



**T h e
T a s k
I s t o
A s k**

***Helping Your Members Maximize
the Value of
Their WCR Membership***

Women's Council of
REALTORS®

A W C R A c t i o n K i t



Together, We're on a Mission

This action kit is about helping your members access the benefits of their WCR membership. How?

Every great organization has at its core an intangible "something" that provides its strength. At WCR this core is expressed in the final words of our mission statement: *empowering women to exercise their potential as entrepreneurs and industry leaders*. This is the essence of who we are and what we stand for.

When you ask members to become involved, you are helping them access this membership promise. Because it is through participation that members begin to discover and engage their potential.

Don't wait for them to volunteer. The Task is to Ask!

Your Chapter Will Thank You

“The Task is to Ask” Program will do more than get members participating. It will also help keep your chapter viable and vibrant for the long term by creating a pool of developing future leaders.

And that’s a legacy all by itself.

Fact: Most WCR members first got involved because somebody asked them — and wouldn’t take “No” for an answer!

Fact: Recent research shows that a majority of WCR members would get more involved in their chapter, if only someone would ask them.



Every ‘No’ Is an Opportunity, an Open Door

Don’t worry when your members tell you they don’t have time to get involved. Because chances are, what they’re actually saying is, “I’m afraid you will give me a job that is too hard or too easy, too important or not important enough.”

Yes, they probably believe that they have enough commitments of their time. Your job is to show them that you offer meaningful work tailored to their interests and needs.

It’s a matter of matching the job to the volunteer.

And to help you do that we have included ready-to-use tools and checklists at the back of this folder.

Who to Ask

In a word: every member. It’s indisputable: from your newest member to your earliest past president, everyone will benefit from getting involved.

What Volunteers Need

In order to create value for your volunteers you have to satisfy one or more of their needs.

- A specific manageable task with a beginning and end.
- A task that matches interests and reasons for volunteering
- A good reason for doing the task
- Clear instructions
- A reasonable deadline
- Freedom to complete the task when and where it is most convenient for the volunteer
- Adequate direction and/or training
- A safe, comfortable and friendly working environment
- Follow-up to see that the task is completed.
- An opportunity to provide feedback when the task is finished.
- Appreciation, recognition and rewards that match the reasons for volunteering

From *Volunteers: How to Get Them, How to Keep Them*, by Helen Little (Panacea Press, 1999).

Let's Get Started

Step 1- Planning

1. Begin to plan in late August/early September (Note: It's not your year... yet. As you plan, continue to support your president in accomplishing *her* priorities.)
2. Develop a list of tasks that you are going to ask for help in accomplishing. Start with the task or event and work from the top down. Here's an example of one way to do the break down:

CHAPTER MEETINGS Each of the three groups has a coordinator who makes sure everything is done.

| Before the Meeting | At the Meeting | After the Meeting |
|--|---|---|
| <input type="checkbox"/> Announcement in newsletter | <input type="checkbox"/> Check In (at least 2)* | <input type="checkbox"/> Clean up detail (if needed) |
| <input type="checkbox"/> Prepare flyers-Post flyers at Board office, real estate office lunchrooms | <input type="checkbox"/> Door Greeter(s) | <input type="checkbox"/> Follow up call to new members |
| <input type="checkbox"/> Name badges prepared | <input type="checkbox"/> Networking facilitators | <input type="checkbox"/> <i>Everyone</i> who helped gets a thank you note (some might prefer an e-mail) |
| | <input type="checkbox"/> Table Hosts | <input type="checkbox"/> Send out Volunteer Evaluation & Feedback form |
| | <input type="checkbox"/> Host/facilitator for Guest Speaker | <input type="checkbox"/> Compile Evaluation form results and give to President |
| | <input type="checkbox"/> Pledge of Allegiance | |
| | <input type="checkbox"/> Inspiration | |
| | <input type="checkbox"/> WCR's Mission Statement and/or brief WCR testimonial | |
| | <input type="checkbox"/> Introduction of new members | |

**Supplies: Renewal forms and new member applications*

Step 2 - The Ask

1. Send a letter to your members along with the Member Preferences Questionnaire (see back pocket).
2. Depending on the size of your chapter, assign one or more team members to follow up to get as many completed questionnaires as possible.
3. Put the Member Preferences Questionnaires in a folder as they are returned. Keep it safe — you'll be referring to these sheets a lot in the coming year!



It's *How* You Ask

These practices, although common, are not likely to produce the best results:

“The awards committee needs more members. If anyone is interested in joining, please see me after the meeting”

“Anyone who wants to be on the awards committee, sign your name on the sheet that is being circulated before you leave.”

You'll get better results with the following:

“I volunteered to coordinate the annual awards program. There are many tasks to be done, some that take only an hour or two, like working registration, and some that you can do at home or in your office, like judging one category of entries. I'll be coming around the room today, and calling later this week, to ask some of you for your help.”

Step 3 - Matching the Member to the Task

1. Make plenty of copies of the Project Planning Worksheet, and complete the top section for every task to be assigned.
2. Enter deadlines in your calendar/PDA for follow up.
3. Go through your file of completed Member Preferences Questionnaires and find members who have indicated an interest in that task or area. Write their names in the Volunteers Section of the Project Planning Worksheet, best matches first.
4. Contact one of these potential volunteers to be the project/team leader and put a checkmark beside her name.
5. Make a copy of the Project Planning Worksheet for later reference and follow up.
6. Give every project or team leader the following:
 - Completed Project Planning Worksheet
 - *Point out the instructions in the Team Leader shaded bar.*
 - Checklist for Project/Team Leaders
 - Project Evaluation
 - *The team leader should give and collect one for each member of the team AND complete one herself.*
7. Follow up as scheduled (review your Checklist for Project/Team Leaders before making the call or sending the e-mail).

Step 4 - Thank You, Pass It On

1. Whenever feasible, ask your project/team leaders to return their completed Project Planning Worksheet to you. Save these sheets and pass them along to your president-elect, along with the Volunteer Preferences Questionnaires.
2. Send written thanks as soon as possible. This provides closure and recognition.

How to Say Thank You

- Be personal; never send a blanket Thank You
- Be specific; say in what ways the volunteer helped you or helped the chapter
- Be generous with your praise
- Mention future opportunities

WRONG WAY *Or, It's Not About You...*

Dear Volunteers,
As many of you know, I chaired the committee in charge of our recent Education Extravaganza. I want to send a public thank you to everyone who heeded my pleas for assistance. Your work helped things run smoothly, and saved my blood pressure, too. Thanks again!

Jennifer Brown
Chair, Education Extravaganza

RIGHT WAY ... *It's About Each of Them!*

Dear Elizabeth,
Thank you for working the registration desk Tuesday afternoon for our Education Extravaganza. You kept things running smoothly and on time, which in turn helped make our meeting such a big success. You are a superb colleague, and I want you to know that I look forward to working together again!

Most sincerely,
Jennifer Brown
Chair, Education Extravaganza

The BIG Picture: Permission to Change

WHY is it so important to ask members to get more involved? Because the new model of membership — who members are and what they want — has been evolving. Teams are in, hierarchies are out. You need more members doing more things in order to remain vibrant.

Here is a snapshot of trends emerging in individual membership associations like ours from across the country.



Transitioning OUT

The organizational chart was hierarchical, placing the president and other officers at the top and members at the bottom.

The path from new volunteer to elected officer typically required a member to occupy every position along the way.

Elected and appointed leaders acted as managers, working *over* volunteers.

Longevity — just showing up — was regarded as virtue enough and was typically rewarded with appointments and election to office.

Volunteers needed to commit to one year appointments. There were few short-term assignments.

Officers were recycled, and committee chairs could be reappointed indefinitely, even if it took on the appearance of a clique.

Past leaders were respected, but they didn't have very much to do.

Transitioning IN

The organizational chart is holistic, putting leaders and members side by side, in groups and teams.

Leadership development is a process, not a path. Officers are elected based on their skills and effectiveness.

Elected and appointed leaders act as coaches, working *beside* volunteers.

As volunteers demonstrate reliability and developing potential, they are asked to take on leadership roles.

Special committees and task forces offer opportunities for short term commitments. Standing committees provide oversight.

Healthy, robust chapters are developing leaders at every level. Officers and committee chairs assume their roles as a natural progression and are seldom recycled.

Leaders don't need "position" to be involved. They are effective coaches and mentors. They celebrate chapter milestones and successes.

Testimonials About:

Involvement

Involvement in WCR has helped me to understand others better so that I can understand and appreciate myself. And that translates to self-confidence.

Carolyn Sutherlin
Abilene (TX) Chapter

I experienced an increase in my business that is directly attributable to relationships formed through involvement at my local chapter.

Janice Spencer
Delta (CA) Chapter

I have developed more meaningful relationships, and I have realized that, through what I bring to the group as a person, I have added value to the organization. A sense of accomplishment.

Julie McManaman
Lincoln (NE) Chapter

I learned how to make decisions, delegate and empower others.

Susan Clark
Monterey Peninsula (CA) Chapter

As a result of WCR, I have achieved confidence in myself. As my self-esteem has grown, I've become a better REALTOR®, a better mother to my children and a better person. Thank you, WCR!

Mimi Hann
Ogden (UT) Chapter

Through my involvement in WCR I have gained exposure to dynamic, intelligent, successful women. I understand now that networking is a way of life.

Therese Olson
Naples on the Gulf (FL) Chapter

Leadership

Due to the professional and personal growth I achieved at WCR, I became one of only three women in fifty years to be president of my Local Board of REALTORS®.

Rose Marie Jung
Prince Georges County (MD) Chapter

WCR has given me the ability to grow personally in ways I never imagined. I developed leadership skills that allowed me to take on rewarding positions in my community.

Ginny Ryan
Tampa (FL) Chapter

WCR put me in touch with inspirational and professional women of integrity who became friends and who encouraged my self-growth. Plus, my leadership positions in my chapter helped me get elected to a directorship at my local REALTOR® association.

Jana Collett
DeKalb County (GA) Chapter

In the realm of leadership and organizational skills WCR made me to tap into abilities I never knew I possessed.

Linda Gould
Flint (MI) Chapter

WCR strengthened my belief in myself and helped me grow into a leader for my chapter. Soon I will pass that same torch to another member. It is a very satisfying experience.

Cid Young
San Francisco (CA) Chapter





[Date]

[Name]

[Company Name]

[Address]

[Address]

Dear [Name]:

This has been a great year for our WCR chapter.

One of the *continuing* goals of your Leadership Team is to provide what we know that you as a WCR member value most. Real-estate related programs. Opportunities to meet other real estate professionals. Referrals. A friendly, supportive community where it's okay to take risks and grow.

This is a people business, and one of the ways to get the most from belonging is to get involved. That can be in a big way, by agreeing to serve on one of our standing committees, for example. Or it can be a more "bite-size" opportunity.

To help you decide how you'd like to become involved next year, I've enclosed a Member Preferences Questionnaire. All I ask is that you check AT LEAST TWO preferences and return it to me by [Date] in the envelope provided.

In return, I promise to help you better access the benefits of belonging to the Women's Council of REALTORS®.

Let's make 200_ a year of growth, and achievement. Together, we can!

Sincerely,

[Name]

President-elect

Enclosure



Member Name: _____

Daytime Phone: _____ E-mail: _____

Time Commitment Preferred:

- A few hours
- Ongoing, Intermittent
- Year-long appointment
- Interested in holding office

Best Time of Day:

- Morning
- Afternoon
- Evening
- Doesn't Matter

Thank you for asking me to become more involved. I'm interested in the following areas. I've checked all that interest me. (Please check AT LEAST TWO.)

Chapter Meetings

- Being a table host
- Giving Pledge of Allegiance or an Inspiration
- Introducing a speaker
- Leading a roundtable discussion
- Making an announcement or giving a report
- Moderating a panel discussion
- Serving as a panel member for panel discussion
- Donating printing of materials (agendas, newsletters, handouts)
- Working registration at a monthly meeting
- Speaking at a meeting on the following topic(s): _____
- Conducting a workshop on the follow topic(s): _____

I've served as a leader in these nonprofit organizations in recent years: _____

Please return in the envelope provided, or fax or email. Thank you!

Membership

- Awards & Recognition
- Hosting prospective members at breakfasts
- Preparing a mailing
- Recruiting Campaign
- Retention Campaign
- Telephoning prospective members to invite them to meetings
- Telephoning prospects after they have attended a meeting

Newsletter

- Desktop publishing, graphic design
- Editing articles for newsletters
- Proofreading
- Helping with newsletter mailings
- Maintaining membership database, printing labels, mailing renewals

Other

- Budgeting, accounting, audits, financial planning
- Bylaws, standing rules, nominating
- Committee member
- Community service project
- Computer, database, Web site
- Fundraising/Corporate Sponsorship
- Helping put on a PMN Course
- New member orientation & recognition
- Writing and sending a press release
- Use of my home or office for a meeting

**T h e
T a s k
I s t o
A s k**

Helping Your Members Maximize the Value of Their WCR Membership

Project Planning Worksheet

| | | |
|---|-------------------------------|-------------------------------|
| Project Leader <i>The project leader completes the first four sections of the worksheet.</i> | | |
| Description of Project or Task | | |
| Estimated Time Required | | |
| Risk Level (high, limited, none) | | |
| Deadlines <i>Everyone enters these in their calendars for action or follow up</i> | | |
| Deadline for Progress Report | | |
| Deadline for Completion | | |
| Deadline for Final Report & Evaluation | | |
| Information, skills, tools needed for project/task | | |
| | Member Already Has | We Need to Provide |
| | | |
| | | |
| | | |
| | | |
| | | |
| Volunteers with the Skills, Experience and Interest to Match the Task (✓=Team Leader) | | |
| | | |
| | | |

| | |
|---|--|
| Team Leader <i>1.) Add any additional information/skills, etc., above. 2.) Add any additional volunteers, above. 3.) Make the volunteer assignments 4.) Mark deadlines in your calendar for follow up.</i> | |
| Assignments Made | |
| Status, Notes, Observations | |

**Sample
Project Planning Worksheet**

| | | |
|---|--|-------------------------------------|
| Project Leader <i>The project leader completes the first four sections of the worksheet.</i> | | |
| Description of Project or Task | <i>Call members who have not yet renewed their memberships.</i> | |
| Estimated Time Required | <i>2 hours for 2 people</i> | |
| Risk Level (high, limited, none) | <i>Medium: members may ask questions or challenge the value.</i> | |
| Deadlines <i>Everyone enters these in their calendars for action or follow up</i> | | |
| Deadline for Progress Report | <i>March 10</i> | |
| Deadline for Completion | <i>March 20</i> | |
| Deadline for Final Report & Evaluation | <i>March 25</i> | |
| Information, skills, tools needed for project/task | Member Already Has | We Need to Provide |
| <i>Telephone for local calling</i> | <i>X</i> | |
| <i>Good knowledge of WCR and the value of belonging</i> | <i>X</i> | |
| <i>Get up-to-date calling list of non-renewed members from on line Chapter Management Center</i> | | <i>Vice President of Membership</i> |
| <i>A schedule of meeting dates, dues and other information</i> | | <i>Team Leader</i> |
| <i>List of "Frequently Asked Questions" about membership renewal.</i> | | <i>X (Florence)</i> |
| Volunteers with the Skills, Experience and Interest to Match the Task (✓=Team Leader) | | |
| <i>Marion Smith</i> | <i>✓ Susan Samuels</i> | <i>Maria Rodriguez</i> |
| <i>Florence Masters</i> | <i>Rachel Harrow</i> | |

| | |
|---|--|
| Team Leader <i>1.) Add any additional information/skills, etc., above. 2.) Add any additional volunteers, above. 3.) Make the volunteer assignments 4.) Mark deadlines in your calendar for follow up.</i> | |
| Assignments Made | <i>Marion and Rachel. Florence volunteered to write out the list of frequently asked questions. Maria not available.</i> |
| Status, Notes, Observations | <i>March 10: Marion asked for some coaching. Florence will call her next week to go over the FA2 list.</i> |

CHECKLIST for PROJECT & TEAM LEADERS

Here are some tried and true principles which, when faithfully followed, will guarantee your success in coordinating and leading volunteers.

Volunteers are your colleagues.

They are not employees or subordinates. Treating volunteers as equals will always yield better results and create more satisfaction for the volunteer.

Give clear instructions, then get out of the way.

Certainly you want to offer help where it is needed. But don't mistake interference for help. It doesn't matter how the job is done, just that it is done. Monitor the outcome, not the process.

Give adequate training.

Don't assume everyone knows how to do a task. The reason some people volunteer is to gain new skills. Your extra patience will be rewarded with extra effort from an appreciative volunteer.

Doing the work yourself will bog you down.

Sometimes it seems easier just to do the job yourself. We've all been there. You must resist this impulse, however, because getting as many people as possible involved is an essential element of developing future leaders. And here's a secret: you yourself will grow more by getting involvement than by doing the job yourself.

Follow up, and in a timely manner.

Touch base when you say you will. If you don't, you are sending the message that the assignment was mere busywork, and that diminishes value of the volunteer's participation.

Praise in public, critique in private.

And remember that critiques are *always* about performance/behavior and *never* about the person herself.

People's circumstances can change.

It's going to happen. A volunteer will change offices, take on additional family responsibilities or just become overloaded. And she may not say anything because she feels bad about "letting you down." When this happens, let her know you understand, thank her and release her from her commitment. Leave the door open for future involvement when the situation changes.

Give volunteers an opportunity to give you feedback.

Ask if they have the tools they need to complete their task.

