

Organization for Transformative Works

Volunteers &
Recruiting
Annual Report

2013



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SUMMARY

Volunteers & Recruiting began the 2013 term finalizing our Still Willing To Serve (SWTS) project from 2013 as well as continuing work on Revision and Documentation of Staff & Volunteer Induction/Removal/Changes Processes and Recruiting Revision projects. 2013 saw us produce our first quarterly reports, for use in tracking our work and helping with the 2014 Annual Report.

In April 2013, we debuted our new, targeted recruiting system. Through the course of the term we brought in 78 new staff and 236 new volunteers in roles using this system and continued to revise and clarify our procedures and documentation for chairs and our committee. We also continued to handle role changes for many existing personnel.

We finalized work on tutorials for organization tools, established a set of guidelines for making requests of the committee for other personnel, launched several projects to continue strengthening support for organization leadership, and carried several projects and new project ideas into the 2014 term.

COMMITTEE MEMBERSHIP

In 2013, we had 4 continuing staff from 2012 on the roster for the full term, added 3 new staff and removed 2 staff and 1 chair throughout the term.

In March 2013, Curtis Jefferson was approved by the Board of Directors to co-chair the committee with the goal of creating a rotating co-chair structure.

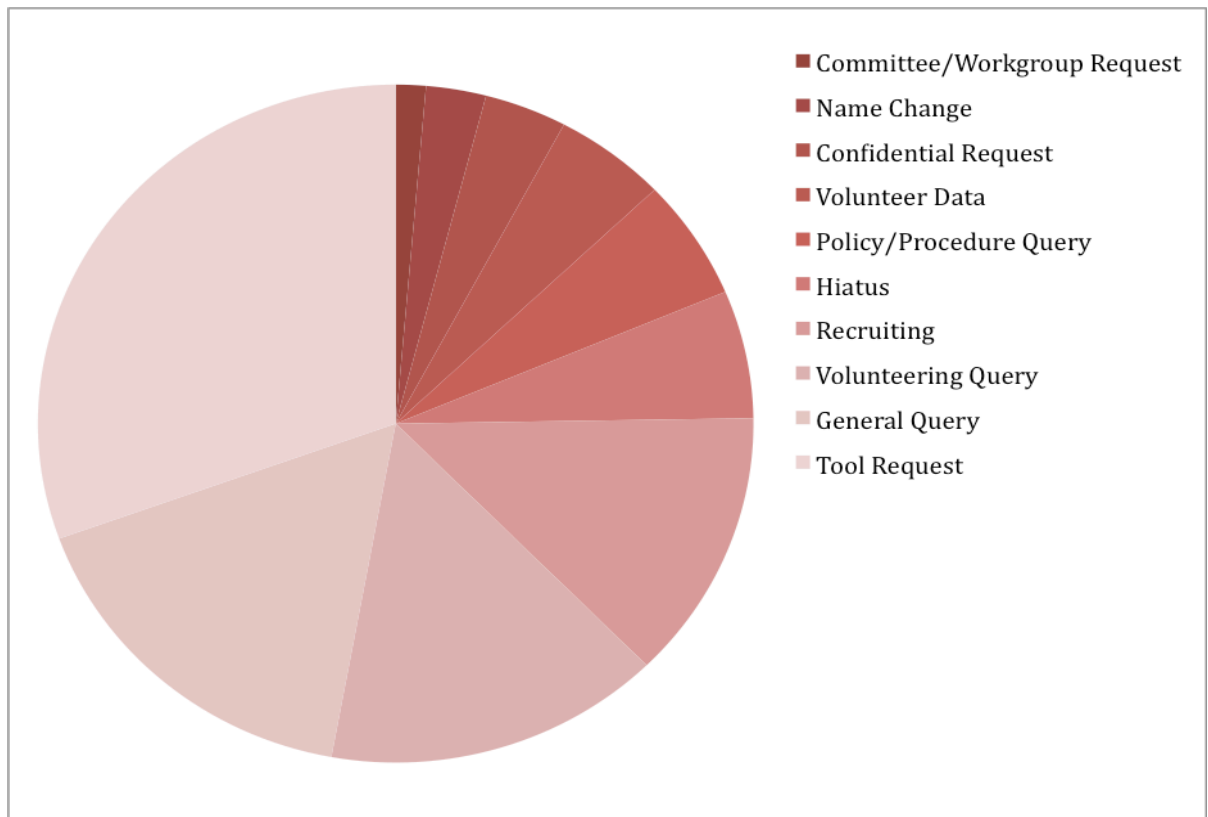
At the term's end, continuing staff were Renay (chair), Alison Watson, FishieMishie, tekla, Erin C., Cece, and bookgazing.

COMMITTEE OPERATIONS

REQUESTED TASKS

Throughout 2013, we recorded tasks requested of us by the rest of the organization to help track our work, complete tasks quickly, and to see where our staff hours were being used. This system, documented on the Internal Wiki, requires staff members to add tasks (generally received via email) to our task list on Basecamp, and assign themselves to the item if they are planning to complete it. This allows a committee-wide view on who is in charge of each task.

The following graph illustrates the requested tasks from January 2013 to December 2013.



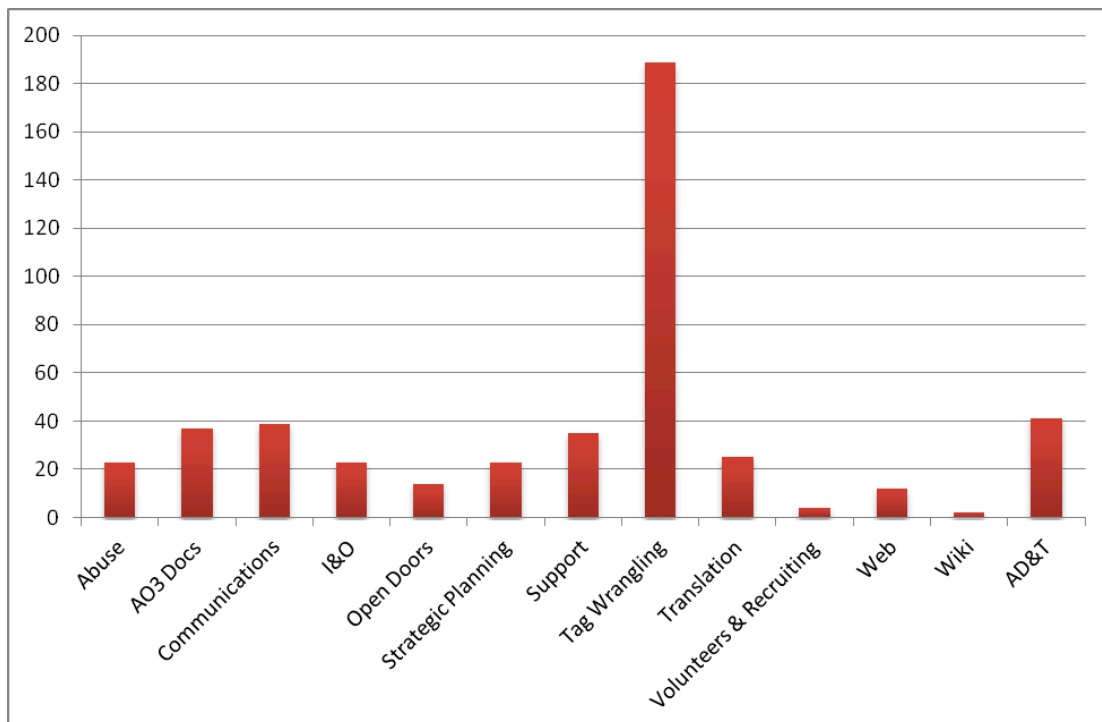
Committee/Workgroup Request	4
Name Change	8
Confidential Request	11
Volunteer Data	15
Policy/Procedure Query	17
Hiatus	18
Recruiting	38
Volunteering Query	45
General Query	49
Tool Request	90
Total Requests	295

Tracking all requests made for a entire term enabled us to handle our workload in a much more efficient way, including assigning and reassigning a task, consulting with other committee members about the work on a task, and passing on information in traceable ways. It also helped us see where our documentation needed updating or revising, or gave us a chance to note where we lacked a full policy or procedure. With an average of 5.67 tasks to complete each week (many of which involve multiple steps, some of them cross-committee, and which generate a lot of email), tracking our tasks throughout a full term became integral to our ability to move tasks forward month to month without losing each task item, so we could continue following up as needed. It also gave us the data needed to support a proposal for an additional ticketing system.

RECRUITING

With the completion of our Recruitment Revision project (discussed later in this report), we were pleased to be able to reopen our new public recruitment system in April. Under this system, chairs reserved recruitment slots for the particular roles they wished to fill. We then added the relevant recruitment forms to the website and Communications advertised them on OTW news outlets.

Over the course of the term we opened 22 roles on 13 dates. 17 unique positions were advertised from 13 committees, with a total of 467 applicants received.



Public recruitment was available to chairs on 18 dates between April and August. We limited opening slots to a further 6 dates between August and October due to our increasing workload, and having tracked that only 7 recruitment dates had been reserved by the end of July.

Our preference was to have 2-3 roles open in each slot, to reduce the likelihood of prospective volunteers applying for a role because it was the only one available.

Most roles were open for a week for applicants, however Tag Wrangling twice closed recruitment within a few days, due to a large number of responses. In their later recruitment slots, they moved to target recruitment to their specific fandom needs.

INDUCTIONS & REMOVALS

Throughout the course of the year, especially after the relaunch of our targeted recruiting system in April 2013, much of Volunteers & Recruiting work was on one of our core tasks, induction of staff and volunteers into roles, and the removal of staff and volunteers from those roles. This section of the report provides a summary of the entire year's inductions and removals. "Leaders" in this chart refer to Board directors, committee chairs, or workgroup/subcommittee leads.

Leader Inductions	10
Leader Removals	15
Liaison Inductions	34
Liaison Removals	32
Staff Inductions	78 <i>78 unique persons.</i> <i>61 new staff approved to serve in 2013</i>
Staff Removals	74
Volunteer Inductions	236 <i>228 unique persons</i> <i>216 volunteers new to the OTW in 2013</i>
Volunteer Removals	240

PROJECT WORK IN 2013

During 2013 we took part in 14 projects, completed 8, set 5 to be continued into 2014, and set 1 aside to be reassessed at a later time. These projects and proposals ranged from recruitment revision, building tutorials, creating request guidelines, strengthening confidentiality and integrity of information handling, examining internal processes as well as working to create more transparency for both staff and the rest of the organization.

COMPLETED PROJECTS

2012 VOLUNTEERS & RECRUITING PROJECT: REVISION AND DOCUMENTATION OF STAFF & VOLUNTEER INDUCTION/REMOVAL/CHANGES PROCESSES

The purpose of this project was to revise and document the procedures for staff and volunteer induction/removal/changes. Induction was felt to be confusing for new Volunteers & Recruiting staff; documentation was limited and out of date. This project involved assessing current knowledge about induction/removal/changes, talking to chairs about their committee tool needs, documenting requirements in a consistent format and creating Basecamp templates, revising or creating email templates and revising and creating tool setup manuals. The project was concluded by finalizing the requirements of non-respondent committees, revising a good practices document, and creating a training program and ongoing revision process. This project began in June 2012 and was completed in July 2013.

2012 VOLUNTEERS & RECRUITING PROJECT: RECRUITMENT REVISION

This project was to transform the existing open recruitment system into a needs-based system, which will help leaders recruit suitably qualified personnel when they are required. It will also assist prospective volunteers to make a decision about what area they could best help out in, as well as ensuring that they are further supported through increased structure in the form of defined position descriptions and training plans. This project began by creating templates for position descriptions and training plans, as well as a guide to interviewing and selecting personnel for chairs. It continued with the documentation of procedures for both Volunteers & Recruiting staff and chairs/leads to follow in the recruitment process and cooperation with the Webmasters committee to create a new volunteering area of the website. The project concluded with assisting individual chairs to open recruitment for their roles. This project began in earnest in October 2012 and was officially completed in September 2013.

2012 VOLUNTEERS & RECRUITING PROJECT: CREATE TRAINING MANUALS FOR OTW TOOLS

Within the organization, there has been a constant request for training on the main organization tools that we ask our volunteers to use. Some of the tools are organization-internal and maintained by Systems (mailing list, Internal Wiki, Vault) and some are third-party (Campfire, Basecamp). Because we have such a wide array of tools with different user interfaces and some of our third party tools are not well documented, we created a series of tutorials for mailing lists, Campfire, Vault, Basecamp, and the Internal Wiki that bring in interactive elements to help volunteers practice using them in ways they may encounter in their work. These tutorials were created with a feedback component, so as volunteers used and learned different ways to make use of these tools, and as technology changed and improved, we could continue to improve the tutorials in

an ongoing way. These tutorials were completed and a review period added for annual assessment in 2013.

2013 VOLUNTEERS & RECRUITING PROJECT: 2012 ANNUAL REPORT

The 2012 Annual Report for Volunteers & Recruiting was a project launched to summarize and examine projects undertaken during the 2012 term to provide context about those projects and the results for third parties. The 2012 Annual Report also allowed Volunteers & Recruiting to consider all the work done during the term and apply additional thoughts and advice for future staff serving on Volunteers & Recruiting.

2012 VOLUNTEERS & RECRUITING PROJECT: 2012 STILL WILLING TO SERVE

This project was designed to identify current staff's committee interests for next term, in order to provide a list to chairs to rebuild their committee. The Still Willing to Serve also provides a low pressure exit for staff to leave the OTW and feedback to be analyzed and collected for a future report on the staff experience to the Board of Directors. Preparation started in October 2012, the survey ran through November, and we did follow-up work and processed the staff removals in December. Work in 2013 involved working with chairs to consider staff who were interested in joining new committees and inducting those who were accepted into new roles.

2013 VOLUNTEERS & RECRUITING PROJECT: 2012 YEAR END FEEDBACK ANALYSIS

As part of the 2012 Still Willing To Serve Project, staff were asked to provide feedback on their experiences in the organization. The survey specifically asked questions related to committee roles in the organization, communication between committees and from chairs, and the ways information is shared across the organization. Once the SWTS ended, the information was compiled and separated into questions with closed responses and open responses. The closed responses were compiled into charts to illustrate overall opinions while the open response questions were reviewed by three members of the committee and coded by themes and tagged with the committee or area of the organization to which they related.

The information was all compiled into a formal report for the Board of Directors that provided information on all responses in an anonymized way and showed the frequency of themes that came up throughout the survey responses. The report also contained sections that outlined the most common issues identified, detailed Volunteers & Recruiting projects that might address some of the issues, and provided suggestions for the Board to consider.

2013 VOLUNTEERS & RECRUITING PROJECT: DEVELOP 'HOW TO REQUEST...' PAGE

In order to better serve the organization, it was proposed that the committee create a resource page that included a list of items typically requested of Volunteers & Recruiting and how to submit those requests for most efficient processing. During January and February 2013, the committee outlined common requested tasks and put together a document for this purpose. Also included on the page are a few items that tend to come to Volunteers & Recruiting that are handled by other committees with the aim of helping point people in the right direction. The Volunteers & Recruiting Request Guidelines were posted on the Internal Wiki on 8 February 2013.

As part of this project, a proposal regarding the expansion of access on organization tools was also drafted, shared with relevant committees involved in the management of organization tools, and approved by the Board.

2013 VOLUNTEERS & RECRUITING PROPOSAL: PRIVACY & BASECAMP PEOPLE PROJECT

Beginning in 2012, the committee began using two separate project spaces in the organization's Basecamp project management software – one for project work (Volunteers & Recruiting – Projects) and one for personnel-related tasks (Volunteers & Recruiting – People). During the course of discussion regarding the new recruitment system, questions were raised about whether the personnel-related space should be made private to the committee due to the sensitive nature of some of the committee's work. A proposal outlining the benefits to the committee's efficiency as well as added protections for staff and volunteers was drafted in early February and submitted to the Board of Directors. The Board approved the proposal on 23 February and this was enacted on 27 February.

PROJECTS CARRIED OVER TO 2014

2013 VOLUNTEERS & RECRUITING PROJECT: PERSONNEL CONFIDENTIALITY GUIDELINES

A focal point of work for Volunteers & Recruiting in 2013 was the integrity and confidentiality of staff and volunteer information. Confidential information on organization tools was restricted and steps were taken to ensure the continued security of the volunteer database. The work on these issues raised questions regarding clear organization-wide confidentiality guidelines. While Volunteers & Recruiting staff are bound by the Volunteers & Recruiting Confidentiality Agreement, there were no set procedures for chairs, leads, directors, and others who might deal with sensitive information regarding organization personnel. Volunteers & Recruiting created this project to create a document that would fill this gap, particularly in supporting and helping to protect the organization's leaders and all personnel when handling confidential personnel information. This project will be put on the committee's agenda in 2014 for completion.

2013 VOLUNTEERS & RECRUITING PROJECT: CHAIR & LEAD TRAINING

As the OTW has grown, the work of committee chairs has become more involved from a leadership, personnel management, and organization process perspective. During these changes, documentation for chairs has not been kept up-to-date or revised and adequate support programs have not been put in place for all of the tasks chairing entails. While the operational role of a chair can vary from committee to committee, there are universal tasks and skills that apply across the organization. Volunteers & Recruiting created this project to address the lack of formal training and support documents and create a program to assist prospective, new, and current chairs with their work. The project was put on hold in late in the 2013 term to accommodate necessary end of term recruiting, and will be a major focus of the 2014 term.

2013 VOLUNTEERS & RECRUITING PROJECT: VOLUNTEERS & RECRUITING STAFF TRAINING PLAN

As part of Volunteers & Recruiting's goal to provide better documentation for the organization, the committee itself is included. It is important to ensure that adequate training exists for new volunteers as they begin a new role, and this is especially true for Volunteers & Recruiting, which handles tasks for all volunteers at every level and all committees. This project seeks to establish a comprehensive overview of and hands-on training for Volunteers & Recruiting policies, procedures, and tools, as well as the development of training videos to ensure that new staff can quickly get up to speed and begin assisting with committee tasks. This project is expected to conclude in 2014.

2013 VOLUNTEERS & RECRUITING PROJECT: 2013 STILL WILLING TO SERVE

This project follows on from previous Still Willing To Serve (SWTS) undertakings. Due to a lack of staff time and a new recruitment process, the 2013 SWTS was used only as a low pressure exit for staff to leave the OTW. This year we also asked workgroup leads and chairs to contact and survey their volunteer teams. Preparation for the SWTS started in October, with the staff survey running in November. Follow ups and staff removals began in December. Volunteer removals were staggered from October, based on receipt of responses from chairs/leads. This project will conclude in early 2014.

2013 VOLUNTEERS & RECRUITING PROJECT: CRM DATABASE MIGRATION

In late 2012, Volunteers & Recruiting encountered some security warning messages from CiviCRM, the CRM database that held the OTW's volunteer records. After several discussions, the committee determined that the most sustainable and secure solution would be to move to a cloud database that could be maintained independent of OTW resources. A proposal to move the database contents to a Salesforce CRM database was approved by Board in December of 2013, and the data that could be mass exported and imported was moved in late December. Volunteers & Recruiting continued to customize the Salesforce database in early 2014, manually move the data that could not be exported, and check against the former database for possible errors caused by the import.

SUSPENDED, REJECTED AND DEFERRED PROJECTS

2013 VOLUNTEERS & RECRUITING PROJECT: TOOL ACCESS AUDIT

This project was designed to ensure all volunteer access to organization tools managed by Volunteers & Recruiting was accurate, database records match tool access and account information, and only active personnel have access to the appropriate tools. This project was placed on hold in the end of the 2013 as Volunteers & Recruiting prepared to shift the volunteer database to Salesforce. A process for creating annual audit projects and the initial audit will be completed in the first half of the 2014 term.

2013 VOLUNTEERS & RECRUITING PROJECT: VOLCOM LENDING LIBRARY

This project was created to be a support resource for volunteers & staff and to supplement internal training documentation and tutorials by providing access to best practices in non-profit, personnel & project management. The goal was to begin evaluating and collecting reference materials that volunteers could access when needed on topics ranging from project management to handling personnel. Project was deferred until 2014 so the committee could focus on shifting volunteer records to a new, more manageable database.

CHALLENGES FACED IN 2013

1. An ongoing challenge faced by the committee, and one endemic to the organization as a whole, is directly related to the OTW growing in size and project scope. As the organization grows, the need for the committee to be available to more personnel and to respond promptly to requests increases, and the workload increases with it.

This term we saw increasing numbers of request tickets and we found it necessary to begin additional internal projects as we attempted to fill holes in our policies and procedures. The lack of available staff to handle the workload was discouraging to the available committee members.

In 2013 we lost several staff and a chair due to non-org responsibilities in the middle of several ongoing projects. While we conducted recruitment towards the end of the term in an attempt to build up our numbers, the lack of experienced staff was keenly felt. This resulted in the committee having to drop several non-essential projects, in lieu of more pressing end of term projects. This caused extremely low morale toward the end of 2013.

2. A challenge directly related to our lack of staff was difficulty prioritizing our limited resources among all the projects we wanted to complete in order to strengthen the committee and to support the rest of the OTW's personnel, in addition to on-going, time-sensitive tasks. We also felt we received conflicting messages and pressure from outside our committee regarding which projects and tasks ought to be accomplished first, which contributed to low morale.

3. One of the challenges that the committee faced in 2013 was the effect of external variables on recruitment cycle planning.

The committee developed a general timeline for recruiting to minimize conflict with project work while maximizing the number of recruiting slots available over the course of the year, without overloading Volunteers & Recruiting staff. There are a few variables in this timeline outside of the direct control of the committee: induction tasks completed by other committees, the time for chairs to complete interviews, and the time for Board to approve staff.

The first was not generally an issue in 2013, and delays in interviews were not unexpected due to it being a new process. However, of the 61 new staff approved by the Board to serve in 2013, the individual approval time ranged anywhere from 1 day to 24 days. There was a relatively large overall variance from one set of approvals to the next, and variance in the information made available to the Board for approval. The inconsistency with which staff were approved for service made it difficult for the committee to plan for induction task periods, as well as inform recruiting chairs of what they should expect from that portion of the process.

GOALS FOR 2014

At the end of 2013, Volunteers & Recruiting staff discussed what they would most like to accomplish in 2014. These goals were refined to the following:

- Continue to improve and streamline the recruiting process and support chairs throughout 2014.
- Significantly progress with or complete our outstanding projects by the end of 2014.
- Improve our level of service by improving our own training materials and documentation by June 2014.
- Move our volunteer database to Salesforce and purge our old databases by July 2014.
- Complete a revision of the OTW's Code of Conduct by November 2014.
- Achieve efficiencies by introducing a new ticketing system by December 2014.

LOOKING AHEAD

Volunteers & Recruiting have a number of ideas for future projects to be discussed and planned after 2014. These include:

- Improve our performance by developing quarterly Volunteers & Recruiting performance survey and analysis system
- Contribute positively to volunteer morale by developing an Org-wide recognition program
- Provide additional access by OTW personnel to Volunteers & Recruiting staff through open houses
- Assist new personnel to learn about the Org through the creation of an OTW handbook
- Develop a mentoring program