**Prospective EFS Volunteer Conversation Guide & Email Templates**

***<<Please refer to Annex 1 for email templates to send before and after the conversation.>>***

*This guide seeks to provide guidelines for Volunteer Hub volunteers and Hub or TAG Leads in their first conversation with a prospective volunteer. This first conversation aims at getting to know them and their interests, providing an overview of EFS and available opportunities, seeing where they may fit and answering any questions they may have.*

Prior to the call, in the invitation email, the prospective volunteer would have received info pack about EFS,so there’s no need to go through it all on the call.

**Intro**

| 1. Hi XXX, how are you? Thank you for taking the time to chat

My name is XXX and I'm part of the volunteers hub at EFS, and this conversation is for us to:* get to know each other a bit better
* introduce you to EFS and the different volunteering opportunities
* find out a bit more about you and where and how you can potentially fit in a way that will benefit both you and the movement.
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**Based on the flow, you can either ask the prospective volunteer about themselves (3) or present yourself first:**

| 1. A little bit about me:
* time with EFS,
* what I do here,
* how I got involved,
* what is my background,
* what I like about it.
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| 1. A bit about you:

**Examples of the sort of questions you might want to ask to assess fit:*** Could we start by you giving a brief introduction of yourself and what have you been doing?
* What prompted you to make contact?
* What is it you’re hoping to get out of this experience?
* What are your top strengths or interests and what are the areas you would like to improve on?
* What level of commitment in terms of time are you able to give? \*Mention **Flexibility - step in/out/around:** Based on one’s situation, availability and the the understanding that it may change\*.
* What (if any) skills or knowledge are you hoping to acquire because of your involvement?
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**Presenting the Hubs and hearing thoughts and questions:**

| 1. As you have received the info pack in advance of the call, it’d be great to hear you thoughts, if you have any questions and if there’s a specific area that piqued your interest.

<<Allow room for questions>>I am happy to walk you through the structure of the core team, who’s who and what each hub does (please refer to [Hubs doc](https://drive.google.com/file/d/1qYbgN4RZeWpN2eoFDWoGxuZFKKSVSgQh/view) if needed, which was also shared with prospective volunteer in advance as it includes info about the core team). |
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**Next steps**

| 1. Thanks for your time today and your interest in joining the movement.

We will have a chat with [relevant hub lead] and get you connected. We will be in touch within the next week or so, please don’t hesitate to get in touch if you have any questions.Note: EFS volunteer hub to be in charge of the next steps.Hagit: It makes sense to me the next step will be a call with the hub/TAG lead that will also be in charge of (unless joining the volunteers hub, and in this case the volunteer hub partner doing the call will do that):* Add the person to slack - explain what slack is briefly and welcome them on slack on both the core team and relevant hub channel, and encourage them to intro themself on the the #intros channel
* Send the core team calendar invite and encourage them to join - explain about the meeting.
* Send the hub meeting calendar invites and encourage them to join.
* Add to hub’s shared drive, if relevant.
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**Annex 1:** **volunteer@engageforsuccess.org** **Mailbox Email Workflow**

1. **UPON RECEIPT OF FIRST ENQUIRY - reply within 48 hours of receiving**

Hi XXX,

Thank you for showing an interest in Engage for Success.

I would like to acknowledge that we've received your message and are delighted that you're interested to join this dynamic movement.

One of the Volunteers Hub team will contact you [in the next days / early next week / in the next weeks / by the end of the month] to arrange a suitable time to have a chat.

Best regards,

XXX

1. **ARRANGING THE CALL. To be sent by the person assigned to the call:**

Hi XXX,

Following on from the last email, it’d be great to schedule a time to speak about you joining Engage for Success.

This is meant to be a friendly chat for us to get to know you better and talk through the different opportunities to get involved in EFS.

Ahead of our chat, it may be useful for you to check out some info about the movement, our structure and how a volunteer might get involved:

<https://engageforsuccess.org/volunteers-zone/>

<https://engageforsuccess.org/volunteers-zone/be-part-of-the-movement/>

<https://engageforsuccess.org/get-involved/>

We can talk through your questions on our call.

[Suggest a few slots or ask them to suggest a few slots, aim for 45 minutes - 1 hour call]

Warm regards,

XXX

1. **AFTER THE CALL - Follow-up email summarising what we discussed and agreed (without over-promising)**

**ACTIONS:**

1. **Send a follow up email to volunteer (Below) to summarise the discussion and what you agreed.**
2. **Inform the Hub or TAG leads that you have spoken with someone who might be interested and suitable to join their team.**

**After they give permissions for their data, add them on SLACK & CAPSULE CRM,**

1. **Ask Jo D to add them on Slack.**
2. **Invite them to relevant # channels on Slack (#hub-xxx, #general, #random, #teammeetings, #commslearnings, etc.)**
3. **Ask the volunteer to post a short bio in #teamintros channel on Slack**
4. **Add each new prospective volunteer to Capsule CRM with an activity log (e.g. paste the email trail)**
5. **Load their name, email, phone details on Capsule CRM**
6. **Tag them in Capsule CRM with Volunteer Newsletter (for News BriEFS), the relevant Hub and Core team, or other relevant function**
	1. Capsule CRM EfS | *https://engageforsuccess.capsulecrm.com/login* | engageforsuccess | 9b@RqW3Q1UjW
	2. you'll be logged in as Jo Dodds
7. **(Remind the Hub or TAG Lead to update the volunteer details in Capsule CRM.)**

**SEND EMAIL AS A FOLLOW-UP**

**A) IF Agreed on a potential suitable hub and/or role**

Hi XXX,

Following on from our call, it was great speaking with you and getting to know you better. I am delighted that you are interested to support Engage for Success.

As we discussed, I will pass on your details to the XXX hub lead, for them to discuss potential involvement in the XXX activity.

I’m also sharing our Welcome Pack (attached PDF) and am happy to respond to any questions you may have.

Before we fully on-board you as a volunteer at Engage for Success, kindly confirm the following:

a) you give permission for us to add your contact details to the EFS volunteers database?

b) you give permission for us to add you to our EFS Slack community?

c) you opt-in to receive the Volunteer News BriEFS newsletter? It's a newsletter by volunteers, for volunteers, about volunteers. For GDPR, please confirm that you agree to be added to this distribution list. You can unsubscribe at any time and you can find the Engage for Success [Privacy Policy here](https://engageforsuccess.org/privacy-policy).

d) would you like to share your phone number for the database, in case a co-volunteer from the movement would like to connect with you?

e) is xxx@xxx.xx.xx your preferred email address? You might prefer to use a non-work email to sign up to the movement, to stay in touch in case you leave your company or change email addresses. This email will be the login for Slack, it will be visible in your Slack profile and stored in our Volunteers database.

In the meantime, please

* join your local EFS Area Network, [here’s a link to the page](https://engageforsuccess.org/local-thought-action-groups), with the Area Network Ambassador details.
* sign up to the weekly Engagement Matters newsletter here: [EFS Newsletter.](https://engageforsuccess.org/our-newsletter)
* keep your eye on the [Calendar Page](https://engageforsuccess.org/events) for EFS events taking place online or near you.

Don’t hesitate to contact volunteer@engageforsuccess.org if you have any questions.

Welcome to Engage for Success,

XXX

**B) IF There are no suitable opportunities for them right now.**

**OR**

**C) IF Candidate may not have the right skills/ fit/ motivation/ time**

Hi XXX,

Following on from our call, it was great speaking with you and getting to know you better. I am delighted that you are interested to support Engage for Success.

I was really impressed with your XXX. Though we don’t have openings right now, you can get involved right away by joining the XXX Area network. Here’s a link to their page, with the ambassador details: *Relevant link.* Also, sign up to the weekly Engagement Matters newsletter here: [EFS Newsletter](https://engageforsuccess.org/our-newsletter). Keep your eye on the [Calendar Page](https://engageforsuccess.org/events) for EFS events taking place online or near you.

These are great ways to get involved in the movement locally, hear what’s going on in EFS, meet new people, join the conversation, and to find opportunities as they come up.

Even if you don’t hear from us for a while, stay in touch with the Volunteers Hub by dropping us a line once in a while to keep us updated about your interests and availability. As a movement staffed entirely by volunteers, things and people change all the time.

OPTIONAL: I’m also sharing our Welcome Pack (attached PDF) and am happy to respond to any questions you may have.

Before we on-board you as a volunteer at Engage for Success, kindly confirm the following:

a) you give permission for us to add your contact details to the EFS volunteers database?

b) you opt-in to receive the Volunteer News BriEFS newsletter? It's a newsletter by volunteers, for volunteers, about volunteers. For GDPR, please confirm that you agree to be added to this distribution list. You can unsubscribe at any time and you can find the Engage for Success [Privacy Policy here](https://engageforsuccess.org/privacy-policy).

c) would you like to share your phone number for the database, in case a co-volunteer from the movement would like to connect with you?

d) is xxx@xxx.xx.xx your preferred email address? You might prefer to use a non-work email to sign up to the movement, to stay in touch in case you leave your company or change email addresses.

Welcome to Engage for Success,

XXX

**FAQs About Conversation Guide**

**Why do we have a Conversation Guide?**

*VL WROTE: To* ***save time*** *and to create a* ***consistent approach*** *to prospective volunteers, we’ve created this conversation guide and the email templates (Annex 1). By having a guide and template we don’t need to reinvent the wheel every time we have a new contact. This guide is* ***easy to follow, to reproduce and to practice****, as well as to flexibly* ***change and adjust****. A standardised guide helps the Hub to maintain some* ***continuity****, since different members of Volunteers Hub will deal with new contacts at different times. It’s important to make a good first impression and a positive experience for prospective volunteers, while saving time and effort for Volunteers Hub ‘interviewers’.*

**Does everyone who applies become a volunteer?**

*VL WROTE: Not every person who applies is automatically assigned to a role, so* ***we should be careful to not over-promise****. Our role in the Volunteers Hub is to screen and connect prospective volunteers with the areas where they can be most inspired and can benefit the movement.*

*We should be mindful about managing expectations and not creating a ‘rod for our own backs’, while keeping good candidates warm and engaged.*

1. *we might not have suitable opportunities for their interests at the time when they’ve approached us,*
2. *they might not have the right skills, be the right fit or have the right motivation,*
3. *regardless of the opportunities, we should steer every prospective volunteer to join their local Area Network and sign up to the newsletter and podcast,*
4. *if a volunteer seems suitable for a Hub or for a role, discuss with the Hub Leads. It will be up to the Hub Lead to make ‘an offer’ and on-board the volunteer (with our help),*
5. *we are here to facilitate the recruitment and onboarding processes but we cannot assign a person to a hub or to a role - the Hub or TAG Lead should do that.*

*LET’S CONTINUE TO DISCUSS HOW WE INTERACT, ENGAGE, TREAT AND MANAGE PROSPECTIVE VOLUNTEERS*

**How do we know which hub has what requirements and how can we efficiently match the skills of the person we are talking to with our requirements?**

*VL WROTE: As there are only 3 other hubs, plus Volunteers Hub, it should be fairly straight-forward to understand the other Hubs’ or TAGs’ requirements. There just needs to be an* ***ongoing dialogue between the Hubs****.*

**Why don’t we create templates to capture role opportunities from Hubs and TAGs?**

*VL WROTE: Let’s evolve the processes as we learn and expand. At the time of writing this, the organisation was not too big - 4 Hubs, each with 2 co-leads. If we make the process too formal or templated, there is a chance that Hub Leads won’t use it - the adherence to a process will likely be inconsistent or will fade.* ***Let’s keep it simple.*** *The Volunteer Hub’s role is to have the conversations and to keep our fingers on the pulse of the movement’s requirements. The best approach is through regular conversations, through the Core Team meetings, through Slack interactions, etc. We should make it part of our routine to chat with Hub Leads about recruitment and onboarding. Let’s promote the use of* *volunteer@engageforsuccess.org* *inbox and Slack channels for communication and* ***make ourselves visible and easy to reach*** *as active members of the Core Team.*

**How do we make an offer of a role?**

*VL WROTE: Either Volunteers Hub or one of the other Hubs or TAGs can use an email to confirm the ‘appointment’ or to welcome a prospective volunteer to the movement.*

*This is about managing expectations.* ***We should be careful to not make offers on behalf of the other Hubs.*** *We should find a way to keep people engaged and connected to the relevant contacts in EFS, but it’s not our role to ‘appoint’ except into the Volunteers Hub. The way the devolved movement is structured, the Hub Leads and TAG Chairs have the freedom to speak with and select the volunteers who might like to work with them.*

*We can point the candidate to a role, if one exists and share their contact details with a hub lead. We should also be clear that a volunteer can always switch between the hubs and the roles if they want to develop their skills in some other area or if they are not enjoying the work they are doing. In fact, let’s encourage this ‘cross-pollenation’.*

*Use the email template to respond + make necessary amends.*

**What do we do after that follow up initial email?**

*VL WROTE: We should send an email to thank them for their time, summarise what was discussed or agreed and share links to relevant information. Definitely can share the Induction Pack or ‘Welcome Pack’. See the Actions in 3. AFTER THE CALL (above in Annex 1).*

**Should we share the Welcome Pack with everyone?**

*VL WROTE: YES! Induction Pack/Welcome Pack or Volunteer Zone on the website + video of David & Nita welcoming volunteers is fine to share with everyone who has expressed an interest to volunteer.*

**Who asks for a Slack Invitation for new joiners?***VL WROTE: If a volunteer joins one of the other Hubs, that Hub’s Lead should send a request to Jo Dodds. Or we do it for them. Just agree who does what.*

**Who sends an invitation to recurring meetings?**

*VL WROTE: The Hub Lead where the candidate has found their opportunity should do this.*

**Who adds candidates and new recruits to Capsule CRM?**

*VL WROTE: Capsule CRM is the database or Relationship Management system that we use for EFS volunteers. It’s a very easy system to use.*

*If someone from Volunteers Hub onboards a volunteer, or if we are involved in onboarding the candidates with other Hubs, we should add prospective and new volunteers to Capsule CRM. Otherwise, it might not get done.*

*If a TAGs Hub Leads onboards the person, they should upload the volunteer’s details.* ***Ask Jo Dodds or the Volunteers Hub Lead for access to Capsule CRM. ‘****Tagging’ each volunteer with the areas where they will get involved (and add ‘Volunteer Newsletter’ tag to add them to the distribution list) is essential to maintain clean data.*

**Is this Conversation Guide set in stone?**

*VL WROTE: This is a working document and we can make changes and be flexible as necessary.*

*Volunteers Hub’s role is evolving, so everything is open to discussion. We can’t do everything, so it is a collaborative process with the other Hub Leads and TAG Chairs. Volunteers Hub’s resources, capabilities and capacity should be considered when agreeing what we should/shouldn’t or can/can’t do.*