



Regional Council Volunteer Roles

Summary: Council members have a variety of ways in which they can engage CalSAE members. Council members are expected to contribute in some way most months (depending on your schedule and personal preferences), usually in the range of three to five hours per month. The goal is to increase member loyalty by engaging them in a variety of ways that provides value through relationship building and access to resources. The three primary options this occurs are listed below.

In addition, the regional council meets approximately four times a year to plan, discuss results and assess opportunities to connect members.

Member Outreach: The following opportunities are designed to connect with different members throughout the year. For any of these activities you can expect: 1. A script that can be used for phone calls, Zoom calls or emails. 2. A contact list (Google doc) to navigate contacts and to keep contact notes.

New Member Concierge (30-60 minutes per month;)

Purpose	To ensure each new member receives a personal welcome from a peer.
Requested	Two to four council members (a mix of AP and IP).
When	Monthly

This person welcomes new members to CalSAE with a personalized contact (staff will provide a phone script and e-mail template). This contact is designed to determine the member's reason for joining, so that CalSAE can best serve that member, as well as seeing if there is anything you can help that member with at that moment. By helping the member quickly, we demonstrate CalSAE's value early and help us keep that member. The concierge identifies the need and can reach out to staff or the council for resources or assistance, and would contact about five members per month.

Member Engagement – Recent Members (120 – 240 minutes)

Purpose	To actively engage members throughout the year.
Requested	Approximately four to six council members (a mix of AP and IP).
When	Throughout the year

This role serves to ensure members are actively engaged with CalSAE and consider CalSAE a real and viable resource for their jobs and in their careers. This role will focus primarily on members who are within their first three years of membership. Staff will provide contact lists, call scripts, and e-mail follow-up templates, but it will require a certain level of personalization. As CalSAE members tend to be very friendly, most members expect them and welcome them. Based on current projections, staff estimates each volunteer will make approximately 30 contacts over the course of the year, or five every other month.

Member Procurement (30 – 60 minutes per drive)

Purpose	To support member retention and ensure a healthy flow of new members.
Requested	Approximately six council members (a mix of AP and IP).
When	November, March, and June

This activity directly supports the membership retention and recruitment activities. There are three drives during the year: One for retention of current members and the two major membership drives the 18-for-12 campaign and the 15-for-12 campaign. These volunteers will be provided a targeted list to contact – in the range of five to ten people. This role is a testimonial as to how CalSAE has helped you and allowing them to see how it could help them, which will require some degree of personalization and listening.

Event Activities – UNDER CONSTRUCTION

CalSAE will be reconstructing its events During the 2020/21 year (Please see Education & Events Plan). While there is a possibility that in-person or hybrid events may be allowed, we are currently planning for events to be virtual. Because virtual events are not tied to geography or transportation, all paid events being planned can be attended by anyone in the state. This means we won't have local events per se (i.e. LevelUp programs), but councils will be encouraged to find creative ways to connect "local" members virtually.

NEW: Informal Social or Learning Events (60-90 minutes plus time to attend)

Purpose:	Develop a virtual get-together for a small group of members (20 or less) within a region that build connections and includes enjoyable/fun and/or learning elements.
Requested:	A "team" of at least two council members per event (a mix of AP and IP).
Frequency:	Approximately two events for the year.
Deadline:	Content or event description provided to staff 10 weeks prior to the event (for marketing purposes).
When:	Event description provided six weeks prior to the event.
Optional:	We may try an in-person or hybrid event for the Holiday Events depending on the circumstances.

Informal events are complimentary and for members within a region. The purpose is to provide an interesting, fun or learning opportunity for members to connect. The council member "team" is responsible for designing and executing the event, and coordinating the timing with staff. The CalSAE team will be responsible for updating the calendar, marketing the event and managing registration (if appropriate). Examples might include happy hours, coffee chats, book club, virtual tours (e.g. museum/destination), inviting guest speakers, etc.