'Fund Support', 'Site Map', and 'Logout'. Below this is the BENEVOLENCE NEXTSTEP logo and a navigation menu with options like 'Main', 'Communicate', 'Mass Update', 'Reporting', 'Manage', 'Next Step', and 'Help'. A secondary menu includes 'Find Account', 'Add Account', 'Quick Gift Entry', 'Query', 'Report/Export', 'My User', 'Dashboard', and 'Logout'. The main content area displays the profile for 'Yadira Antonio', a constituent with account number 5535. The 'Volunteer Application' section is highlighted, showing the following details:

- Date of Inquiry:** 7/23/2011
- Availability:** Afternoons on Tuesdays, Wednesdays and Thursdays
- How did you hear about us?:** Other
- Position of Interest:** Office Volunteer
- Other Interests:** Translation and Interpretation
- Preference (experience & interest 1):** Other
- Languages Spoken:** Spanish
- Notes:** Interested in helping with: Volunteer coordination, planning events, reaching out to clients and prospective clients about our programs, translation and interpretation.

A detailed paragraph follows, stating: 'I am currently unemployed and would love to make myself available as a translator for a volunteer position you have available. I am currently enrolled in an interpretation and translation program which enables me work effectively in both English and Spanish, whether it is doing interpretation or translation work. I am a hard worker who is passionate about languages and learning, but most importantly about helping those who are at disadvantage. I have developed excellent communication skills through ten years of customer service experience. I am detailed oriented, organized, and reliable. I meet all the qualifications to take on this volunteer opportunity.'

- ix. Then click Next to move on to the next step and preview the information you have entered. If any information needs updating, go back and update it. If it is complete, click Next again to finish the account set-up process.

c. Switching a volunteer from being a Prospect to being Active

The status of volunteers who have begun their volunteer project should be switched from Prospect volunteers to Active volunteers. To do that, do the following:

- i. Go to the individual's defined fields
- ii. Under Volunteer Tracking, change their Volunteer Status to Active
- iii. Fill out the Volunteer Type (if you select Other, also fill out the Other Volunteer Type)
- iv. Fill out the Location of Volunteer Service
- v. Fill out the Volunteer Year
- vi. If any of the other categories are relevant, fill those out as well

If a volunteer is no longer interested in volunteering with the organization, or we determine that they are not an appropriate individual to volunteer with the organization, they should be marked under Volunteer Status as Inactive.

d. Guest Speakers and Coaches

There are a few additional steps for Coaches and Guest Speakers, since we use their information in a different way. For specific information about tracking coaches, talk with the Small Business Advisor or see the Women Connected binder.

For Guest Speakers, there is an additional field to indicate their Guest Speaking Status in the Volunteer Tracking category. Fill that field and update it as guest speakers express interest and present to the classes.

e. Continuing to track volunteers after their first project

Some of our volunteers take on more than one project during their tenure with C.E.O. Women. Because of this, it is important to continue to update volunteer information as they take on new projects. When you are adding a volunteer's hours for their new project for the first time (see section 3b below on how to track volunteer hours), you should also do the following:

- i. Go to defined fields
- ii. Under Volunteer Tracking, update Volunteer Type and Volunteer Year to include the new volunteer project. Both of these fields can contain multiple values.
- iii. If there is any other relevant information in the Volunteer Tracking category (coaching status, client mentee, etc.), update that as well. See the example below:

<b>Volunteer Tracking</b>
Volunteer Status: <b>Active</b>
Volunteer Type: <b>AYRB Classroom Assistant, Classroom Assistant, Event Volunteer, Intern</b>
Other Volunteer Type: <b>Orientation speaker</b>
Location of Volunteer Service: <b>Oakland, San Francisco</b>
Last Volunteer Date: <b>12/17/2010</b>
Volunteer Year: <b>2011, 2010</b>
Baby Boomer (Born 1945-1965): <b>No</b>

f. Pipelining volunteers

Volunteerism is one of the ways that new individuals get in touch with and learn about C.E.O. Women. The Development team tracks the number of individuals who have had a significant initial contact with the organization as pipelined individuals. Volunteers should be marked as pipelined individuals in the following instances:

1. They have attended a C.E.O. Women orientation or event (Storefronts, Global Marketplace, etc.)
2. They have started a volunteer project

For information about how to pipeline an individual, see <\\Ceowserver2003\share\ORGANIZATION\C.E.O. Women HOW-TOs\DATABASE & EVALUATION\eTapestry\CHEAT SHEETS\Cheat Sheet.Pipeline>

### g. High Level Volunteers

There are some volunteers that we treat differently because of how they are currently engaged in the organization. These include Board members, the Advisory council, the Development council and the generic category of "high level volunteer." When tracking these individuals there is one extra step:

Under the Cultivation category, they have a Special Role. Indicate what that special role is when you are entering them into eTapestry.

Note: The High Level Volunteer special role is used primarily for individuals we are cultivating for high level donations or Board membership. We use this field as a way to keep these individuals off of our regular volunteer email lists.

### 3. Tracking volunteer hours

#### a. What to track volunteer hours for

We track volunteer hours for anything for which an individual has volunteered their time to support the organization. That includes:

- i. Attending an orientation
- ii. Hours spent on their specific volunteer project
- iii. If a volunteer, or prospective volunteer is invited to Storefronts as a way to learn about the organization or volunteer for the organization and support our clients, then their hours should be tracked as volunteer hours. If someone is invited as a guest to the event, then their time should NOT be tracked as volunteer hours, since they were not there as a volunteer.

#### b. How to track volunteer hours

- i. Go to the individual's account in eTapestry
- ii. Go to their Journal
- iii. Add a new Contact in the Journal
- iv. Fill out the date on which the individual volunteered

- v. In the Subject, fill out a brief description of what they did as a volunteer
- vi. In the Method, choose Volunteering
- vii. Add any notes or additional details about their volunteering that are relevant in the notes section
- viii. In the category Volunteer Tracking do the following two things:
  1. Under Volunteer Type, indicate the type of volunteer work they did. If what they did is not an option, then choose other
  2. Under Volunteer Hours, input the amount of time they spent volunteering

Here is a sample of what this should look like:

Contact	
Final:	<input type="checkbox"/>
Date:	01/20/11
Subject:	Volunteer hours - client interviews
Method:	Volunteering
Note:	<p>Interviewed Ludy Zamora and Elia Buendia</p> <p>Contacted other clients to try to interview them</p> <p style="text-align: center;">Free form notes</p>
<b>Volunteer Tracking</b> Volunteer Type: <b>Volunteer Interviewer</b> Volunteer Hours: <b>2.5</b>	

c. How to get the number of hours volunteered

Volunteers are much more accurate when calculating the amount of time they volunteer than staff are. As much as possible, it is important to ask volunteers how much time they put into their particular project. There are two ways do to that – you can either ask the volunteer how

much time they spent on their project in the past month (see sample email below), or send them the Google Form asking them to fill out their volunteer hours (which you can find below and here: [https://docs.google.com/spreadsheets/viewform?hl=en\\_US&pli=1&formkey=dFkzVGtFUTFMQWJQenJiQm4xNThqc3c6MQ#gid=0](https://docs.google.com/spreadsheets/viewform?hl=en_US&pli=1&formkey=dFkzVGtFUTFMQWJQenJiQm4xNThqc3c6MQ#gid=0)). In either form, volunteer hours should be estimated to the nearest half hour.

There are several exceptions to this:

- Guest Speakers
- One-time event volunteers
- Board Members

Since we already have a sense of the time spent by these individuals, staff should record their hours on a regular basis and skip asking them for the amount of time they have spent volunteering.

d. Frequency of tracking volunteer hours

Staff should ask volunteers once a month how much time they spent on their projects and then record that information in eTapestry. If they do not hear back from a particular volunteer, they should estimate the amount of time.

e. Regular volunteer positions to track

We have several volunteer roles that we track on a regular basis. These are useful to think about as the end of the month approaches to make sure that you are recording the hours volunteers have donated to the organization:

1. Coaches
2. Classroom assistants
3. Board members
4. Clients who helped with outreach (spoke at orientations and media appearances, Community Connectors, etc.)
5. Development council members
6. Guest speakers and workshop presenters
7. Advisors
8. Event volunteers
9. Interns
10. Office support volunteers

Note: this is only a partial list and does not include all of the different types of volunteers. It is intended rather to help remember who has volunteered.

#### 4. Tracking client volunteer hours

Clients volunteer with CEOW in a variety of different ways – as guest speakers, as spokespeople about the organization, at orientations, at media presentations, as Community Connectors, etc. – and we want to include their contribution in our reporting on the volunteer program. Since we track all of our client information in VistaShare, we also track our client volunteer hours there.

##### a. Who tracks client hours

The programs staff person who worked with the client is responsible for tracking the client's volunteer hours in VistaShare.

##### b. How to track client hours

- i. Go to the client's page and click on their Activity\_List tab
- ii. Click on Enroll in Activity. This will open a pop up screen.
- iii. In the Description box, search for Program Events 2011
- iv. Select the Program Events 2011 activity
- v. Enter the Begin Date and End Date
- vi. Enter the Provider, Hours, Event Title and Event Type
- vii. Enter the Client Role. It is **essential** that you choose Volunteer in addition to any other roles in this category.
- viii. Click update and close

Here is an example of what the popup screen looks like when completed:

Enrollment Details **Notes** Tasks/Reminders Print

---

Close Unenroll Update Update & Close

Begin Date 06/23/2011  Provider Beasley-Cockroft, Rebecca

End Date 06/23/2011  Hours 4.00

---

Event Title Wells Fargo Presentation

Event Type Outreach   
 Other, please specify

Client Role Booth/Business Promotion   
 Other Client Role, please specify

---

Close Unenroll Update Update & Close

(Alt-Shift-c=Close, Alt-Shift-l=Unenroll, Alt-Shift-p=Update, Alt-Shift-u=Update & Close)

**5. Role of the volunteer coordinator in tracking volunteers**

The volunteer coordinator is responsible for driving efforts to track volunteers accurately and mostly engages in the tracking process to track volunteer hours. The volunteer coordinator should not be tracking each volunteer's information. That responsibility falls to the volunteer's manager.

In an ideal situation, staff are already tracking hours in eTapestry as they work with their volunteers and there is no need to have the volunteer coordinator go through the process outlined below. However, in practice that does not occur, so it is necessary to have an individual drive this process in order to ensure that volunteer hours are tracked.

To ensure proper tracking of volunteer hours, the volunteer coordinator should do the following:

- a. Send an email to staff at the end of each month, asking them to submit a list of the volunteers they've worked with and the hours those volunteers have contributed (See above for information on how to get the number of hours volunteered, see below for a sample email to staff)

- b. Send individual emails to staff asking them about specific volunteers that you know they have worked with but not included in their list of volunteers.
- c. Input the information received from staff into eTapestry
- d. Input the information from the volunteer hours log into eTapestry
- e. Input the information collected in the coaching report
- f. Input guest speaker hours from the information collected in the current class Google document (Starting a Small Business attendance sheet)

[Volunteer Hours Log Google Form]

[https://docs.google.com/spreadsheets/viewform?hl=en\\_US&pli=1&formkey=dFkzVGtFUTFMQWJQenJiQm4xNThqc3c6MQ#gid=0](https://docs.google.com/spreadsheets/viewform?hl=en_US&pli=1&formkey=dFkzVGtFUTFMQWJQenJiQm4xNThqc3c6MQ#gid=0)

## Volunteer Hours Log

Hello Volunteer, Thank you for volunteering with C.E.O. Women. Your volunteer hours for September are now due. Could you please fill out the volunteer log for any time you have spent working on a volunteer project in the past month, rounded to the nearest half-hour, by the 13th of October? Please include any time you may have spent preparing for your volunteer project. These reports help us keep track of the number of hours you have contributed to the organization and allow us to provide any support that you may need. If you have any questions, please contact Rebecca Beasley-Cockroft at (510) 836-3481 x315 or [rebecca@ceowomen.org](mailto:rebecca@ceowomen.org). Warm regards, Rebecca and the C.E.O. Women Staff

---

\* Required

Name \*

Volunteer Project \*

Total time spent on the project (in hours) \*

Do you need any support from C.E.O. Women at this time?

[SAMPLE EMAIL TO STAFF ABOUT TRACKING VOLUNTEER HOURS]

Hi ladies,

It's the last day of the month so it is time to track all of our volunteer hours for the month. **By October 5th**, please send me the names of the volunteers you've worked with and the amount of time they volunteered over the past month. To jog your memory, below is the list I brainstormed to track for the month (of course I will accept other volunteers too!):

Client interviewers

Board members (including the Board meeting)

Clients who supported outreach for both August and September

Guest speakers (clients may also have done this)

Development Council

Coaches

Anyone helping with GM11 prep

Anyone helping with outreach

MC for GM11

Thanks and yay for volunteers!

Best,  
Rebecca

[SAMPLE EMAIL INFORMING VOLUNTEERS THAT THEY SHOULD TRACK THEIR VOLUNTEER HOURS]

Hi Monica,

I am writing to you today to introduce myself - I am Rebecca Beasley-Cockroft and I am the volunteer coordinator with C.E.O. Women. Thank you so much for volunteering to help us in the classroom during the fall semester. We look forward to working with you over the coming months and know that the students will benefit immensely from your support.

As a heads up, I will be emailing you a form at the end of each month in which you need to track the hours that you have spent volunteering with C.E.O. Women, including any time you spend preparing for your project. This information allows us to track the progress of our volunteer program and provide you any support that you need. If you have any questions or need any support, you are of course always welcome to reach out to me as well.

We are excited to have your support and look forward to a great semester with you!

Warm regards,  
Rebecca

[SAMPLE EMAIL TO VOLUNTEERS ASKING THEM TO REPORT THEIR HOURS]

Hi Lauren,

This is Rebecca Beasley-Cockroft, Program Associate with C.E.O. Women and I am working on our volunteer program. I hope this e-mail finds you well. I am writing because I am in the process of tracking our volunteer hours and Farhana mentioned that you had helped with the planning of the Development Council. Could you give me an estimate of the amount of time you spent working on the Development Council? Collecting this information allows us to report on the progress of our volunteer program.

Thank you for your support of C.E.O. Women and let me know if you have any questions.

Regards,  
Rebecca

## Guide to Evaluating Volunteers

It is important that volunteers are completing their projects effectively and developing their skills. In order to ensure that this is happening, it is important to evaluate volunteers both during their service and at the end of their projects so that they continue to support the organization in the most beneficial way possible. Providing volunteers an evaluation of their work helps them grow as individuals while improving their abilities to support CEOW.

Like volunteer training, evaluation is specific both to the volunteer and their project, but most volunteers (all except one-time volunteers) should receive some kind of evaluation. The following are guidelines for evaluating volunteers:

1. As part of the training process, each volunteer should receive his or her volunteer position and have a discussion his or her supervisor about the expectations of that position. These expectations are what a volunteer should be evaluated on.
2. In order to assess a volunteer's progress, it is important to check in with them regularly on their progress. This gives them the chance to ask any questions that they have and also holds them accountable.

Regular check-ins can be a simple email, phone call, or in-person conversation asking the volunteer how the project is going and if they have any questions or need clarification about their project. There is a sample check-in email below.

3. Give volunteers feedback as they go. This includes both positive and negative feedback. That way they know if they need to curb their behavior or if they are doing something well.

Like a regular check-in, this can be a simple email, phone call or in-person conversation sharing what he or she has done well or how he or she could improve for the future. Ongoing feedback can also be part of the regular check-in process and you can group the two together. There is a sample of feedback combined with a check-in below (also, there is a thank you included too which is part of recognizing volunteers on an ongoing basis).

4. Give feedback at the end of the volunteer project, ideally within a month of completion. This is an opportunity to look at the volunteer's overall performance. Let them know how they did and how they can grow in the future. Some of the topics for feedback you should consider are:
  - Communications skills
  - Dependability
  - Planning and Organization
  - Responsiveness

- Productivity and Quality
- Problem-Solving Abilities

Depending on the type of volunteer and the length of the project, feedback can be brief (maybe a 10-20 minute phone call or paragraph email) or an in person conversation. In general, the more in depth the relationship you have with the volunteer, the more substantial their feedback should be.

5. Ask for their recommendations about how to improve the process for the next volunteer. Since they were the ones that actually did the project, they are the best suited to recommend improvements to the processes. This also helps them feel valued.

Note: Volunteers will be taking an evaluation survey about their experiences with C.E.O. Women within 6 months of the completion of their project. This is a way to gain some feedback about the quality of their experience with us as an organization. For more information about that survey, see the Guide to Evaluating the Volunteer Program.

[SAMPLE CHECK IN WITH A VOLUNTEER VIA EMAIL]

Hi Rebecca,

I'm writing today to check in with you about your progress on the guide to evaluating volunteers. How is it going? Do you have any questions or need any more information to help you continue moving forward?

Let me know if you need any support and I hope all is well!

Best,  
Rebecca

[SAMPLE FEEDBACK EMAIL]

Hi Rebecca,

This looks great! Thank you for the notes from your first volunteer interview!  
How did it feel to you? Any recommendations about the process or questions?

In general I think the one other piece to include in your recap would be a recommendation as to whether or not we should work with the volunteer and if yes, where would they fit best.

Thank you again and as always, let me know if you have questions.

Warm regards,  
Rebecca

## **Guide to Evaluating the Volunteer Program**

There are many reasons to evaluate the volunteer program – for grant proposals and reporting, measuring how effectively we use volunteers, understanding how to improve the program, etc. While there is a plethora of information we could collect about the volunteer program, we have chosen to focus on specific goals and metrics. The following is a guide to evaluating the volunteer program.

There are two components to evaluating the volunteer program: one which is internal and one which collects feedback externally through a survey that volunteers complete.

### **Goals for the volunteer program (internal evaluation)**

The goals for the volunteer program are consistent with its mission to “increase the capacity of the organization through both time and money so that CEOW can reach more women and deliver our programs effectively.”

While there are many different ways to measure how we are fulfilling our mission, the goals should reflect the 6-8 most important (and measurable) components of the volunteer program, enabling the manager of the program to evaluate and make decisions about the program.

The current volunteer program includes 6 short term goals (1 year) and 3 long term goals (3-5 years). These are not designed to be rigid goals and should evolve as the volunteer program evolves.

#### **1. Current goals for 2011 (also listed below)**

The current goals provide important insight into the volunteer program. As the volunteer program continues to grow, the targets associated with each goal should grow.

##### **a. Each volunteer contributes 9.3 hours on average**

This goal measures both the number of active volunteers and the number of hours those volunteers spend on CEOW projects. The higher the average, the less recruitment time spent on each individual.

We anticipate that 150 volunteers will contribute 1400 hours in 2011

##### **b. 115 volunteers complete their projects**

We want to ensure that volunteers are finishing their projects to ensure that we are recruiting high quality individuals and communicating clear expectations.

Completion means that a volunteer has fulfilled their duties and time commitment as outlined in the volunteer position description.

Some volunteer projects are multi-year and we track project completion over the course of one year. For multi-year projects, if the individual is continuing to work on the project at the end of the year and is fulfilling the obligations of their project, then their project is considered complete for that year.

Example: A Board member starts in June 2011 with a 2-year term. The Board member attends the Board meetings and meets with the President regularly. At the end of 2011, their project is considered complete for 2011, even though their term will continue until 2013. However if that Board member left at the end of 2011, then their project would be incomplete because they did not fulfill the full time commitment of the project.

c. 35 volunteers take on new roles or repeat roles from 2010

We want our volunteers to continue to engage with the organization so that we do not have to continuously train new individuals. Regular engagement also increases the likelihood that we can convert those individuals into donors.

d. 80 volunteers donate \$60,000 to the organization

Part of the volunteer program is related to donor cultivation and stewardship. Since volunteers traditionally donate more than non-volunteer donors, we want to ensure that our volunteers are also supporting the organization financially. This goal includes Board members. We are looking to have 70 non-board volunteers donate \$10,000 this year (this is a stretch goal for 2011).

e. We offer 155 volunteer opportunities, giving volunteers the opportunity for regular interaction with staff

In an effort to continue to bring new individuals into contact with CEOW and engage current volunteers on a more consistent basis, we want to ensure that we have sufficient volunteer opportunities. This goal is about creating and deepening connections with the organization.

f. Through orientations, we educate 20 volunteers about CEOW and equip them to talk about us

We want to ensure that our volunteers are educated about CEOW so that they can be ambassadors for our cause. A volunteer orientation is a prime opportunity to do just that. We estimate that 5 volunteers will attend each orientation and we will provide 4 orientations over the course of the year.

## 2. Long Term Goals (also listed below)

We are not tracking long term goals, but they are broader goals that we have as the volunteer program grows.

- a. Volunteers approach us with new ideas/projects to help us develop the organization

This can be measured by the number of volunteer opportunities available and the retention rates of volunteers. (More on these measurements in section 3 below).

- b. Volunteers develop and run committees to help us increase our capacity as an organization

This can be measured by the number of volunteer opportunities available and the retention rates of volunteers. (More on these measurements in section 3 below).

- c. We regularly report to stakeholders on what volunteers have accomplished

## 3. How we measure the goals for 2011

In order to measure progress toward goals for the volunteer program, there are 17 metrics to track (for more information about how to track volunteers, see the Guide to Tracking volunteers). A document that contains the metrics for 2011, the goal for each metric, an estimate for 2012 goals for each metric and a comparison with 2009 and 2010 can be found here:

\\Ceowserver2003\share\ORGANIZATION\VOLUNTEERS\9-Goals and Strategy\ Volunteer Metrics 20110707 RBC

Some of the metrics are designed to calculate automatically based on other metrics, some of the metrics will require you to pull reports in eTapestry, and some require ongoing maintenance. Below is a description of how to calculate each of the metrics needed to measure progress towards the volunteer program's goals:

- a. Volunteer hours

Volunteer hours are the sum of non-client volunteer hours (collected in eTapestry) and client volunteer hours (collected in VistaShare).

To calculate non-client volunteer hours in eTapestry:

- i. Go to the Volunteers, Coaches and Guest Speakers Query category in eTapestry
- ii. Select the Volunteer Hours Tracking query
- iii. Edit the dates in the query to reflect the time period you are looking for and then save
- iv. Go to the Volunteer reports category
- v. Run the Tracking Volunteer Hours report
- vi. Select the category: Volunteers, Coaches, and Guest Speakers
- vii. Select the query: Volunteer Hours Tracking –JE
- viii. Submit the report. At the top of the report, there should be a sum of the total hours volunteered in that time period

To calculate client volunteer hours in VistaShare:

- i. Go to the Reports section of VistaShare
- ii. Select the report category Program Reporting
- iii. Select the Client volunteer hours in 2011 report
- iv. Add the total from the Program Events 2011.enrollment begin date column and the total from the Community Connectors June 2011.enrollment begin date column.

Note: This will give you the total for the year to date. If you are looking for quarterly or monthly information, see the appropriate column for that specific information.

b. Total number of unique active volunteers

- i. To generate the report from eTapestry, follow the instructions for Volunteer hours

- ii. Count the number of the volunteers who are in that report
- c. Average volunteer hours

This should auto-calculate in the metrics document. If not, it is based on the total volunteer hours and the total number of unique active volunteers. Take an average of the number of hours.

d. # of volunteers who donate

- i. Go to the Volunteers, Coaches and Guest Speakers Query category in eTapestry
- ii. Select the Volunteer gifts in a particular time period query
- iii. Edit the dates in the query to reflect the time period you are looking for and then save
- iv. Go to the Volunteer reports category
- v. Run the Volunteer Donors report
- vi. Select the category: Volunteers, Coaches, and Guest Speakers
- vii. Select the query: Volunteer gifts in a particular time period – JE
- viii. Submit the report.
- ix. Count the number of volunteers who are in that report

e. # of volunteers who donate minus Board members

- i. To generate the report from eTapestry, follow the instructions for # of volunteers who donate
- ii. Remove the individuals that have Board Member in the Special Roles column

f. Total donation amount for volunteers

- i. To generate the report from eTapestry, follow the instructions for # of volunteers who donate

- ii. At the top of the report, there should be a sum of the total donation amount in that time period

g. Total donation amount for volunteers minus Board members

- i. Follow the steps above for total donation amount for volunteers
- ii. Remove the individuals that have Board Member in the Special Roles column
- iii. Sum the donation amounts

h. Average volunteer donation amount

This should auto-calculate in the metrics document. If not, it is based on the total donation amount and the # of volunteers who donate. Take an average of donation amount.

i. Average volunteer donation amount minus Board members

This should auto-calculate in the metrics document. If not, it is based on the total donation amount minus Board members and the # of volunteers who donate minus Board members. Take an average of the donation amount.

j. # of volunteers with new or repeat roles in one year (2+ projects)

- i. To generate the report from eTapestry, follow the instructions for Volunteer hours
- ii. Count the number of individuals who have more than one volunteer role listed under their names

k. Volunteer retention rate within a year

This refers to the number of volunteers who take on more than one position within a year. For information about volunteer project completion, see metric xvii below.

This calculation should auto-calculate in the metrics document. If not, it is based on the total number of unique active volunteers and the number of volunteers with new or repeat roles in one year. Take a percentage of these numbers.

l. # of volunteers who volunteered the year before

- i. Go to the Volunteers, Coaches and Guest Speakers Query category in eTapestry
- ii. Select the Volunteer Hours Tracking query
- iii. Edit the dates in the query to include the previous year as well as the current year
- iv. Go to the Volunteer reports category
- v. Run the Tracking Volunteer Hours report
- vi. Select the category: Volunteers, Coaches, and Guest Speakers
- vii. Select the query: Volunteer Hours Tracking –JE
- viii. Submit the report.
- ix. Count the number of individuals who have dates that include both the current and prior year

m. Volunteer retention rate from the year before

This refers to the number of volunteers who take on at least one position in two consecutive years. For information about volunteer project completion, see metric xvii below.

This calculation should auto-calculate in the metrics document. If not, it is based on the total number of unique active volunteers and the number of volunteers who volunteered the year before. Take a percentage of these numbers.

n. # of volunteer opportunities available

This needs to be maintained on a regular basis. As volunteer positions are created, they should be added to the list of available opportunities, including how many of that particular position are available. This information is tracked in the Volunteer Opportunities tab of the metrics document.

o. # of volunteer orientation attendees

- i. To generate the report from eTapestry, follow the instructions for Volunteer hours

ii. Count the number of individuals who have Orientation Attendee listed as one of their volunteer Types

p. # of volunteer projects completed

This needs to be maintained on a regular basis. As volunteer projects are filled and completed, that information should be added to the Volunteer Opportunities tab of the metrics document.

q. Volunteer projects completion rate

This should auto-calculate in the metrics document. If not, take a percentage of the number of volunteer opportunities available and the number of volunteer projects completed.

**Evaluation survey from volunteer directly (external evaluation)**

This survey is a way to get feedback from our volunteers. The survey allows us to collect information about the quality of our volunteers' experiences as well as collect suggestions and quotes from volunteers. It also enables us to identify any problems our volunteers are experiencing.

The evaluation survey should be sent once every 6 months to any individual who has completed a project with us over that period of time. The survey is a Google Form that lives here:

[https://docs.google.com/spreadsheet/viewform?hl=en\\_US&formkey=dHIJTF9mR2VYQjJnaXE3eEFnSzRyQVE6MA#gid=0](https://docs.google.com/spreadsheet/viewform?hl=en_US&formkey=dHIJTF9mR2VYQjJnaXE3eEFnSzRyQVE6MA#gid=0)

## [VOLUNTEER PROGRAM GOALS]

These can also be found here:

\\Ceowserver2003\share\ORGANIZATION\VOLUNTEERS\9-Goals and Strategy\  
Volunteer Goals for 2011 20110707 RBC

## **Volunteer Program 2011**

### **Mission**

Increase the capacity of the organization through both time and money so that CEOW can reach more women and deliver our programs effectively.

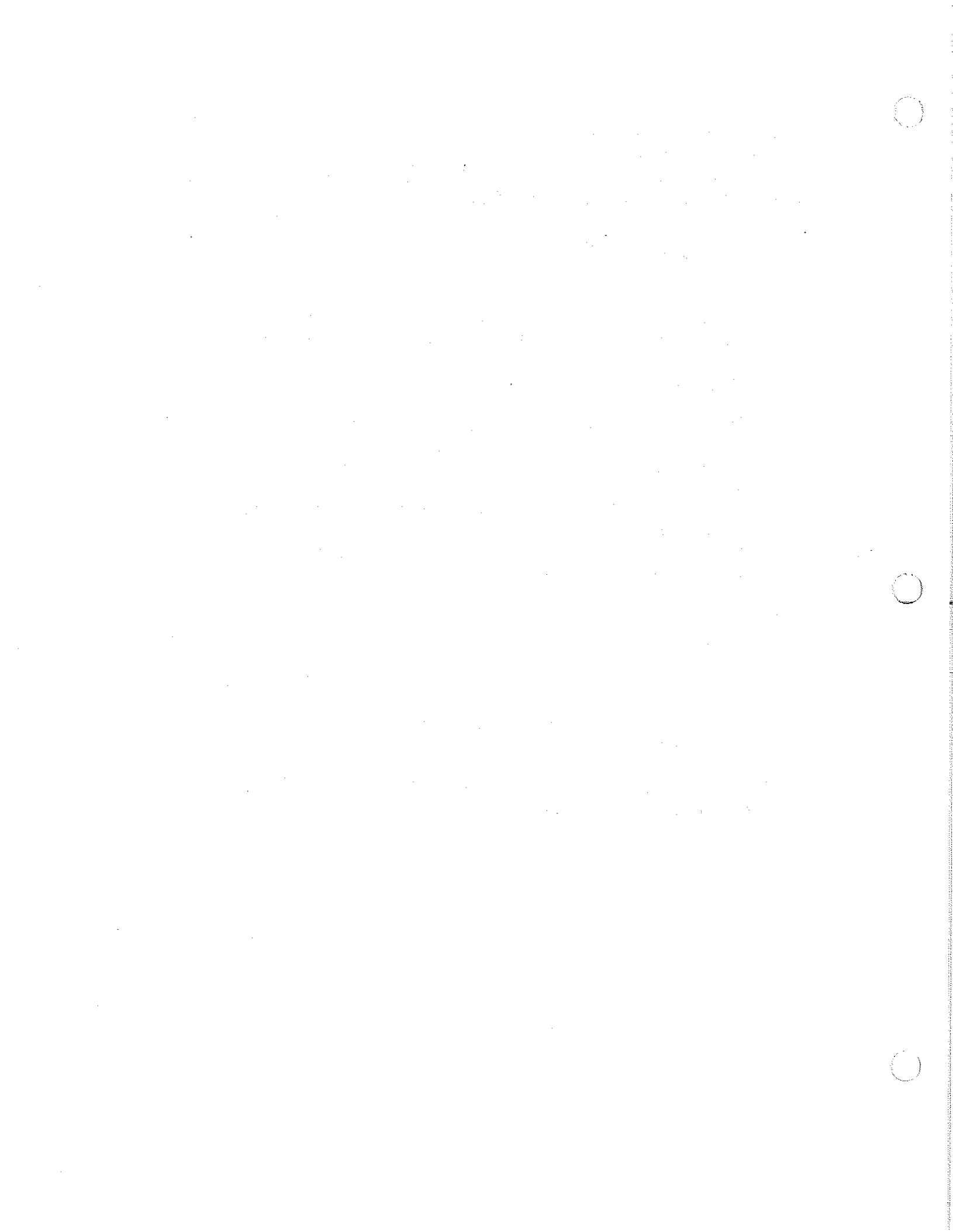
### **Short Term Goals**

1. Each volunteer contributes an average of 9.3 hours
2. 115 volunteers complete their projects
3. 35 volunteers take on new roles or repeat roles from 2010
4. 80 volunteers donate \$60,000 to the organization
5. We offer 155 volunteer opportunities, giving volunteers the opportunity for regular interaction with staff
6. Through orientations, we educate 20 volunteers about CEOW and equip them to talk about us

### **Long Term Goals**

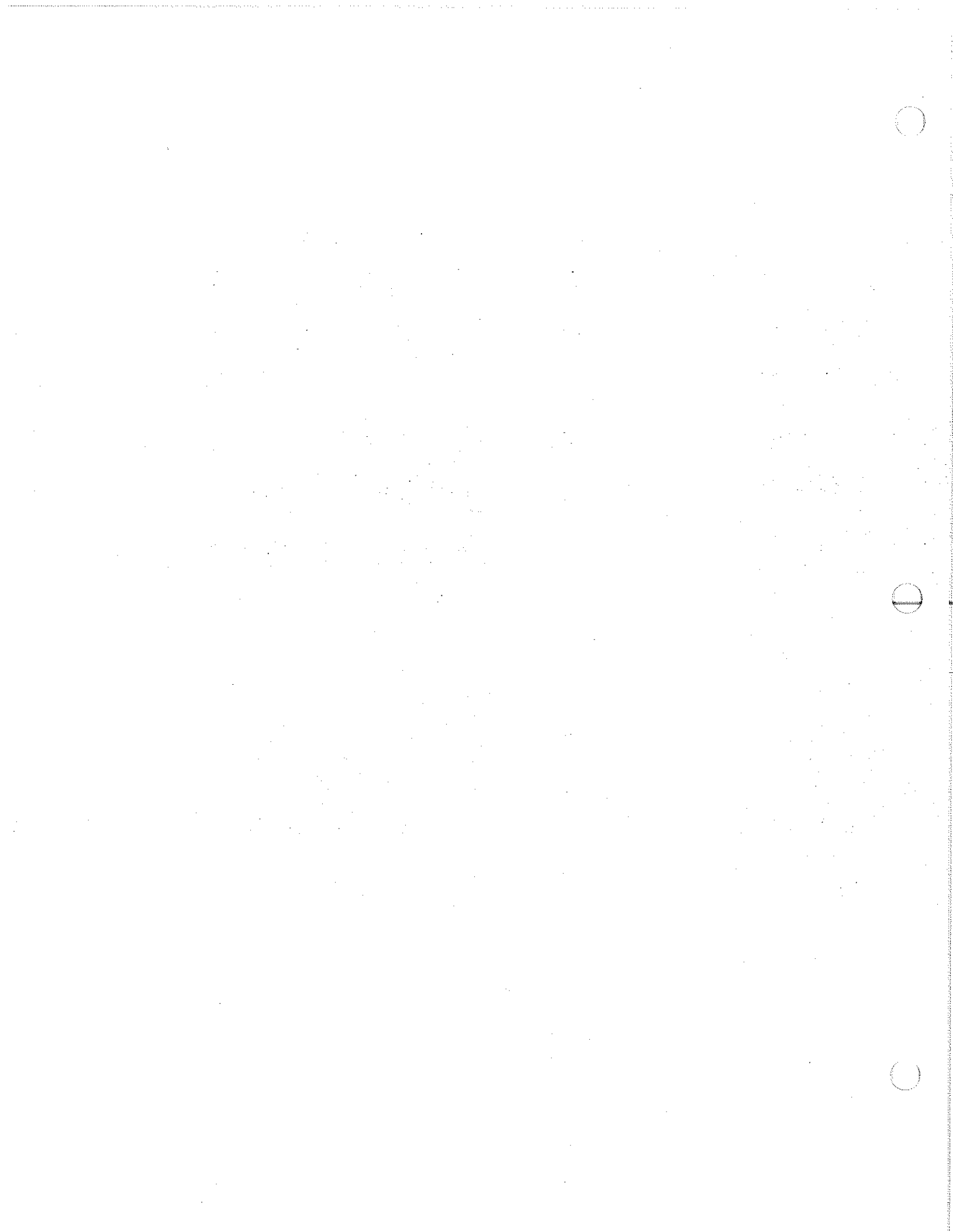
1. Volunteers approach us with new ideas/projects to help us develop the organization\*
2. Volunteer-run committees develop to help us increase our capacity as an organization\*
3. We regularly report to stakeholders on what volunteers have accomplished

\*To be measured in the future by the number of volunteer opportunities available and the retention rates of volunteers

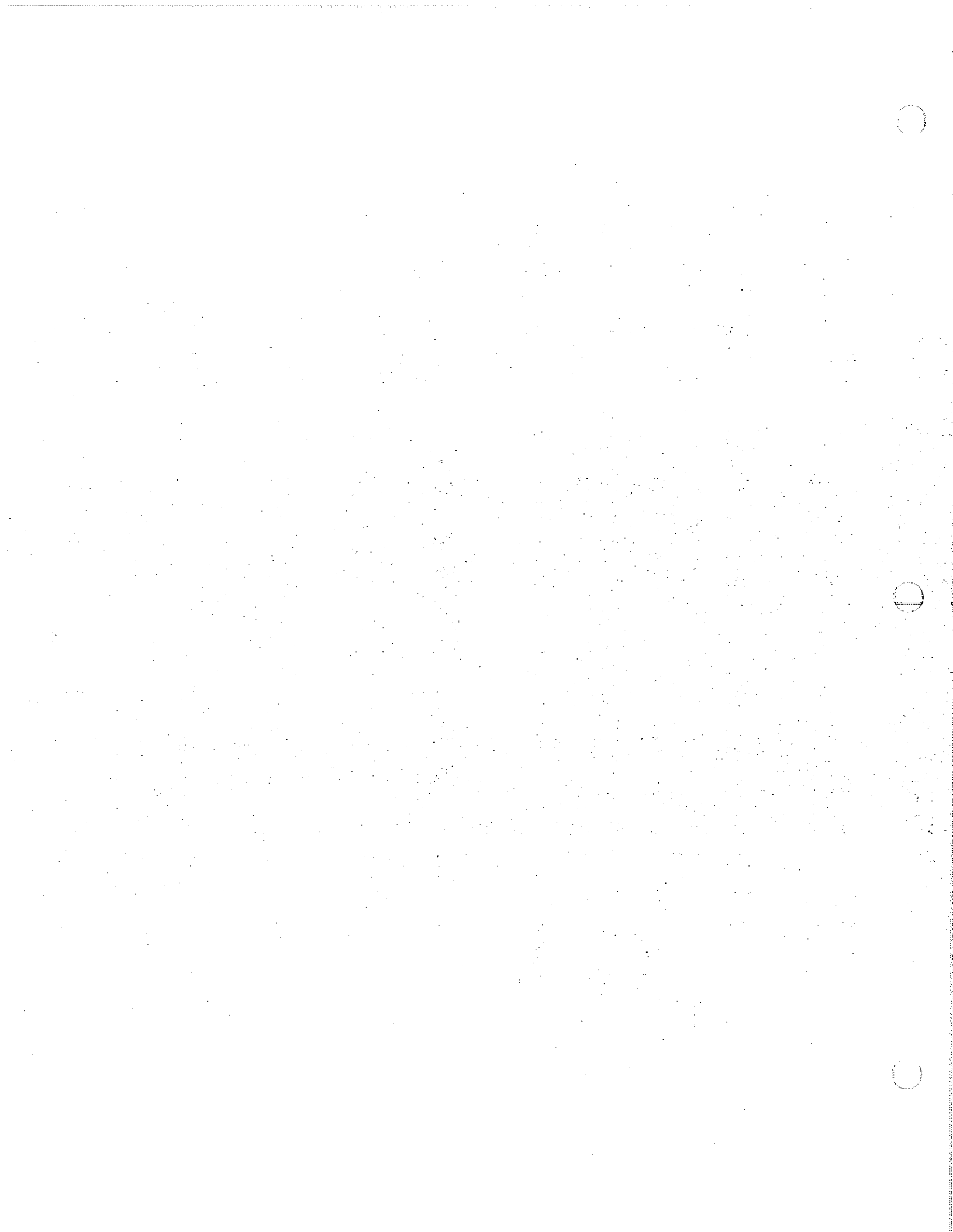


### Volunteer Metrics

Metric	2009	2010	% Δ 09-10	2011	% Δ 10-11	Overall % Δ	2011 Projected	2012 Project
Total volunteer hours	307	922.75	200.57%	1315	42.51%	328.34%	1400	1800
Total number of unique active volunteers	10	87	770.00%	195	124.14%	1850.00%	150	200
Average volunteer hours	30.7	10.606322	-65.45%	6.7436	-36.42%	-78.03%	9.3333333333	9
Volunteers who donate	21	37	76.19%	31	-16.22%	47.62%	80	100
Total donation amount from volunteers	#####	\$49,211.30	-52.31%	\$78,485	59.49%	-23.94%	\$60,000	\$80,000
Average volunteer donation amount	\$4,913.69	\$1,330.04	-72.93%	\$2,532	90.35%	-48.48%	\$750	800
Volunteers who donate minus Board	17	31	82.35%	23	-25.81%	35.29%	71	91
Total donation amount from volunteers minus Board	\$9,785.00	\$16,395.00	67.55%	\$10,145	-38.12%	3.68%	\$10,000	\$20,000
Average volunteer donation amount minus Board	\$575.59	\$528.87	-8.12%	\$441	-16.60%	-23.37%	\$141	\$220
Volunteers with a new or repeat roles (2+ projects) in a year	0	11	NA	37	236.36%	NA	40	60
Volunteer retention rate within a year	0.00%	12.64%	NA	18.97%	50.07%	NA	26.67%	30.00%
Volunteers who volunteered the year before	NA	2	NA	31	1450.00%	NA	35	70
Volunteer retention rate from the previous year	NA	2.30%	NA	15.90%	591.54%	NA	23.33%	35.00%
Volunteer opportunities available	NA	NA	NA	269	NA	NA	155	254
Volunteer orientation attendees	NA	NA	NA	29	NA	NA	20	30
Volunteer projects completed	NA	NA	NA	119	NA	NA	115	200
Volunteer project completion rate	NA	NA	NA	44.24%	NA	NA	74.19%	78.74%

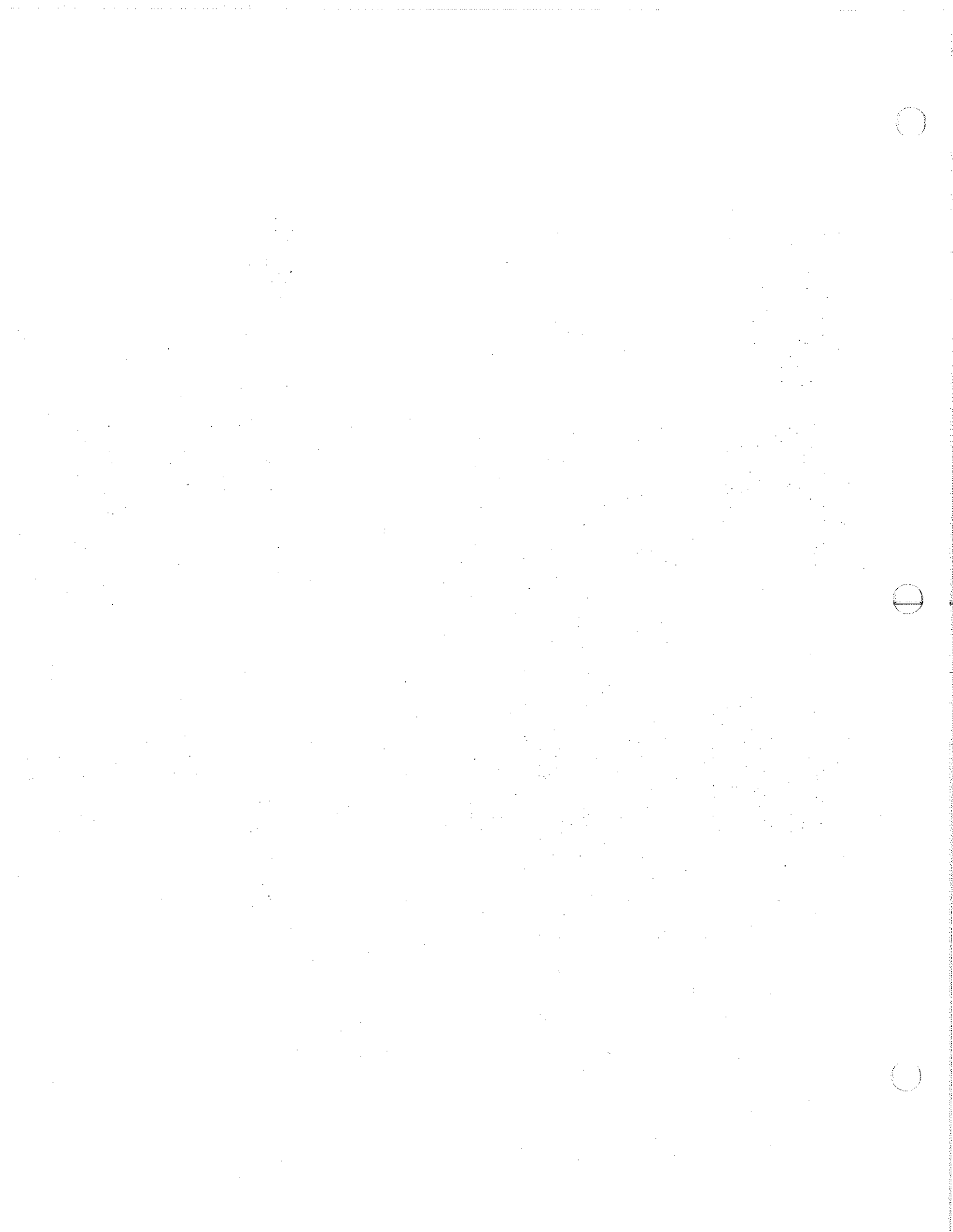


	2011 Actuals	2011 Projected	Difference
Total volunteer hours	1315	1400	85
Total number of unique active volunteers	195	150	-45
Average volunteer hours	6.74358974	9.333333333	2.58974359
Volunteers who donate	31	80	49
Volunteers who donate minus Board	23	71	48
Total donation amount from volunteers	\$78,485	\$60,000	-\$18,484.67
Total donation amount minus Board giving	\$10,145	\$10,000	-\$145.00
Average volunteer donation	\$2,532	\$750	-\$377
Average donation amount minus Board giving	\$441	\$141	-\$3
Volunteers with a new or repeat roles (2+ projects) in	37	40	3
Volunteer retention rate within a year	18.97%	26.67%	7.69%
Volunteers who volunteered the year before	31	35	4
Volunteer retention rate from the previous year	15.90%	23.33%	7.44%
Volunteer opportunities available	269	155	-114
Volunteer orientation attendees	29	20	-9
Volunteer projects completed	119	115	-4



Opportunities for 2012

	Positions created	# filled	# completed	Projected
Classroom assistants	16	15	6	16
Coaches	19	18	5	8
Board members	9	9		9
Development Council	6	7		6
Event volunteers	2	2	2	1
Guest speakers	9	9	9	5
Workshop presenters	7	4	4	12
Pro bono	2	2	2	12
Advisory Board	15	15		2
Database Miner	1	1		15
Media research	1	3		3
Social media team	5	7		3
Client interviewer	3	3	1	5
Graduation event planner	1	1	1	3
Phone bankers	12	12	10	2
Graphic designers	1	1	1	15
Photographers	6	3	3	2
Outreach Volunteers	14	2		5
Storefront Presentation Help	14	14	11	10
Storefront Event Attendees	40	23	23	20
Volunteer Interviewer	1	1	1	40
ABC taping	15	11	6	NA
House Party Host	4	2	2	4
Orientation speakers	8	9	9	8
Annual Event volunteers	24	24	21	25
Client business directory prep	1			1
Strategic planning interviewer	1	1	1	NA
Event Host Committee	30	9		20
Evaluation interns	2	1	1	2
Total	269	209	119	254



# Volunteer Feedback Survey

Dear Friends,

Thank you for volunteering with C.E.O. Women. As volunteers finish their projects, we ask them to take a brief survey. The following questions are designed to help us assess and improve our volunteer program so we can continue to provide positive experiences for all of our volunteers. We appreciate all that you have done to support our efforts. We would not be able to accomplish our goals without your help. If you have any questions or concerns, please feel free to contact our volunteer coordinator, Rebecca Beasley-Cockroft at [rebecca@ceowomen.org](mailto:rebecca@ceowomen.org).

Warm regards,  
Rebecca Beasley-Cockroft  
Program Associate & Volunteer Coordinator  
\* Required

**Please indicate the types of volunteer activities you have participated in with C.E.O. Women in the past 6 months. Select all that apply. \***

- Board Member
- Business Coach
- Classroom Assistant
- Client Interviewer
- Development Council Member
- Event Volunteer (for example helped set up and clean up at the October fundraiser)
- Graphic Designer
- Guest Speaker in the classroom
- Photographer
- Workshop Presenter
- Other:

**How many hours have you volunteered with C.E.O. Women in the past 6 months? (estimate) \***

- 1-5 hours
- 6-10 hours
- 11-30 hours
- 31-50 hours
- 51+ hours

**How would you rate your overall volunteer experience? \***

	Not at all			Very much so
My experience met my expectations	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



	Not at all				Very much so
My experience made use of my expertise.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My experience matched my volunteering interests.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I received the support I needed.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**Please rate the following: \***

	Not at all				Very much so
My volunteer position(s) was meaningful to me	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
I received appropriate training for my position(s)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
The goals of my volunteer position(s) were clear	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
My work was appreciated	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

**What was the best part about volunteering with C.E.O. Women?**

**Is there anyone we should contact who might be interested in volunteering with C.E.O. Women?**

**Please provide any additional feedback about your volunteer experience. We are always looking to improve our volunteer program.**



**May we use your responses to tell others about C.E.O. Women?**

If so, please provide your full name and email address.

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## Guide to Volunteer Recognition

Volunteer recognition is one of the essential components to the volunteer program. When volunteers feel recognized and appreciated, they are more likely to continue volunteering with the organization and represent the organization well in their communities.

The most important piece of recognition is maintaining a culture of thanks – saying thank you on a regular basis. Recognition is everybody's responsibility, not just the volunteer's manager. It does not have to be a grand gesture of thanks, nor does it need to be incredibly time consuming. Recognizing a volunteer can be as simple as sending a thank you email or card. It should be done separate from any other communication however, so as not to dilute the message of thanks.

It is also important to remember that everyone likes to be recognized in different ways. When thinking about how to thank volunteers, keep the Platinum Rule in mind: Do unto others as they want done unto them. In other words, try to thank them the way they want to be thanked, not necessarily the way you might want to be thanked. A simple way to determine the type of recognition volunteers are looking for is to ask them why they are volunteering (building their resume, sharpening their skills, meeting new people, etc.). The type of recognition they are looking for is usually tied to the motivation behind their volunteerism.

When to thank volunteers:

1. Thank them for their service as they start
2. Thank them throughout their service
3. Thank them at the end of their service

Different ways to recognize volunteers (and not the only ways!):

1. Say thank you verbally (see example below)
2. Say thank you in a written note
3. Offer to write a letter of recommendation
4. Offer to be a reference
5. Introduce your volunteer to other staff members (this is also important for re-engagement efforts)
6. When you introduce your volunteer to staff, explain how they contribute to the organization

7. Feature the volunteer in a newsletter for the organization or on the website
8. Give them a personalized tour of the office
9. Have the President or Executive Director thank them
10. Ask for their feedback once they have completed their project (also part of evaluating volunteers)
11. Host a volunteer recognition event (see the Guide to Hosting a Volunteer Recognition Event)
12. Send the volunteer a birthday card
13. Pass along a resource to a volunteer that they might be interested in
14. Give them a "promotion" to a volunteer position with more responsibility
15. Ask them for feedback about our programs/operations
16. Post a thank you on CEOW's Facebook wall
17. Give them a certificate of appreciation for their service

[SAMPLE THANK YOU EMAIL]

Hi Karen,

It was great to meet you in person last night. On behalf of C.E.O. Women, I would like to thank you for generously volunteering your time at last night's workshop. Your time and contribution help immigrant and refugee women in our program continue to get the support they need to establish successful businesses.

Warm regards,  
Rebecca



## **Guide to Hosting a Volunteer Recognition Event**

A volunteer recognition event is an event that CEOW should host on a yearly basis to thank volunteers for their contributions over the past year. Hosting a recognition event demonstrates that CEOW appreciates our volunteers and is committed to building the volunteer community. In addition, the event allows volunteers to meet one another outside of their defined project and serves as a point of contact for donor cultivation/stewardship of volunteers.

In 2011, we hosted a recognition event for the first time since 2008. Since these types of events should be different every year, the following is an explanation of what we did for the event in 2011 and includes recommendations for future events.

### **1. When to host the event**

#### **What we did:**

- a. We intentionally hosted the event in late July because of its proximity to our annual fundraising event and because our classes were not currently running.
- b. We hosted the event in the evening from 6-8pm on a weeknight, since that is when we usually run our events and one of the time frames during which our volunteers regularly engage with our work.
- c. There is a timeline for the event with all of the preparation steps included below.

#### **Recommendations:**

- a. The event should be hosted a few months before the annual fundraising event to create another touch point with volunteers before asking them to give.
- b. We recommend that the event be held in the evening on a weekday evening for reasons stated above.
- c. We recommend that the event should be approximately 2 hours. This gives volunteers the opportunity to arrive, mingle, watch the program and then converse with staff and other volunteers afterwards, without making the event prohibitively long and burdensome to attend.

- d. The event should be built into the Development calendar, so that the communications for the event are coordinated with other Development efforts.
- e. Once you have set a date for the event, you should build out an event timeline. You should aim to identify the event location as soon as possible. The remaining event preparations can happen within a month of the event. See the included timeline below and section 3g for the recommended timeline for invitations.

## 2. Where to host the event

### **What we did:**

We hosted the event at Sports Basement at the Bryant St. location in San Francisco. They offer free space to local nonprofits and provide food and drinks for events hosted in their space. In addition, they offer a 10% discount to guests and 10% of the purchases guests make are contributed back to the nonprofit.

### **Recommendations:**

The event can be hosted in a variety of different places. In an ideal situation, the event would be hosted as a house party at a volunteer's house or office. (for more information see \\Ceowserver2003\Share\ORGANIZATION\EVENTS\HOUSE PARTIES\House Party Information Packet).

Because our programs are dispersed throughout the Bay Area, it is a challenge to choose a location that will work for everyone. Of course, not every volunteer will come, but when choosing a location, it is important to keep in mind where our volunteers are located.

## 3. Invitations

### **What we did:**

#### a. Who we invited

We invited clients who had volunteered with us in 2010 and 2011 (listed in VistaShare).

With non-client volunteers, we started with the list of Active volunteers and then removed individuals based on feedback from Development, either because they were high-level donors with whom we wanted to limit communication or because they were inaccurately tracked as

Active volunteers. Then we generated a custom account query in eTapestry. In total, we invited 125 non-client volunteers.

b. How we invited our client volunteers

Clients received a personal email and a follow up phone call to invite them to the event

c. How we invited our non-client volunteers

- i. We set up an EventBrite page that included information about the event (sample included below). EventBrite allows individuals to “buy” tickets (this is a free event, so the cost is \$0) and allows CEOW to easily collect RSVPs.
- ii. We sent out invitations using the query we set up in eTapestry (see part a) two months before the event. To do this, we did the following:
  1. Created an email and included the EventBrite link so that invitees can easily RSVP (see template below)
  2. Sent the email to the custom account query.

d. Follow up and reminder invitations

After the initial invitations went out, we sent a reminder email two weeks before the event and a week before the event (sample below).

**Recommendations:**

e. Who to invite

- i. We recommend inviting all volunteers who have volunteered in the past year. This includes both clients and non-client volunteers. Our tracking systems are now much more accurate so this list should be easy to access in eTapestry.
- ii. Based on the ratio of individuals we invited vs. the number of attendees as well as the current size of our Active volunteer pool, aim to have 30-50 event attendees.

f. How to invite volunteers

- i. Since this is an event designed specifically for our volunteers, we don't want the event to be open to the public, which means that

we don't want to include the event on our Events page nor do we want to announce it in the monthly eNews.

- ii. In the original planning of a recognition event, we proposed doing hard copy invitations that were mailed. If the budget allows, this is something we recommend. However, in order to minimize the amount of time spent collecting RSVPs, invitations should also be emailed via eTapestry and there should be an online RSVP option. EventBrite is a very useful site to collect and streamline RSVPs.
  - iii. Client volunteers should be invited via phone because it is generally their preferred method of communication.
- g. Recommended timeline
- i. The initial invitation should be sent out one month in advance. Two months was too much notice.
  - ii. One to two weeks after the initial invitation goes out, each staff member should call their volunteers and personally invite them to the event.
  - iii. The week of the event, we should send out a reminder email via eTapestry about the event.

#### 4. Materials and speakers for the event

##### **What we prepared:**

a. Sign in sheet/RSVP list

This is similar to our standard event sign in sheet. We included the name and contact information of all of the individuals who RSVPed, and left room for other attendees to write in their names.

b. Ribbons for client attendees

These are standard ribbons that we give clients at our events to distinguish them from other attendees.

c. Stewardship lists for staff

We assigned each staff member a few of the volunteers who RSVPed to facilitate conversation.

d. Event flow document

This document outlined the timeline for the actual event and the duties assigned to each staff member. See sample below.

e. Program (sample included below)

The program included the following pieces

- i. Title of the event
- ii. Order of speakers for the ceremony
- iii. Thank you to in-kind donors
- iv. Brief "about C.E.O. Women" section
- v. Quotes from staff thanking volunteers

We had each staff member write a brief paragraph thanking their volunteers as a group, which we compiled and included in the program.

f. Slideshow

We prepared a slideshow of volunteer and program photos, and included the quotes from staff thanking volunteers among the images.

g. Music

We brought a cd of international music to play before and after the ceremony.

h. Nametags

We made nametags for all of the volunteers who RSVPed.

i. Donations

We solicited donations for the event in order to make it a low cost event. The food and drinks were all donated items from Costco and Sports Basement. We also had a cake for the event that was donated.

j. Preparing speakers

- i. Client/volunteer prep

We asked a client volunteer to speak about her experiences working with a volunteer and as a volunteer. To prepare her for the presentation, we asked her to prepare answers to the following questions:

1. How did you work with a volunteer?
2. How did the volunteer help you?
3. Why did you decide to volunteer as a workshop presenter with C.E.O. Women?
4. What did you learn as a volunteer with C.E.O. Women?

We then rehearsed her speaking points over the phone.

ii. Staff prep

We asked our President to speak for 5-10 minutes at the event, covering the following topics:

1. Welcome everyone
2. Sharing what our volunteers have done/accomplished with CEOW
3. Sharing a few highlights from what staff have said about their volunteers
4. Thanking our volunteers for all of their contributions

The volunteer coordinator prepared a summary for sections 2 and 3 to support the President in the preparation of her speaking portion.

**Recommendations:**

We recommend preparing the materials listed above. Please note that the preparation for speakers will vary depending upon the event program.

## 5. The event structure

### **What we did:**

#### a. Ceremony

The event itself was scheduled to run from 6-8pm. We started the program at 6:30pm to give individuals time to arrive and talk with one another. The program lasted about 20 minutes and consistent of the following:

- i. Our President opened the program with a welcome and talked about what we did with our volunteers and what volunteers enabled the organization to do
- ii. A client volunteer spoke about how she worked with a volunteer and then why she volunteered herself
- iii. The Volunteer Coordinator wrapped up the program with some facts about what our volunteers have accomplished and a thank you

#### b. Reception

After the ceremony, we cut the cake and encouraged individuals to have refreshments. Staff also used their stewardship lists to facilitate conversations with and between volunteers.

There are pictures from the reception saved here:  
\\Ceowserver2003\share\PICTURES\2011\Volunteer Appreciation Celebration

### **Recommendations:**

What the event actually entails should change from year to year. It is important that the event hold value for our volunteers and avoiding repetition helps maintain that value. The following includes recommendations as well as ideas for future events:

#### a. Event program

The event program should be brief (aim for approximately 20 minutes of speaking). The event should focus on thanking volunteers and also giving them the opportunity to get to know each other. Keeping the program short helps maintain that focus. The program should take place during the middle of the event.

## i. Speeches

You will want to have 2-3 speakers deliver brief comments.

1. Member of the leadership team (ED, President, Board member, etc.) who delivers a thank you to volunteers
2. Volunteer who shares their experience
3. Potentially a client who shares their story and how volunteers have helped them

## ii. Recognition techniques

There are many different ways to provide recognition at this type of event. Below are some different ways that you could incorporate recognition techniques into the event. The most important aspect of recognition at this event is to make sure that the recognition of volunteers is done evenly. If you are recognizing individuals, you do not want to stress one individual's contribution more than another's.

### 1. Awards

Giving out awards is complicated – you are recognizing individuals instead of the whole group. It is important to maintain a balance between recognition of the individual and recognition of the group, but if you are forced to choose, always sacrifice individual recognition so that you can recognize the group.

Awards are a way to get individuals to attend the event. However, it is important to remember that not everyone values awards and certificates. If you are going to offer awards, keep the following things in mind:

- a. When deciding what types of awards to offer, we need to outline what the award categories are and what the characteristics of award recipients need to be in each category
- b. Be creative with the names and types of awards (Grand Café House Blend Award for instance could be an award for a volunteer who

is consistently supported CEOW over several years)

- c. Have volunteers nominate themselves
- d. Have a selection committee comprised of volunteers that chooses the award recipient
- e. Don't have the same awards year after year
- f. Create certificates from the organization, signed by the organization's leadership

## 2. Staff quotes

Having staff share how volunteers have supported them can be very powerful. Collecting quotes from staff is also a fairly low-impact way to recognize a large group of individuals.

## 3. Certificates from elected officials

Elected officials give out certificates of recognition to their constituents on a regular basis. To do this, you need to determine who will get certificates and request certificates from the elected official approximately 1 month in advance. This technique could be very effective for recognizing individuals based on the number of hours they have contributed to the organization.

## 4. Have clients thank their volunteers

Our clients often convey very powerful messages so having clients thank their volunteers offers an opportunity for volunteers to hear directly from the individuals they are supporting. Clients can thank their volunteers by writing a thank you card to their volunteers. Caveat: This will probably be difficult to coordinate.

## b. After the Event Program

Allow individuals time to meet one another and learn from each other. This informal aspect of the event is very valuable, especially since many of our volunteers work on projects independently and do not often have an opportunity to meet each other.

## 6. Follow up after the event

### **What we did:**

- a. We sent a follow up email after the event thanking the attendees. In addition, a few of the volunteers asked about new projects or other ways to be involved, so any follow up included that information as well.
- b. We tracked each attendee's participation in eTapestry.

### **Recommendations:**

- a. After the event, you want to thank those who attended and ask them if they have any feedback about the event.
- b. You should track their attendance in eTapestry so that we have a record of the interaction.
- c. For individuals who did not attend the event, plan to send them a "sorry we missed you" email that contains images of the event.

### **Other Recommendations**

1. It is important to have as many staff at the event as possible and essential to have leadership there because it communicates the value that CEOW places on volunteers.
2. How to run an event with a small budget

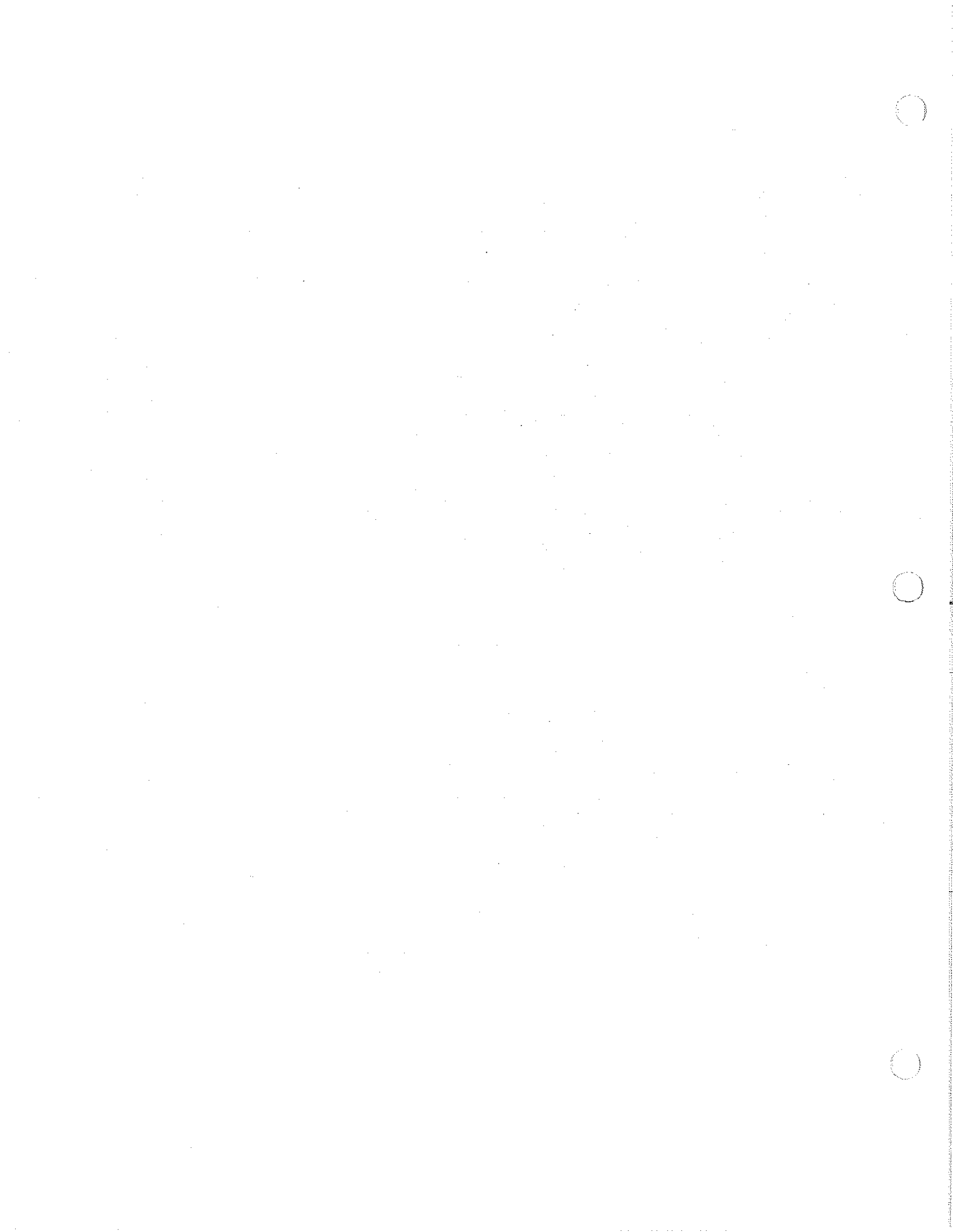
There are many spaces to host events that can be reserved for free. Keeping the cost of the venue low is one of the major ways to keep costs down. You can also get supplies for the event and food donated from Berkeley Bowl, Safeway, Trader Joes and Costco so that you do not have to purchase those supplies. At the very minimum with in-kind donations, you will need approximately \$20 for supplies plus transportation costs for staff.

3. Photographer

This event is a prime opportunity to get pictures of volunteers. The more pictures we have of volunteers the better, so having a photographer (who can be a volunteer too) present to document the event is highly recommended.

## Volunteer Recognition Event 2011 Timeline

Date	Action	Staff
May-July	Invite volunteers	RBC
May-July	Collect RSVPs	RBC
May/June	Request certificates from local representatives for volunteers with a certain level of service	RBC
May-July	Annoucement in eNews	RBC
15-May	Identify venue	RBC
15-May	Solicit donations for food	RBC
18-May	Develop list of volunteer to invite	RBC
24-May	Invite staff to event	RBC
24-May	Set up EventBrite site	RBC
24-May	Post the event on the website	RBC
25-May	Send invitation	RBC
1-Jun	Nominate volunteers for recognition awards	Staff
6-Jun	Develop an event flow document	RBC
15-Jun	Identify a volunteer to speak about their experiences with CEOW	RBC
15-Jun	Purchase plates, utencil, etc.	RBC
22-Jun	Invite clients	RBC
22-Jun	Identify staff to speak at the event	RBC
1-Jul	Pick up certificates for volunteers who have contributed a certain level of service	RBC
1-Jul	Select volunteers to receive the award	RBC
1-Jul	Create a slideshow of volunteers' involvement	RBC
1-Jul	Recruit a photographer	RBC
1-Jul	Event reminder	RBC
11-Jul	Collect donations	RBC
11-Jul	Get music for the reception	RBC
11-Jul	Get a scribe for the event	RBC
13-Jul	Make certificates for award recipients	RBC
18-Jul	Make stewardship lists for staff	RBC
18-Jul	Event reminder	RBC
18-Jul	Create programs	RBC
18-Jul	Create name tags	RBC
18-Jul	Ribbons for client attendees	RBC
20-Jul	Create a sign in sheet	RBC
20-Jul	Print name tags	
20-Jul	Print RSVP list	RBC
21-Jul	Event	RBC
22-Jul	Sorry we missed you emails for those who didn't attend	RBC
25-Jul	Get photos from photographer	RBC
25-Jul	Follow up phone calls for attendees	RBC
	Cake	RBC
	Letter invites?	
	Roses for volunteers?	



## Volunteer Recognition Event Proposed Timeline

Date	Action	Staff
ASAP	Identify venue	
2 months before	Identify recognition technique (award, certificates, etc) and begin implementation	
1.5 months before	Solicit in-kind donations if necessary	
1.5 months before	Develop list of volunteers to invite	
1.5 months before	Invite staff to event	
1.5 months before	Set up EventBrite site	
1 month before	Send invitations	
Up until the event	Collect RSVPs	
1 month before	Invite speakers	
1 month before	Recruit a photographer	
3 weeks before	Invite clients	
3 weeks before	Create call lists for staff to invite their volunteers	
2-3 weeks before	Call volunteers to personally invite them to the event	
2 weeks before	Purchase necessary supplies (plates, napkins, etc.)	
2 weeks before	Develop an event flow document	
2 weeks before	Create a slideshow of volunteers' involvement	
1 week before	Send event reminder	
1 week before	Collect in-kind donations if necessary	
1 week before	Get music for the reception	
1 week before	Get a scribe for the event	
1 week before	Make stewardship lists for staff	
1 week before	Create programs	
1 week before	Create name tags	
1 week before	Ribbons for client attendees	
1 week before	Create a sign in sheet	
Week of the event	Print name tags	
Week of the event	Print RSVP list	
Day of	Event	
Day after	Sorry we missed you emails for those who didn't attend	
Day after	Attendee tracking in eTapestry	
Week after	Get photos from photographer	
Week after	Follow up phone calls for attendees	





Contact [C.E.O. Women \(Creating Economic Opportunities for Women\)](#) for event and ticket information.



## Volunteer Appreciation Celebration

Thursday, July 21, 2011 from 6:00 PM to 8:00 PM (PT)

San Francisco, CA

**This event has ended!**

View current events hosted by [C.E.O. Women \(Creating Economic Opportunities for Women\)](#)

Email
 Share
 Tweet
 Like
 Be the first of your friends to like this.

### Ticket Information

TYPE	ENDS	PRICE	QUANTITY
General Entry	Ended	Free	N/A

### When

Thursday, July 21, 2011 from 6:00 PM to 8:00 PM (PT)

Add to my calendar

### Where

**Sports Basement Grotto**  
1590 Bryant St  
San Francisco, CA 94103



### Other Maps:

[Yahoo](#) | [Mapquest](#) | [Microsoft](#)

### Event Details

Join us to celebrate all of C.E.O. Women's volunteers! At the Volunteer Appreciation Celebration, we will acknowledge our volunteers for your dedication and commitment to C.E.O. Women. Our work would not be possible without the talent, knowledge, skills and passion of our volunteers and we want to recognize your efforts. Light refreshments will be provided.



C.E.O. Women classroom assistants Lena Kolesnikova and Quan Chen at the Spring 2011 Storefront Presentations.

**When:** Thursday, July 21st from 6-8pm

Doors open at 6pm

Recognition ceremony begins at 6:30

Reception to follow

**Where:** Sports Basement Grotto

1590 Bryant St., San Francisco, CA 94103

### Hosted By

#### C.E.O. Women (Creating Economic Opportunities for Women)

The mission of C.E.O. Women is to create economic opportunities for low-income immigrant and refugee women through teaching English, communications and entrepreneurship skills, so they can establish successful livelihoods. C.E.O. Women then provides women with intensive mentoring, coaching and access to capital needed to start a small business.

[View other C.E.O. Women \(Creating Economic Opportunities for Women\)](#)



[SAMPLE ETAPESTRY INVITATION TO THE EVENT]

Dear Rebecca,

C.E.O. Women is hosting an appreciation celebration to recognize volunteers like you! We know our work would not be possible without your knowledge, skills and passion.

The Volunteer Appreciation Celebration will include a recognition ceremony followed by a reception. Join us to celebrate the efforts of all of our volunteers and meet the other talented individuals who support C.E.O. Women.

**What:** A celebration to thank you!

**When:** Thursday, July 21st from 6-8pm

Doors open at 6pm

Recognition ceremony begins at 6:30pm

Reception to follow

**Where:** Sports Basement Grotto

1590 Bryant St., San Francisco, CA 94103

RSVP for the celebration here by July 14th.

Thank you for your continued support. We hope to see you there!

Warm regards,

C.E.O. Women Staff

[SAMPLE REMINDER INVITATION EMAIL]

Dear Rebecca,

It's not too late to RSVP for C.E.O. Women's volunteer appreciation celebration! This Thursday, C.E.O. Women is hosting an event to recognize all of our wonderful volunteers, and we want to see you there! Whether you've volunteered for one hour or hundreds, we want to thank you for your hard work and commitment to helping immigrant and refugee women become entrepreneurs. [RSVP here to save your spot.](#)

**What:** A celebration to appreciate you!

**When:** Thursday, July 21st from 6-8pm

Doors open at 6pm

Recognition ceremony begins at 6:30pm

Reception to follow

**Where:** Sports Basement Grotto

1590 Bryant St., San Francisco, CA 94103

RSVP today!

Thank you for your continued support. We hope to see you there!

Warm regards,  
C.E.O. Women Staff

[SAMPLE EVENT FLOW DOCUMENT]

**C.E.O. Women Volunteer Appreciation Celebration: Thursday, July 21, 2011**

Location: Sports Basement Grotto, 1590 Bryant St, San Francisco, CA 94103

Timeline	Task/Event	Who
4:00	First group of staff leave for venue and take materials (ideally 4) -chart paper -tape -laptop -beverages-snacks -cake -plates, cups, napkins, utensils, tablecloths -programs -nametags, signs, banner -music & CD player	Elinor, Rebecca, Nichole, Joyce?
5:00	First group of staff arrive at venue	
	Hang signs to guide guests & banner (s)	
5:00	Second group of staff leave for venue	Farhana, Margaret, Anita?, Carly?
	Arrange room	
	Set up registration table (nametags, programs) & C.E.O. Women info	
	Arrange food table & beverages	
	Set up music & speakers	
6:00	Volunteers/remaining staff arrive	
	Run registration table & distribute nametags	<b>Nichole</b>
	Invite guests to have some food & beverages	
	Volunteers write their favorite volunteering memory on chart paper	
	Begin slide show, loop	
6:30-6:50	<b>Ceremony</b> 6:30 – Opening & Welcome (Farhana) 6:45 – Client speech (Alena) Closing (Rebecca) Group photos	<b>Quote-Writer: Margaret</b>  <b>Photographer: Elinor</b>
7:10-8:00	<b>Reception</b> Cake? and drinks	<b>Cake cutting: Nichole</b>
8:00 – 8:15	Clean up, breakdown and pack-up	Whole Team
8:30	Return supplies to office	Rebecca

[SAMPLE THANK YOU FOR COMING EMAIL]

Dear Carolina,

It was so great to see you last night! Thank you for coming to celebrate all of the hard work that our volunteers have contributed to C.E.O. Women. I hope you enjoyed the evening and got the opportunity to meet some the inspiring volunteers who support us.

If you have any questions about the organization or the volunteer program, please feel free to reach out to me at any time.

Thank you for all of your support!

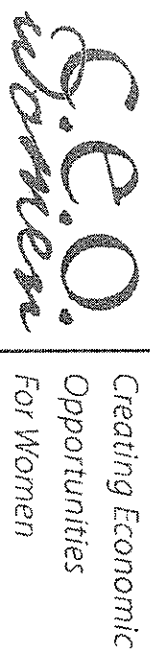
Warm regards,  
Rebecca

lucky to get to work with so many of them. Thank you for everything that you do for C.E.O. Women!!!"  
-Rebecca Beasley-Cockroft, Program Associate

"Volunteers are truly, in my opinion, the best people. Volunteers have an energy that is contagious and a willingness to help that is inspiring. I am constantly amazed by our volunteers' capacity to give. Without the gift of volunteers' time and expertise our organization would not be able to provide economic opportunities for low-income immigrant and refugee women. Thank you so much to all of our volunteers. You are simply the best!"  
-Nichole Kermen, Volunteer and Corporate Engagement Manager

"We have been able to accomplish so many things with the support, expertise and time of our volunteers. From enriching our clients' businesses to producing high quality marketing materials, from interviewing our constituents to providing strategic direction for our organization, they contribute more than just time. Without them, we certainly would not have served over 168 clients already this year. We would not have embarked on a well-timed strategic planning process.

Because of the valuable insight of our volunteers, we survived a tough year. We also grew because of the strength of the support from our volunteers. The foundation and leadership they continue to provide will sustain C.E.O. Women."  
-Anita Dharapuram, Executive Director



## C.E.O. Women Volunteer Appreciation Celebration July 21, 2011

### Ceremony

#### Welcome

Farhana Huq, President and Founder



#### Volunteer Experience

Alena Makarava, C.E.O. Women Client and Volunteer



#### Closing Remarks

Rebecca Beasley-Cockroft, Program Associate



### Reception

**Special Thanks to Our In-Kind Sponsors & Donors:**  
Costco  
Sports Basement

### **About C.E.O. Women**

The mission of C.E.O. Women is to create economic opportunities for low-income immigrant and refugee women through teaching English, communications and entrepreneurship skills, so they can establish successful livelihoods. C.E.O. Women then provides women with intensive mentoring, coaching and access to capital needed to start a small business.

For more information, please visit [www.ceowomen.org](http://www.ceowomen.org)

## C.E.O. Women Staff Thanks You

"Volunteers allow me to teach a group of students who have varying levels of ability with English. Volunteers come into the classroom, sit down next to a student or two and start to build rapport. In time, classroom assistants learn who needs help a little more than others and then work to fill that gap in knowledge. Volunteers have helped run group work and made copies of handouts in a pinch. All of this effort helps me to focus on my classroom teaching, knowing student's needs are taken care. I love seeing the relationship that develops with the students. That's what the volunteers are ultimately here for."  
-Beth Silverstein, Trainer

"Volunteers enable the organization to make sound decisions on our strategy and programs so we can figure out how to have the maximum effect on the largest group of women possible. They challenge us to reconsider propositions, and offer new insights and ways of thinking and looking at solutions to challenges. They pose hard questions for us to think about which makes our programs and organization stronger in the end.

They enable me to build an organization that is beyond me and anything that I could accomplish alone as a person. They buy into our value proposition and treat it as their own. They help plant seeds for this organization to grow and thrive so that it will remain a resource in the community now and into the future.

Many have had a lifetime career in technology, HR, legal services, graphic design. Their skills are highly marketable and without them, we wouldn't be able to run our organization, understand our lease/contract, make pretty postcards for our annual event, research the latest and greatest platforms for setting up ways of communicating with our clients through text messaging programs.

Because of them, the organization has survived a tough economy and funding cycle. Despite, we doubled the women served from 2009 - 2010 and expect we will touch even more women this year.

They offer their perspectives which can differ from yours. They really care about us and about our mission and our women, so they offer their time generously."

-Farhana Huq, Founder and President

"Volunteers help C.E.O. Women build community. From expanding our online networks using social media, to doing graphic design work for our event invitations, to interviewing graduates so we can share their stories, to taking professional-quality photos at client events, volunteers provide us with the tools we need to best communicate our mission and accomplishments to the community. Beyond the hard skills they bring to C.E.O. Women, our volunteers bring a unique and vibrant energy to the organization that is invaluable to our success. Volunteers, thank you for all that you do!"  
-Mikaela Lefrak, Resource and Development Associate

"Our Evaluation Team members volunteer hundreds of hours of their time to help us effectively examine our program outcomes. Their efforts are tremendous – they are the front-line people who tirelessly interview our alumnae, capturing their successes, and noting their challenges. Thanks to our Evaluation Team, C.E.O. Women is able to share compelling program impact stories and statistics with all of our stakeholders. Deb and Joyce are energetic, fun to work with, incredibly patient, and talented interviewers! Thank you!"  
-Elinor Mattern, Assistant Director of Programs

"Volunteers are truly inspiring people. They choose to dedicate their free time to helping those in need when most others wouldn't. I am inspired by the passion and motivations that our volunteers have to help our clients. They understand the incredible adversity that immigrant women face in a new country where they are unfamiliar with the language, laws, culture, food, and people. Our volunteers are instrumental in ensuring that these women are able to find the resources available at C.E.O. Women. Without them, we may not have been able to reach the thousands of immigrant women that we have."

-Margarett Ly, Training Associate

"My volunteers are amazing! They have such a range of backgrounds, giving C.E.O. Women the diversity of perspective that is essential to our success. With their help, the volunteer program is continuing to grow, we are reaching new communities of women, our communications efforts are growing, and our current clients get specialized business support. Their passion, humor and willingness to take on anything make them such an incredible asset and I am

## **Guide to Re-engaging Volunteers**

The re-engagement process refers to the ongoing process of asking our active volunteers to volunteer with the organization again. Re-engaging volunteers is about building lasting relationships between the volunteer and the organization as a whole. Our re-engagement efforts should focus on deepening a volunteer's relationship with the organization while giving them more perspective on our work. In addition, re-engagement allows CEOW to continue to tap into a volunteer's skill set without needing to invest time in the initial general training, since that is something the volunteer has already been through. This in turn increases our productivity as an organization.

Re-engagement also has the added benefit of generating regular contact between a volunteer and CEOW, which leads to an increased likelihood of conversion into a donor.

### **How to Re-Engage Volunteers**

#### **1. Volunteer recruitment**

As part of the volunteer recruitment process for a new volunteer position, we should tap into our current pool of volunteers. This offers the opportunity to engage our volunteers with a specific volunteer position, which is the strongest way to continue to build a relationship with our work. It also has the potential to create connections between the volunteer and a new manager, which creates a tie between them and not just one individual on staff. In order to engage volunteers through volunteer recruitment, we should:

- a. Advertise the volunteer opportunity in the monthly eNews (and the volunteer newsletter if timely – see section 2 for more information)

If there is sufficient lead time for the volunteer opportunity, this allows us to share information about the opportunity and give our volunteers the chance to choose that position. That choice also allows volunteers to take on different types of volunteer positions.

- b. Ask staff for volunteer recommendations

Staff will have a good sense of their own volunteers and therefore are a great resource to tap into in the recruitment process. On a similar note, if there is a trusted volunteer who has held a similar position, ask them for recommendations as well.

- c. Send personalized emails (there is a sample below)

Many of our volunteers have expressed specific interest in certain types of positions, and we have tracked that information in eTapestry. As part of the re-engagement/recruitment process, we should send individual invitations to the volunteers who have expressed an interest in a position similar to the one for which we are recruiting a volunteer. Before sending these emails however, make sure to check in with the volunteer's steward to make sure we are not over contacting them. Once you send these emails, make sure to record your communication with them in eTapestry. This way we have a record of how recently a volunteer has been contacted, what they've been contacted about and what their response was.

## 2. Volunteer Newsletter

Volunteers want to feel like they are connected to CEOW and part of the organization. As a way to build a community of volunteers and have a well informed community, a volunteer newsletter, separate from eNews, should be sent regularly.

### a. When to send the newsletter

In order to be an effective newsletter, it should go out regularly. In the near term, it should go out twice a year, but as the volunteer program grows, this newsletter should go out once a quarter.

Based on our current communications calendar, the newsletter should go out on the fourth Wednesday of the month in January and July. For the quarterly schedule, the newsletter should go out in January, April, July and October.

### b. What to include in the newsletter (there is a sample below)

The newsletter should give our volunteers an inside view of the organization. Think of this a mini annual report with a focus on the volunteer community's contribution to the organization. Include the following components:

- i. What is new with the organization
- ii. What volunteers have done to support CEOW since the past newsletter
- iii. Upcoming volunteer opportunities
- iv. A volunteer spotlight

- v. Volunteer resources
- vi. Reminder to log volunteer hours
- vii. Upcoming CEOW events
- viii. Ways you can help right now
- ix. Thank you for volunteering

c. How to send the newsletter

The newsletter should be sent through eTapestry, since that is where volunteer information is managed. Use the existing template for this newsletter, located in the Volunteer Communications category (Volunteer Newsletter: July 2011).

For more information on how to create and send emails in eTapestry, see \\Ceowserver2003\share\ORGANIZATION\C.E.O. Women HOW-TOs\DATABASE & EVALUATION\eTapestry\CHEAT SHEETS\Cheat Sheet.Create and Send Emails

It is important to make sure that the messaging for this newsletter is consistent with CEOW's communications in general, so make sure to coordinate with the Development Team about messaging.

### 3. Volunteer orientations

Volunteer orientations are a great opportunity to re-engage volunteers. As part of the orientation communications, you want to include an invitation to current volunteers to come to a volunteer orientation (for more specifics on orientation communications, see the Guide to Orienting Volunteers, part 3). In addition, you want to invite a few volunteers to speak at the orientation about their volunteer experiences. This allows prospective volunteers the opportunity to learn directly from current volunteers, while giving current volunteers an opportunity to support the organization. (Also, current volunteers tend to be flattered by the invitation).

For more specific information on how current volunteers can re-engage as speakers at a volunteer orientation, see the Guide to Orienting Volunteers.

### 4. Invitations to Storefronts

Storefronts are a powerful event that many volunteers enjoy. Because so many volunteers are looking to interact directly with our clients, it is important

to invite volunteers to Storefronts on a regular basis. This helps them continue to connect with the women CEOW supports and not just their project manager.

If the volunteer is not currently working on a project, be prepared to offer them a project after they attend Storefronts, since they will be freshly energized about CEOW.

#### 5. Have a conversation with your volunteers

Some volunteers are looking for different projects, but they do not know what those projects could be. It is important to have a conversation or send an email to volunteer occasionally (once a year approximately) to find out if they are still enjoying their project, would like to repeat their project, or want to do something entirely different. This is a more pro-active approach to re-engagement, instead of waiting for a volunteer to respond to a volunteer announcement in eNews or the Volunteer Newsletter.

#### 6. When to re-engage volunteers

To avoid burnout, we do not want to contact our current volunteers too often. We should contact volunteers a minimum of once a year to see if they want to take on a new position, and a maximum of once a quarter.

[SAMPLE PERSONALIZED EMAIL TO RECRUIT/RE-ENGAGE A VOLUNTEER]  
Hi Wickey,

I hope all is well! I'm writing today because on your volunteer sign-up sheet at the volunteer orientation, you expressed an interest in our classroom assistant position. We are currently recruiting classroom assistants and I wanted to find out if that is something you are still interested in. You can read about the position here:

[http://www.ceowomen.org/index.php?option=com\\_content&task=view&id=411&Itemid=112](http://www.ceowomen.org/index.php?option=com_content&task=view&id=411&Itemid=112)

If you have any questions, let me know and I can let you know what the next steps are if you are interested.

Warm regards,  
Rebecca

[SAMPLE EMAIL INVITING A VOLUNTEER TO SPEAK AT AN ORIENTATION]

Hi Melanie,

I hope you are well! I'm writing today to find out if you would be interested in speaking at the volunteer orientation. Elinor recommended that I reach out to you based on your experiences as a C.E.O. Women volunteer and I believe you would provide a valuable perspective for prospective volunteers.

The orientation is on October 5th from 6-7pm at our office in Oakland and it would consist of talking briefly about the following:

- Why you first got involved with C.E.O. Women
- What you did as a volunteer with C.E.O. Women
- What you learned from your volunteer experience
- Advice you have for new volunteers

Please let me know if that is something you would be comfortable doing. We'd love to have you participate if you are available/interested.

Warm regards,  
Rebecca Volunteer Newsletter



Rebecca Beasley-Cockroft &lt;rebecca.ceowomen@gmail.com&gt;

## C.E.O. Women Volunteer Newsletter

1 message

rebecca@ceowomen.org &lt;rebecca@ceowomen.org&gt;

Mon, Oct 17, 2011 at 10:21 AM

To: rebecca@ceowomen.org



Creating Economic  
Opportunities  
For Women

### Volunteer Newsletter, July 2011

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#### Upcoming Events

Volunteer Orientations:  
[Oakland](#)  
When: August 23, 2011  
6:00pm to 7:00pm  
Where: 405 14th St., 2nd floor  
Oakland, CA 94612

#### [San Jose](#)

When: August 25, 2011  
6:00pm to 7:00pm  
Where: 111 W. St. John St.,  
#410  
San Jose, CA 95113

Come learn about C.E.O.  
Women and how volunteers fit  
into our organization. To  
RSVP, email  
[rebecca@ceowomen.org](mailto:rebecca@ceowomen.org).

#### [Global Marketplace](#)

When: October 26, 2011

#### Dear Friends,

In 2011, our focus at C.E.O. Women has been on the community impact of our work - how each woman we train has the tools to improve not only her life, but also the health of the greater community in which she lives. Our volunteers magnify our impact when they step in and support our clients, and so we want to make sure you can learn about the exciting ways you can continue to support C.E.O. Women.

To do that, we are launching this volunteer-focused newsletter to keep you in touch and informed. We will include the most recent news from the organization, how volunteers have helped us since the previous newsletter, upcoming opportunities to get involved and more.

Thank you for all of your support and we look forward to continuing to work with you!

Warm wishes,

Rebecca Beasley-Cockroft  
Program Associate and Volunteer Coordinator

#### C.E.O. Women at a Glance



5:45pm to 8:00pm  
Where: Fort Mason Center  
San Francisco, CA

We are hosting a festival featuring international cuisine, live Brazilian music, and the latest display of immigrant women's entrepreneurship in the Bay Area. [You can buy tickets here.](#)

### Log Your Volunteer Hours

A friendly reminder to all of our volunteers to fill out your monthly volunteer log. These logs allow us to track the progress of our volunteer program and provide you any support that you may need.

[Fill out the volunteer hours log here.](#)

### Quick Links

[Our Website](#)  
[Donate Now](#)  
[Contact Us](#)



*C.E.O. Women staff at our June Storefront Presentations Event*

The beginning of 2011 has been all about growth for us. We launched our Women Connected alumnae programming in the South Bay, starting with our coaching program and then continuing with our first San Jose workshop hosted by our client and volunteer Alena Makarava. Our team has also been growing and we now have a full-time staff of five, including our new Small Business Advisor, Carly Perera, and our Trainer, Beth Silverstein.

Thanks to the support of our phenomenal volunteers, we completed another semester of classes in both Oakland and San Jose while launching our recurring donor campaign, OHANA.

Over the summer, we take a break from the classroom to plan for the upcoming fall semester and conduct our bi-annual client outreach campaign. We are also in the process of our annual evaluation survey to determine the impact of our programs for clients who received 10 or more hours of service. These clients were the first to use our educational DVD, Grand Café, as a learning tool. We are excited to learn how the inclusion of this groundbreaking series has affected our program results. Through the survey process, we have discovered that one of our clients, Maria Ponce Neetzel, has recently launched her restaurant, Salsa Verde Mexican Cuisine in Concord!

A round of business coaching is also underway this summer and we are excited to see our clients continue to move forward with their businesses as our volunteer coaches guide them.

Coming up, we have our fall classes beginning in September and our annual Global Marketplace event on October 26th. We hope to see you involved in both!

### Volunteering Highlights

In May, we asked you for feedback on our volunteer program. We were excited to learn that our volunteers are having a positive experience with the organization.

As part of that survey, we asked you what the best part of volunteering with C.E.O. Women was. Here is what you told us:



Business Coach Jill Arrington has taken on a variety of volunteer roles with C.E.O. Women. According to her, the highlight of her volunteer experience has been "helping the women accomplish their goals of gaining web presence and/or making a quality decision to focus on their family." When coaching our clients, she focuses on helping the women "understand that the coaching session is about meeting their needs - whether within or outside the scope of

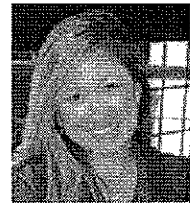
their business."

"The best part is knowing that my support is invaluable to an organization I am eager and honored to help!" says long-time volunteer and Board Member Lauren Cosulich.



Selina Rojas was a Classroom Assistant for our Spring 2011 Starting a Small Business class. For her, the best part of volunteering was "watching the transformation of the students!"

Carolina Yu joined C.E.O. Women's volunteer corps in April of 2011 as the Graduation Event Planner. "I enjoyed interacting and hearing the success stories of the immigrant women entrepreneurs and I think the C.E.O. Women staff are such a pleasure to work with," says Carolina about her volunteer experience.



We look forward to continuing to create these memories with you as you support our mission. If you'd like to share the best part about your volunteer role, please do so on our [Facebook page](#). We love hearing from our volunteers!

### 2011 Quick Facts about Volunteers

- Volunteers have contributed more than 800 hours of time this year
- Over a third of those volunteer hours have been in the classroom
- Our volunteer evaluation team has interviewed 33 clients in the past month for our annual program evaluation survey
- Volunteers have put on 3 workshops for our alumnae so far this year
- In January, volunteers called over 200 prospective clients about upcoming orientations

### Upcoming Opportunities to Volunteer

If you are looking for a new volunteer role or you absolutely loved your last position, here are our newest opportunities to get involved:

- Classroom Assistant - help our students by providing logistical and one-on-one support in the classroom
- Client Interviewer - interview our clients over the phone about their backgrounds and businesses
- House Party Host - host a party for your friends to help spread the word about the important work C.E.O. Women is doing

- Photographer - take pictures of our clients and at our events
- Workshop Presenter - share your business acumen with our alumnae by presenting a workshop in an area in which you have expertise

You can find a complete list of our current volunteer opportunities here. If you have any questions, email [rebecca@ceowomen.org](mailto:rebecca@ceowomen.org).

The mission of C.E.O. Women is to create economic opportunities for low-income immigrant and refugee women through teaching English, communications and entrepreneurship skills, so they can establish successful livelihoods. C.E.O. Women then provides women with intensive mentoring, coaching and access to capital needed to start a small business.

## **Guide to Cultivating Volunteers**

Volunteers are a unique segment of our stakeholders because of their direct connection to and interaction with CEOW's work. This connection makes them strong candidates for donor cultivation. In addition, research on volunteerism shows that volunteers on average donate almost twice as much money as nonvolunteer donors.

Because volunteers are more likely to donate, it is an efficient use of our cultivation time to ask volunteers to donate. While the strategy for cultivating and stewarding volunteers is similar to that of nonvolunteer donors (for more information about making an ask, see \\Ceowserver2003\share\ORGANIZATION\FUNDRAISING\4-INDIVIDUAL DONORS\ASKING\ How to ask for a gift 20110907 FH v.1), the following is an overview of the cultivation process for volunteers and recommendations for future cultivation efforts.

### **How volunteers are currently solicited for gifts**

1. As part of the screening process, volunteers are added to our enewsletter list in eTapestry. This automatically includes them in the pool of individuals who will receive e-solicitations.
2. Once a volunteer is converted from Prospective to Active status in eTapestry, they are then rolled into Development's solicitation process.
  - a. All active volunteers receive a direct-mail solicitation letter, unless they have already given within the past year.
  - b. In the letter, we include a line about their most recent volunteer activity.
  - c. After sending the letter, the volunteer's steward has followed up with a personal phone call when possible. The steward is the individual (usually a staff member) who has the strongest relationship with the volunteer (not necessarily the volunteer's manager).
3. In coordination with Development, we have also set up in-person asks with volunteers, as we would with nonvolunteer donors or prospects.
4. The stewardship of high level donors who volunteer (Board members, Development Council, Advisory Council, etc.) follows a different process that is managed by Development.

## **Recommendations for how to solicit gifts from volunteers**

1. As part of the screening process, volunteers should continue to be added to our newsletter list in eTapestry, thus automatically enrolling them into the pool of individuals who receive e-solicitations.
2. Once a volunteer has completed their first volunteer project (approximately 6-12 months after their initial contact with CEOW), we should set up a personalized ask of \$50. To do so, we should follow this procedure:
  - a. Send an email to ask for an in-person meeting.
  - b. Schedule and hold an in-person meeting. If an in-person meeting is not possible, it can be substituted with a phone call.
3. Once a volunteer gives their first gift, we should research their giving capacity
4. Direct-mail solicitation letters should go out to all volunteers who have completed at least one project (unless they have already given within the past year).
  - a. In the letter, we should continue to include a line about their most recent volunteer activity. Maintaining the volunteer tracking system is very important to ensuring this process is easy and streamlined (for more information about volunteer tracking, see the Guide to Tracking Volunteers).
  - b. Each letter should have a personal note written on the letter from the volunteer's primary steward.
  - c. If the volunteer has not yet given, we want to include a lower ask level for volunteers to encourage a first gift (approximately \$50).
  - d. It would be ideal to have a volunteer steward follow up with each volunteer who has been solicited to encourage giving with a phone call within two weeks of the solicitation.
5. When inviting volunteers to Global Marketplace or other fundraising events, have a volunteer invite their peers. Volunteers make very compelling fundraisers because their commitment is completely focused on helping the organization achieve its mission.
6. Re-engagement efforts to continue to involve an individual with the organization as a volunteer are also important cultivation efforts. For more

information about volunteer re-engagement, see the Guide to Re-engaging Volunteers.

### **Who solicits volunteers for gifts**

Volunteer cultivation is very personalized, like all donor cultivation. In general, the volunteer's manager holds the relationship with the volunteer. As a result, the volunteer's manager should be the individual making the ask.

Individuals who are prepared to make asks include staff, the Board and trained "steward" volunteers.

### **Cycle for volunteer giving**

Before asking a volunteer to give, we want to ensure that they have developed a strong tie to the organization. In general, the cycle for volunteer giving follows this pattern:

1. Volunteer contacts the organization
2. Volunteer comes to an orientation or event that serves as an orientation
3. Volunteer takes on a position
4. Volunteer completes position
5. Volunteer is asked to give a small amount (\$50)
6. Volunteer gives a gift
7. Volunteer's giving capacity is researched
8. Volunteer is asked for an increased gift the following year, depending on their giving capacity.

### **How volunteers differ from regular donors**

1. Volunteer donors have multiple roles at the organization and so it is important to maintain clear divisions between those roles. Asking individuals to volunteer with CEOW must be separate from asking individuals to donate.
2. Excluding Board members and the Development Council, CEOW's volunteers are lower level donors

3. We have more opportunities to do individualized asks because of the relationships that build between volunteers and their managers
4. Donors who aren't volunteers have fewer relationships with staff members
5. We try to get donors to become volunteers as a way to deepen their connection with the organization and spread relationships across staff
6. We use volunteerism as a way to cultivate potential donors

[SAMPLE LETTER ASKING FOR A FIRST GIFT]

Hi Rafael,

I hope this finds you well. I hear that you will be volunteering at our event again this year - it'll be great to have you again.

Things have been going well over here - we have celebrated a few grand openings of our clients' businesses this summer, which was wonderful. Now we are focusing a great deal of our energy on Global Marketplace, which in my opinion is going to be our best event yet!

I wanted to personally let you know that we are so grateful to have had your participation and time as a volunteer. Your contributions have helped us tremendously to build a strong volunteer program and run successful events. Since you have been a supporter of our organization, I wanted to see if I could speak to you about making a personal financial gift to support the work of C.E.O. Women this year. We would love to have you join our OHANA, our monthly donor program. A gift as small as \$10 a month makes a lasting impact on our work (plus, you get an awesome gift made by one of our graduates). I would be happy to meet with you at a place that would be convenient for you to discuss more. Please let me know if you would be open to meeting.

Thanks and I look forward to hearing from you,

Mikaela

