# Table of Contents

1. Introduction
2. Diagnostics
3. Findings
4. Recommendations
5. Roadmap
1. INTRODUCTION

**Volunteer Recruitment and Retention Program Analysis Project**

The following report is the result of a partnership between North Highland and the Florida Guardian Ad Litem (GAL) Central Office and Regional Staff.

North Highland offered to volunteer management consulting services to conduct an analysis and assessment of the GAL Volunteer Recruitment and Retention program.

The business challenge is an increasing number of children in need of GAL services with the anticipation that the number will continue to grow.

GAL has a strategic goal of 10,000 volunteers statewide to meet the current and anticipated demand. There are on average 7200 active certified volunteers statewide with varying and unmet demand across the state based on geographic and demographic conditions.

The objective of the project was to identify opportunities and make recommendations to improve the recruitment and retention of volunteers.
2. DIAGNOSTICS

APPROACH FOR VOLUNTEER RECRUITMENT & RETENTION DIAGNOSTIC

The diagram below illustrates the project phases and activities conducted by North Highland, GAL staff and GAL volunteers to complete the assessment and analysis of the GAL Volunteer Recruitment and Retention program.

- **Discovery**
  - Client Document Request, Review & Analysis
  - Review of GAL website and LRPP
  - Review of CASA national standards
  - Research other States (TX, CA)
  - Develop Interview Questionnaire
  - Develop Volunteer and Workforce Survey

- **Assess for Change**
  - Conduct Leadership & Key Staff Interviews
  - Conduct Workforce Survey
  - Conduct Volunteer Survey
  - Conduct analysis of GAL operational reports
  - Conduct research of other states (TX, CA)

- **Analysis**
  - Analyze Results:
    - Turnover Trends
    - Tenure (Time in Position) Trends
    - Reasons for Separation
    - Recruitment Program
    - Retention Program
    - Recognition Program

- **Report**
  - Develop Report & Presentation
    - List of Observations
    - List of Recommendations
    - Roadmap
  - Conduct Leadership Workshop, Present Report
2. DIAGNOSTICS

SUMMARY OF THE ANALYSIS & ASSESSMENT ACTIVITIES

• Analysis of GAL Website, Social Media & Operational Reports
• Research on National Standards (CASA) and other States (California and Texas)
• Key Staff Interviews (Phone conferences with GAL executive staff, Regional Directors and a sample group of Circuit Directors.)
• Survey of the GAL Workforce (331 out 740 staff responded – 45% response)
• Survey of GAL Volunteers (2037 out 7,000 plus volunteers responded – 29% response)
SURVEY RESULTS

Likert Scale – (1-5) What does it mean?

Please answer the following questions regarding your experience as a GAL volunteer:

* 1. GAL does well in recruiting volunteers.

○ Strongly Disagree ○ Disagree ○ Neutral ○ Agree ○ Strongly Agree

Interpretation of Survey Favorability Ratings

<table>
<thead>
<tr>
<th>Percent Favorable / Favorability (Agree &amp; Strongly Agree)</th>
</tr>
</thead>
<tbody>
<tr>
<td>80% +</td>
</tr>
<tr>
<td>65% - 79%</td>
</tr>
</tbody>
</table>

Percent Neutral (Neutral)

| 33% + |
| Could indicate: |
| - It is an area of relatively low importance |
| - There is a lack of agreement across the organization and an examination of group differences may provide additional insight |
| - Participants did not know how to answer the statement |
| - Participants were ambivalent towards the statement |

Percent Unfavorable / Unfavorability (Disagree & Strongly Disagree)

| 35% + |
| Area of Immediate concern / Risk for the organization |
| 25% - 35% | An organizational issue exists |
| 20% - 24% | An issue may exist in the organization and this would warrant further investigation |
## SURVEY RESULTS - VOLUNTEERS

<table>
<thead>
<tr>
<th>Generally Satisfied</th>
<th>Neutral</th>
<th>Possible issue</th>
</tr>
</thead>
<tbody>
<tr>
<td>- Over 85% said there was a positive experience for the onboarding</td>
<td>- Over 55% felt communications was good within the circuit</td>
<td>- Only 37% agreed that changes were needed in the program</td>
</tr>
<tr>
<td>- Over 85% agree they know who to go to get information</td>
<td>- Over 50% said GAL has a strong recruiting program</td>
<td></td>
</tr>
<tr>
<td>- Almost 80% felt volunteers were held accountable for their actions</td>
<td>- Only 50% said the GAL was efficient</td>
<td></td>
</tr>
<tr>
<td>- 75% felt tools were provided to adequately do their job</td>
<td>- Over 45% felt communications was good between circuit and central, but almost 50% were neutral</td>
<td></td>
</tr>
<tr>
<td>- Over 75% felt volunteers were given appropriate information to get started quickly</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Over 75% felt volunteers were given appropriate tools to get started quickly</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Over 70% felt GAL will make changes that benefit the children</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Over 60% felt volunteers get regular feedback on performance</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
SURVEY RESULTS - VOLUNTEERS

Demographics

• Over 97% of respondents were certified
• Almost 65% were with GAL 3 years or less
• Over 70% handle 1-2 cases at a time
• Just over 60% have done less than 5 cases total
• Over 50% were retirees
• Over 70% are 55+
• 80% female
• 84% Caucasian
• No real prominence of degree
SURVEY RESULTS - VOLUNTEERS

- Key findings from the “additional comments” field in the survey
  - Desire more timely and accurate communications
  - Supervisor/Volunteer relationship not always positive
  - Want consistent and ongoing training
  - Strong recommendation to have a statewide strategy on marketing
  - Don’t feel they are always supported throughout working a case

<table>
<thead>
<tr>
<th>What change if any would you like to see GAL make for the volunteer program?</th>
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<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of Responses</td>
<td>71</td>
<td>28</td>
<td>24</td>
<td>8</td>
<td>51</td>
<td>6</td>
<td>36</td>
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<tr>
<td>Percent of Responses</td>
<td>21%</td>
<td>8%</td>
<td>7%</td>
<td>2%</td>
<td>15%</td>
<td>2%</td>
<td>10%</td>
</tr>
<tr>
<td>Ranking</td>
<td>1</td>
<td>4</td>
<td>5</td>
<td>8</td>
<td>2</td>
<td>8</td>
<td>3</td>
</tr>
</tbody>
</table>

Ranking

1. Communications
2. Training
3. Marketing
4. Supervisor
5. Support
6. On Boarding
7. Invest (Salaries)
8. Recognition, Recruit Diversity and Legal
## SURVEY RESULTS - STAFF

<table>
<thead>
<tr>
<th>Generally Satisfied</th>
<th>Neutral</th>
<th>Possible issue</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Almost 80% felt GAL will make changes that benefit the children</td>
<td>• 50% said the GAL was efficient</td>
<td>• 45% felt volunteers get regular feedback on performance</td>
</tr>
<tr>
<td>• Over 75% were neutral or higher in response the question on if changes were needed in the program</td>
<td></td>
<td>• Over 45% felt communications was good between circuit and central</td>
</tr>
<tr>
<td>• 75% felt tools were provided to adequately do their job</td>
<td></td>
<td>• Only 30% felt volunteers were held accountable for their actions</td>
</tr>
<tr>
<td>• Over 70% said there was a positive experience for the onboarding</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Over 70% felt tools were readily available</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Over 60% felt volunteers were given appropriate information to get started quickly</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Over 60% felt the same on tools</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• 65% information is made adequately available to volunteers</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Over 60% felt volunteers were given appropriate information to get started quickly</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
SURVEY RESULTS - STAFF

Demographics

• 50% were with GAL 3 years or less
• Over 90% were full time employees
• Over 90% of respondents work direct with volunteers
• 27% recruit volunteers
• Equal mix of age between 25-55
• 80% female
• 72% Caucasian
SURVEY RESULTS - STAFF

• Key findings from the “additional comments” field in the survey
  ◦ Want additional training on an ongoing basis
  ◦ Believe volunteers need more training
  ◦ Volunteers are not being held accountable for case work
  ◦ Need to determine what is the “perfect volunteer” and establish recruiting strategy based on analysis – characteristics of a volunteer
  ◦ Need more marketing and advertising

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<tr>
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<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruit Diversity</td>
<td>Supervisor</td>
<td>Accountability</td>
<td>Recognition</td>
<td>Training</td>
<td>Recruiters</td>
<td>Marketing</td>
<td>Invest</td>
<td>Communications</td>
</tr>
<tr>
<td>Number of Responses</td>
<td>11</td>
<td>16</td>
<td>19</td>
<td>7</td>
<td>56</td>
<td>9</td>
<td>14</td>
<td>17</td>
</tr>
<tr>
<td>Percent of Respondents</td>
<td>6%</td>
<td>8%</td>
<td>10%</td>
<td>4%</td>
<td>29%</td>
<td>5%</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>Ranking</td>
<td>6</td>
<td>4</td>
<td>2</td>
<td>8</td>
<td>1</td>
<td>7</td>
<td>5</td>
<td>3</td>
</tr>
</tbody>
</table>
KEY FINDINGS - INTERVIEWS

ORGANIZATIONAL STRUCTURE

- In general there is overall satisfaction with the org structure and new leadership.
- Local grassroots recruitment works the better, folks know the market, where to target
- GAL has two organizations in one, the Attorneys and the Case Managers. It worked better when the attorneys reported to the CDs.
- Need better staff development. Need to provide more online training that is focused on adult learning styles. Focus on the Staff/Volunteer relationship. Figure out how to sustain and develop.
- Need to provide more structure and standardization statewide to support RD and CDs in their local decision making for kids.
- The CAM/Volunteer is a critical relationship. We need to focus on what makes that relationship work.

PROCESSES

- Support for the onboarding volunteer is directly related to the retention of the volunteer
- Find a way to incorporate legal aspects into the protective services to encourage more attorneys across the state.
- Upfront communication and realistic expectation setting for volunteers on the program/system helps in retaining volunteers
- Need to improve operational processes for responding to potential volunteers and supporting and keeping current volunteers connected.
- Need to be more strategic about the way we allocate budget to initiatives.
- We have an annual evaluation process that is flexible. This is the recertification process. This is one of the few standardized processes and it works well.
KEY FINDINGS - INTERVIEWS

WORKLOAD

- High workloads due to increasing number of children impact retention and program fidelity. Need to get better at workload management.
- Workload can cause backfill of roles and functions by caseworkers - i.e. case workers become recruiters, volunteers take on more of the case workers responsibilities.
- Where there are no recruiters the CAMs do the recruiting, impacts workload.
- Workload is the biggest risk to recruitment and retention. High turnover of staff and volunteers is a direct cause.
- Recruitment of unstable or bad fit volunteers is the biggest risk to the program and recruitment.
- Lack of organizational support for volunteers is the biggest risk in R&R of volunteers.
- 1/3 of volunteers leave within the first 7 months. It takes 2 years to become a good volunteer, so many of our volunteers never reach competency.
- Mentor program is good idea however due to workload, geography outside obligations, putting the time in is difficult.

TECHNOLOGY

- We are 10 years behind in our use of technology. Adoption of the Case Mgt software statewide is only 40%. One reason is the average age of the volunteer. Need to reinforce the training and adoption of the use of the system.
- However those who use the Optima have a very positive response to the software. Provides cross circuit visibility, greater access to more information.
- Everything we do should be developed into a mobile “App”
KEY FINDINGS - INTERVIEWS

COMMUNICATION

- New Marketing Plan and campaign has been successful, need to continue to implement and improve.
- Need better and more timely communications at the Macro level. Often Circuits get information that is no longer timely, opportunities are missed.
- Could focus less on organizational recruitment and networking, appears to be less effective.
- Need more and consistent communication with Volunteers.
- Use State funding to support marketing campaigns.
- Include and engage local leadership in the planning and implementation of initiatives. We need to do a better job of proactively getting buy-in from local programs.
- There is a high level of transparency in communications.
- Travel limitation impacts information sharing and real-time communications.
- Communications from state leadership to circuits is very effective.
- Perception change can be important about what a volunteer for GAL looks like. Not sure how that's done, but it could be helpful. From a marketing standpoint, list how a GAL volunteer can be anyone.
- We are quick to share successes across the state. This is done primarily through email, we also use FB. Biggest vehicle for comms in their program.
FINDINGS – STATE RESEARCH: TEXAS

#1: NEW STATEWIDE MARKETING CAMPAIGN LED TO OUTSTANDING RESULTS

- Texas deployed a statewide marketing campaign developed by a professional firm
- Keys to success:
  - Obtaining state-wide buy-in
    - Through inclusive work committees of largest media markets
    - Requiring districts to use materials in order to obtain funding
  - Consistency in brand and call to action across state (go to our texascasa.org!)
    - Slogan “Every Child Has a Chance – It’s You!™
    - Had aligned resources from social media posts to call center scripts
  - Launching at statewide conference with excitement (and most circuits present)

Results (comparing Sep-Dec 2015 to Sep-Dec 2016):

- Total volunteer increase: +7.1% annual increase
- Total website views: +324%
- Unique website views: +336%
- Submitted potential volunteer contact forms: +130%
- Average time spent on website: +58 seconds from 1 min. 38 seconds
FINDINGS – STATE RESEARCH: TEXAS

#2: LEGISLATIVE ADVOCACY TEAMS RETAIN VOLUNTEERS AND IMPACT CHANGE

- Texas has 27 Legislative Advocacy Teams (LAT) across the state – made up of volunteers
- These teams receive funding and coaching to equip them to speak to local government representatives about issues in the child welfare system
- Led by LAT Chair (staffer) and Co-chair (volunteer)
- Viewed favorably as a part of the system that works well

Benefits:
- Developed strong relationship with legislative body across state
- Helped retain volunteers
  - Many volunteers leave due to frustration with “the system”
  - This team gives those frustrated with the system a sense of purpose; a way to help bring about systemic change
#3: Organizational Readiness for Volunteer Growth

- California’s CASA organization has seen a 6% growth of their volunteer base since instituting their 5 year growth strategy plan in 2015
  - A key component of their strategy is to ensure that the local California CASA organizations are well equipped to train, manage, and retain a growing volunteer pool.
  - Scaling the local organizations for the resulting growth can be a serious challenge for the local organizations and they rely heavily on the central, state organization. The state organization assists the local organizations by:
    - Increasing the number of staff members for local organization volunteer recruitment and training
    - Making the retention of staff members a priority through more competitive salaries and benefits
    - Allowing them to use the state organization’s social media consultant for customized marketing materials
    - Encouraging regional collaboration for training
## FINDINGS – ADMIN REPORTS

<table>
<thead>
<tr>
<th>Finding</th>
<th>Source</th>
<th>Implication</th>
</tr>
</thead>
<tbody>
<tr>
<td>From Oct 15 - Sep 16, number of children assigned to staff has increased 39%</td>
<td>Rolling 12 month circuit data</td>
<td>Need to increase volunteers so staff can move to supportive role</td>
</tr>
<tr>
<td>18% of potential volunteers didn’t receive a response to their volunteer inquiry</td>
<td>GAL Volunteer Inquiry Responses (survey results)</td>
<td>Need systems and resources in place to respond to inquiries</td>
</tr>
<tr>
<td>Feb 15-Sep 16, total volunteers and certified amount is flat, but active certified down 3.7%</td>
<td>Volunteer Data Trends</td>
<td>Need to increase retention and moving volunteers through funnel (volunteer → certified → active certified)</td>
</tr>
<tr>
<td>Did not reach FY15-16 certified volunteer goal (621 short) and 4,674 new volunteers needed this year to hit growth goals, and replace lost volunteers</td>
<td>Recruiting performance and CASA GRANT - Volunteer Recruitment Goal document</td>
<td>Consider making more realistic growth goals, and ensure you have goal buy-in across state</td>
</tr>
<tr>
<td>Circuits have variance in recruiter staffing: 0.5 FTE in Circuit 3, 4 in Circuit 13</td>
<td>Call Center Presentation</td>
<td>Ensure circuits have proper staff support</td>
</tr>
<tr>
<td>Highest turnover percentage positions from 7/15 to 8/16: Volunteer Recruiter (65%), Program Attorney (61%), Child Advocate Manager (50%)</td>
<td>People First Turnover Data</td>
<td>To impact volunteer numbers, attention must be paid to retaining relevant staff, which include these 3 roles</td>
</tr>
</tbody>
</table>
4. RECOMMENDATIONS - RECRUITING

**Recruiting**

- Create a professional marketing strategy
  - both volunteers and staff,
  - Consistent but ability to personalized for regions
  - recognizable spokesperson
- Re-brand the Volunteers
  - Example: Child Champion
  - Consider re-branding GAL to align with national brand
- Prepare diversity recruiting strategy
- Leverage 211 to centralize recruiting and improve volunteer response rate
- Develop a hiring process and volunteer persona (what characteristics make up a perfect volunteer)
- Create quarterly meetings for regional recruiters to share best practices.
- Create a central office position to coordinate with the local recruiters to establish a formal program to work with local churches on recruiting programs
4. RECOMMENDATIONS

Onboarding

• Formal mentoring program
• Develop standard message for what an advocate does

- Examine the Onboarding process from initial contact through the first experience in court.
  - Establish process best practice
    - Identify key steps and activities
    - Define roles & responsibilities for each step
    - Develop supporting materials (marketing, procedure and training)
  - Re-examine onboarding training
    - Alternate deliver times and mechanisms
    - Training materials
4. RECOMMENDATIONS

**Retention**

- Develop a training strategy
  - Initial and ongoing training
  - What are the gaps in volunteer capabilities
  - Focus groups to identify critical needs
  - Address both volunteers and staff
  - Address CAMS awareness and expectation of volunteer capabilities
- Pay CAMs relevant to the market
- Develop a volunteer and staff communication strategy
  - include an app
  - Social media
  - Real time communication
  - Testimonials of volunteers on Facebook page
- Create a diversity strategy for staff
- Develop a recognition program that are meaningful to volunteers and staff
- Consider developing legislative advocacy teams
5. ROADMAP

• To be jointly developed with GAL
THE VOLUNTEER

Thank You for the Opportunity to make a difference in your lives and the lives of children you serve

– The North Highland Team

Questions?
STATE RESEARCH CONTACTS

• Texas CASA
  ○ Deedra Baker, Program Operations Director
    • Dbaker@texascasa.org  (512) 610 - 6101
  ○ Dennise Jackson, Recruitment and Retention Officer
    • Djackson@texascasa.org  (512) 610 - 6130
  ○ Caitlyn Perdue, Communications Senior Specialist
    • Cperdue@texascasa.org
  ○ Leslie Morton, Communications and Awareness Executive Director
    • Lmorton@texascasa.org  (512) 610 - 6101

• California CASA
  ○ Karen Finan, Program Director
    • Kfinan@californiacasa.org  (831) 235 - 6487
KEY LEARNINGS FROM TEXAS CASA INTERVIEW #1

Dennise Jackson, Recruitment and Retention Officer
Caitlin Perdue, Communications Senior Specialist

1. **Marketing consistency is key**
   1. Messaging on what CASA does
   2. Messaging on qualities of a CASA volunteer (had profiles for this)
   3. Call to action (for Texas, was driving everyone to website)
   4. Consistency in all materials – from website to social media posts to call scripts

2. **Need buy-in across the state**
   1. Allow as many regions as possible, and board, to have voice in developing campaign
      1. Included urban and rural
   2. Incentivize the consistency – “if you want funds from us, use our resources”
   3. Big kick-off event, where programs knew what was coming, was very helpful

3. **Must provide adequate resources**
   1. Social media posts
   2. Phone call scripts
   3. Coaches to work with individual, perhaps struggling districts
Deedra Baker, Program Operations Director

1. Texas CASA is a member organization that provides oversight, statewide services, and technical assistance to all individual CASA chapters, which are their own independent non-profits

2. Developed strong relationships with the legislative body through Legislative Advocacy Teams (LATs)—teams of trained volunteers who build relationships with local officials
   1. They are led by a LAT Chair (staffer) and Co-chair (volunteer)

3. Drove paradigm shift years ago to have volunteers manage cases, rather than staff, and the volunteer to staff case ratio standard is 80% - state ratio is above this at 86%
   1. This shift was driven by aligned behaviors across organization including training, funding, messaging