Tips for AFI Project Staff on Working with Volunteers

1) Identify the need/goal for the volunteers.

- In order to select the most helpful volunteer guest speaker, facilitator, or mentor, it is important to determine why you want them to participate and what your AFI project would like them to accomplish. Understanding the anticipated role of the volunteer will help you to select the best person for the job.

2) Locate the volunteers.

- Talk with co-workers or individuals from partnering agencies in the community—they may already work with helpful volunteers or have suggestions for finding potential volunteers. You can also use the organizations identified in this tip sheet as a starting place to find volunteers.
- Do your homework before contacting the potential volunteers—find out about their knowledge of the topic and if they have experience providing training, facilitating groups, or mentoring individuals. You will also want to find out about their experience in working with people with low incomes or limited resources.
- Prepare guest speaker, facilitator, and mentor job descriptions including volunteer duties, responsibilities of the AFI project staff, and an estimated time commitment requested.

3) Prepare the volunteers for their roles.

- Develop a packet for the volunteer that includes background information on your IDA project, the purpose of the financial education training course and the particular session for which they are volunteering, the outcomes and competencies you expect participants to achieve as a result of the session, and an outline for the session. You may also want to include a general profile of the project participants, including their level of knowledge about money management and savings goals. Be sure to keep the information general.

- Meet with the volunteer at least once prior to the session to review expectations, ensure he/she understands the objectives and his/her role, answer any questions, and determine any handout or visual aid requirements. Also, spend time discussing the needs of the learners and the overall philosophical approach to the training. "It is based in the principles of adult learning which are…"

- At least 3 to 4 weeks before the session, send the volunteer a letter of confirmation that includes the training session date, the session objectives and competencies to be achieved, any handouts or visual aids you may have agreed to develop, and logistical information.

- Call the volunteer 7 to 10 days before the session to ensure they have everything they need to succeed in their volunteer role.

4) Follow-up with your volunteers after the session.

- Volunteer guest speakers, facilitators, and mentors are donating their time, talent, and expertise. Give them recognition for the help they provide. Be sure to send a thank you note. You may also want to include a summary of the session evaluations if you had participants complete them. Be sure the evaluation summary is balanced if there is a lot of critical feedback—a volunteer feeling bad is not a good outcome. Recognizing volunteers in your organization's newsletter or on your website are other public ways to say "thank you for your time."

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