



# Volunteer guide for RTOERO district executives



"Being a member of the district executive has allowed me to continue to learn, to meet new people, to serve our community and the communities beyond our borders and to engage in relevant discussions for the improvement of life in general."



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“My RTOERO responsibilities keep me busy. I think volunteerism increases the feeling of self-worth and is good for the brain.”



## Introduction

RTOERO retirees are known for their generous volunteer efforts with their families, friends, work and community. Many lend that support to RTOERO as well, and we can't do what we do without them.

But surveys have shown that not all of our members are aware that we want and need their help. Also, some don't think they can volunteer because they don't have a car or don't live in a big city. Some don't know what needs to be done and how they can help.

This guide aims to provide support, tips and strategies to help districts attract district executive members – and to keep them engaged and feeling appreciated.

## Benefits of volunteering

Beyond the personal satisfaction of helping, volunteers often want to know "What's in it for me?" Plenty! RTOERO volunteers say they benefit from:

- Keeping their existing skills sharp
- Sharing their skills and interests with others
- Developing new skills
- Getting to know new people
- Enjoying friendly, social interactions with fellow RTOERO members
- Giving back and being part of something bigger than themselves

Learn what drives your volunteers. Ask new volunteers what they hope to gain by volunteering, and make sure they reach their goals. Ask existing volunteers how they personally benefit from volunteering, and share their successes with other volunteers and prospects. Ask those ending their volunteer term how they benefited (or not), or how you could help improve their experience.

# Pinpoint the volunteers your district needs

Step 1 – Who do you need on your team?

Step 2 – Describe the job in detail

Step 3 – Brainstorm who might be able to help

Step 4 – Recruit your volunteers!

## 1

### Who do you need on your district team?

Core roles in each district are:

- President / past president
- Vice-president
- Treasurer
- Secretary
- Corporate (voting) members and alternatives

Beyond that, most districts have the following district executive roles:

- Community grants representative
- Events coordinator
- Foundation advocate
- Goodwill coordinator
- Marketing and outreach coordinator
- Member at large
- Membership coordinator
- Newsletter editor
- Political advocacy coordinator
- Social media coordinator
- Travel coordinator
- Website manager

Districts may also have volunteers who lead specific clubs (for example, book clubs, walking clubs) and activities (day trips, excursions, etc.).

Who do you already have in place who is willing to stay on?  
Who do you need?

## 2

### Describe the volunteer role

Clearly identify the tasks you require for each of your volunteers. This will become part of the volunteer role highlights. These should include:

- Responsibilities
- Any specific expectations you have of the volunteer (such as attending in-person meetings)
- Skills and/or previous experience helpful for the position
- Resources provided (e.g. training)
- Benefits of the role
- Expected time commitment (be honest but don't scare off potential volunteers!)

See sample role descriptions starting on [page 21](#)

## 3

### Brainstorm who might be able to help

Think about your existing volunteers. Who's staying? Who's leaving? Who else do they know who might be interested in volunteering? Who would be the best person to invite them to volunteer?

Who has helped occasionally and might be encouraged to make a longer commitment? Who would be the best person to ask them?

Think about your personal network. Who has the skills you need? Who might be interested in volunteering? Are you willing to ask them?

Keep succession planning in mind. Who could start in smaller roles and progress to a core role? Who's ready to move to a new role?

**Always be recruiting!**

# 4

## Recruit your volunteers

### 12 tips for recruiting volunteers

1. Ask. Sometimes the only reason someone hasn't volunteered is that nobody asked.
2. Ask soon after someone retires, before they channel any spare time into other volunteer activities.
3. When inviting someone to volunteer, explain the role you have in mind and its value to the district.
4. Ask your volunteers what they get from volunteering with RTOERO, and share these benefits with prospects.
5. Advertise. Share the tasks and positions available, in your newsletter, on your Facebook page, on your website, in district presentations and events. Potential volunteers may not know where they might fit in. See sample volunteer "ads" starting on [page 18](#).
6. Ask current volunteers or contacts to spread the word. Respond promptly to any leads.
7. Start with the core roles. New people in these roles may have others they would recommend.
8. Break down volunteer jobs into smaller tasks and short-term (as little as an occasional hour) as well as defined longer-term commitments. Include tasks that can be done from home or by snowbirds, that don't require a car, or that don't require in-person meetings.
9. Start new volunteers with smaller jobs.
10. Encourage a "buddy system" – get two people to share a position and the work. This may also help with succession planning, making it easier to identify potential successors for each district executive role.
11. Welcome all help. If someone volunteers for a position you have already filled, propose an alternate.
12. Offer a trial period – an opportunity to "shadow" a current district executive member or to try out a volunteer role.
13. Make sure your volunteers know you appreciate their help. Check in often to see if they have any issues or need assistance.





## Best practices for volunteer recruitment

- Ask directly – through personal face-to-face or telephone conversations.
- Ask new volunteers what they hope to gain by volunteering, and make sure you help them reach their goals.
- Ask existing volunteers how they personally benefit from volunteering, and share their successes with prospective volunteers.
- Ask those ending their volunteer term how they benefited or how their volunteer experience could have been improved.
- Provide a clear role description.
- Get to know members – it's easier to ask them to volunteer when you have a personal connection.
- Start with members who are keen RTOERO supporters, but who are not volunteers yet.
- Make sure to reach out to members with diverse backgrounds, perspectives and life experiences.
- Host a fun "meet and greet" for members who are thinking about volunteering.
- Offer options of involvement – make sure there are ways for members to start with a small volunteer commitment, as a way of trying out the experience, before making a major commitment.



## Creating a positive volunteer experience

Once your volunteers are on board, you want their experience to be a good one.

- Have clear policies and procedures in place and regularly review how you manage volunteers.
- Ask experienced volunteers to help mentor new volunteers.
- Establish positive relationships and support and encourage your volunteers. Make them feel part of the team.
- Ensure their volunteer position meets their expectations. Is there a good fit between the volunteer and the job?
- Give volunteers the orientation and skills training they need.
- Recognize volunteer work, both formally and informally, in your local newsletter, at district meetings, through certification of recognition from the RTOERO office.
- Ask for feedback. Check in regularly to see how your volunteers are doing.



## Four best practices in volunteer retention

### 1. Create a quality volunteer experience

- Meet volunteer expectations.
- Provide the right amount of support and recognition.
- Make volunteers feel part of a team.
- Give volunteers respect and involve them in decision-making.
- Provide meaningful work and ensure their time is well spent.

### 2. Develop district “ambassadors” by making sure that!

- Volunteers see value in their contributions.
- Volunteers see the impact of what they do and the positive effects on whom they serve.

### 3. Provide support. Volunteers know and understand that:

- Orientation and training will be provided.
- They are part of a team of people working together.

### 4. Make sure volunteers receive more than they give. This occurs when volunteers:

- Gain additional skills through training and resources provided by the district and RTOERO.
- See positive change has occurred.
- Feel their contributions are appreciated.



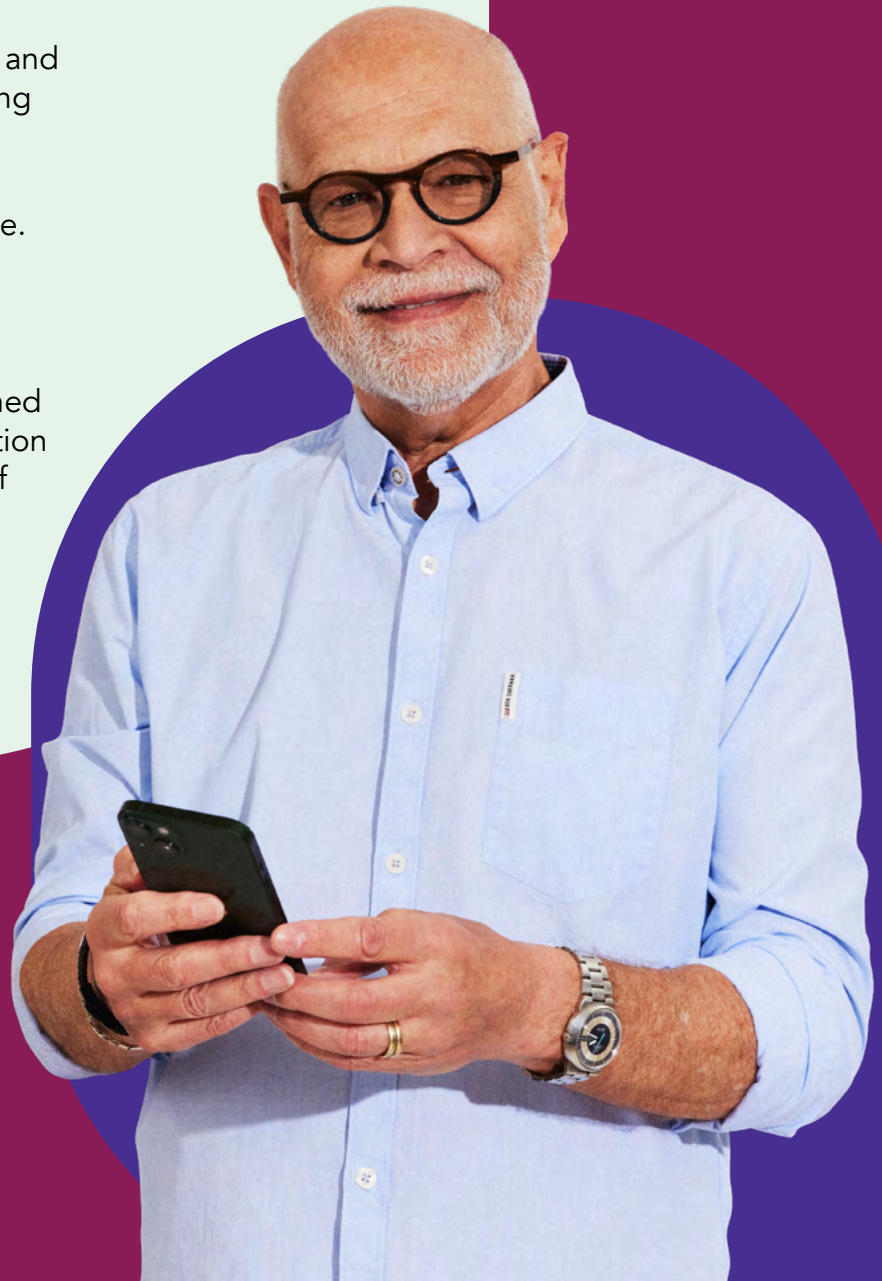
## Succession planning

Succession planning is an ongoing process for districts to identify and develop capable and skilled leaders who can fulfill key roles when they become open. It considers existing district needs and future strategic direction.

### Why is succession planning important?

Succession planning provides many benefits to your district, including the following:

- Maintains organizational memory and volunteer contributions of outgoing members.
- Attracts new people to sustain necessary skill sets and knowledge.
- Identifies people with skills and experience that align with future strategic direction of the district.
- Provides proactive and well-planned recruitment, training and recognition for current and future members of your district executive.





## 5 steps to developing a district succession plan

### 1. Identify roles for succession

- Identify key roles first, and not individuals you want to recruit.
- Do this by thinking about the impact to the district if the position was vacant or left unfilled.
- Ask yourself if there are immediate position terms that are coming to an end.
- Key positions will be different for every district and will evolve over time.
- As you gain people and better systems, create succession plans for all district executive positions.

### 2. Identify key skills required

- Identify the skills, experience and knowledge required for key positions, to meet district needs – now and in the future.
- Include skills such as leadership, technical competency, detail focused, networking, problem-solving or previous volunteer or board experience.
- Have role descriptions for each position, to identify the skills, experience and knowledge required. See role descriptions starting on [page 21](#).

### 3. Identify potential volunteers

- Identify who is currently in the role and who is in the resource pool that matches the skills, experience & knowledge required.

- Goal is to always have an identified person to act as a back-up.
- You are almost ready to start volunteer recruitment:
  - Think about the methods that will best align with the individuals on your list.
- When engaging with existing volunteers and community members, have the list handy of position(s) needed and the skills, values & characteristics required for each position.

### 4. Find people who believe in RTOERO mission, vision, values

When thinking about who might be a good fit for a district executive role, look for members who are:

- passionate about RTOERO
- committed to the RTOERO mission, vision and values
- enthusiastic about being part of a team and collaborating with the other members of your district executive
- motivated by the opportunity to share their skills and experience to benefit the members of your district

Previous skills and experience related to the role are an asset, but training can provide an enthusiastic and dedicated member with the skills for the role.

## 5. Provide training and orientation

Once you have great people, you need to invest in them by providing a robust orientation and training.

Create an orientation guide (for example, a Google folder) that includes the following elements:

- RTOERO strategic plan and brand
- Role description
- List of district executive members, with contact information
- Minutes of district executive meetings
- Meeting schedule
- Calendar of district events
- Link to RTOERO Learning – [rtolearning.rtoero.ca](http://rtolearning.rtoero.ca) – with training resources, including *District Executive Guide* and other resources provided for the specific role
- RTOERO policies and by-law
- District routines and practices

Provide ongoing training and mentorship for new district executive members to make sure they understand their role and feel well-supported.

- Match the new volunteer with an experienced member of the district executive.
- Establish a mentorship plan for a defined transition period.
- Check in regularly with the new volunteer to determine additional training and support that might be helpful and to answer any questions



## Implementing your district succession plan

- Create a subcommittee or working group of district executive members to lead succession planning. The past president may be a good choice to lead this group.
- Designate the person responsible for recruiting for each executive role and for reporting to the group.
- Make succession planning a standing agenda item for district executive meetings.

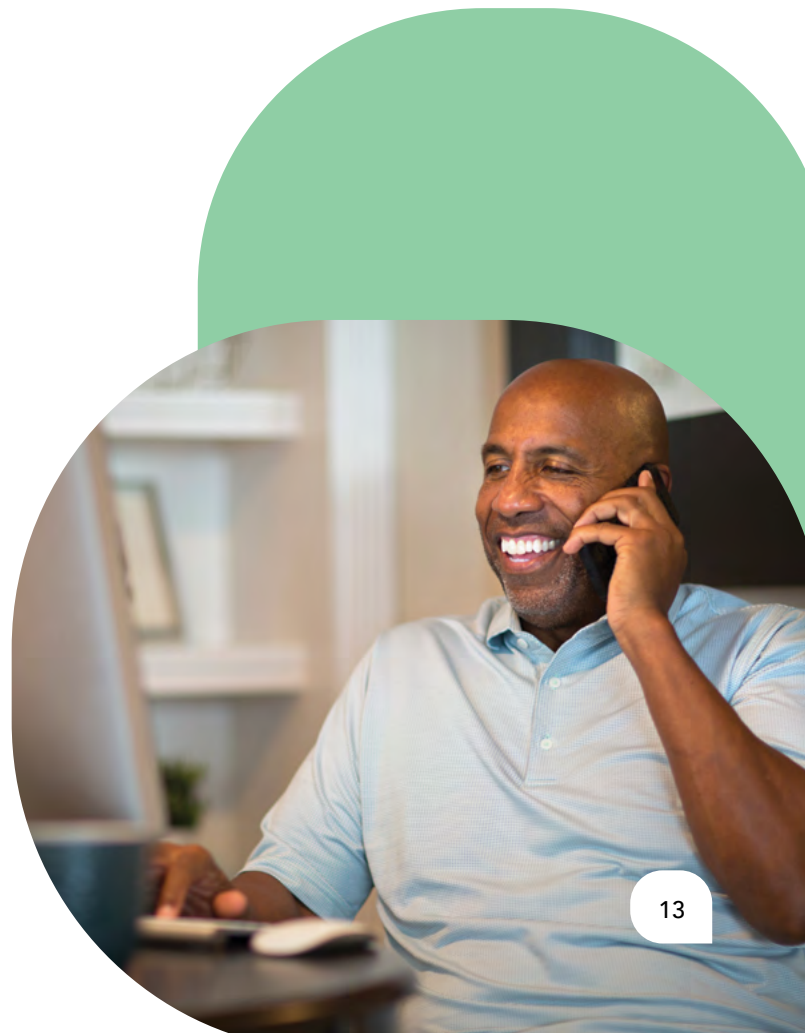
### Monitor and evaluate

Choose measurable indicators for the main priorities of your plan. Here are questions to ask when monitoring and evaluating the succession plan:

- Have we designated people to recruit for specific roles, and is there follow-through when we debrief at meetings?
- How many existing volunteers stepped into new roles? Do their skills and experience match the positions?
- Do all key district executive roles have two prospective successors identified?
- Are role descriptions up-to-date?
- What feedback have we received on the orientation/onboarding process?
- Have we collected feedback from our district executive members to help us improve?

### Adapt your plan

- Succession plans are living documents. The district succession plan should be adapted and updated regularly.
- Regularly review and evaluate volunteer recruitment outcomes:
  - What recruitment method(s) are most effective?
  - What aspects of our volunteer recruitment and succession plan need to be improved?
  - Based on regular monitoring and discussions as a district executive, decide how the succession plan needs to be changed to meet your district's needs.



## Succession planning template

### Volunteer role

Complete chart for each district executive role

### Skills, competencies, experience needed in the role

List the key skills, experience, competencies and qualities needed in the role.  
For example:

- Previous experience in a similar volunteer or professional role  
Previous volunteer experience with your district
- Detail oriented
- Interested in learning new role  
Passionate about RTOERO and serving members of your district

### Current person in role and date term of office ends

Name of the volunteer in the role, as well as date that the term of office ends or the person plans to step back from the role (if applicable)

### Potential successors

Names of at least 2 district members who are potential successors

### Planned succession activities

List activities completed or planned to introduce the potential successors to the role. For example:

- Candidate A will take an active supporting role in the portfolio (e.g. co-editor)
- Candidate B will complete training modules on LMS for the role
- Candidates will attend district executive meetings as members-at-large
- Candidates will review relevant RTOERO policies and District Executive Guide



# Appendix

“I’m proud of RTOERO and willingly volunteer my time and appreciate all the help we get.”



"I am happy to be part of the RTOERO district executive team!"



## Appendix A – 5 tips for better meetings

There's no getting away from meetings, even in a volunteer setting. But forcing volunteers to attend too many meetings or letting meetings go on too long may make volunteers think twice about staying.

Follow these five tips to keep meetings to a minimum and to make them as painless as possible:

### 1. Don't hold unnecessary meetings

How often does your team need to meet? Can meetings be held less often, or over Zoom rather than in person? Can you sometimes accomplish your goals using email?

### 2. Set and keep to a schedule

Schedule routine meetings at a time convenient to most participants. Start the meeting on time and end it on time, or even better, end it early. Those who arrive late will soon find out you mean business!

### 3. Be prepared and help participants be prepared

Distribute the meeting agenda and any background material at least a day before the meeting so everyone has time to review it.

Tell participants what the meeting is meant to accomplish and if they have a specific role.

### 4. Stay on topic

Keeping to your schedule is easier if you stay on topic. If someone goes off on a tangent for too long, gently guide the person back to the agenda.

### 5. End meetings with next steps and who is to take them

End the meeting by summarizing the following:

- **What** – list the actions/deliverables to be completed
- **Who** – for each deliverable, identify the person who is responsible for making sure the action is completed
- **When** – for each deliverable or action, identify the specific completion deadline

## Appendix B – Sample volunteer “ad” wording

Select and adapt from the suggested wording below to create a volunteer “advertisement” in your district newsletter, in an eblast to members, on your district website and/or on your district Facebook page.

### **Our district runs on volunteers – and we’re looking for your help**

RTOERO members are known for volunteering with family, friends, work and the community. But did you know your help is welcome within RTOERO, too? We have a range of volunteer opportunities.

#### **Vice-president**

Are you passionate about providing leadership to the district executive and serving as the key liaison with the RTOERO office and the board of directors? If so, use your leadership skills and have fun doing it!

#### **Secretary**

Would you enjoy working with the district president to organize meetings and prepare meeting minutes and correspondence? This may be the opportunity for you!

#### **Treasurer**

Do you have a knack for numbers and like to use technology to keep everything organized? Use your love of math and technology in this important district executive role!

#### **Community grants coordinator**

Are you passionate about your community and RTOERO? Use your local connections and commitment to coordinate our district’s grants program.

#### **Events coordinator**

Are you a party planner extraordinaire? Turn your knack for creating fun and memorable events into an important role on our district executive, helping to engage our members!

#### **Foundation advocate**

Do you believe in a society in which all seniors live with dignity and respect? Volunteer as our RTOERO Foundation advocate and be part of a unique and impactful philanthropic effort.



### **Goodwill coordinator**

Are you passionate about helping members of our district at times when they need extra support and care? Volunteering as our goodwill coordinator could be for you!

### **Health coordinator**

Are you a wellness maven? Consider contributing to the healthy, active retirement journey of our members as our district's health coordinator!

### **Marketing and outreach coordinator**

Are you an enthusiastic brand ambassador for RTOERO and our district? Consider joining our executive as our district marketing and outreach coordinator, connecting with future members!

### **Member at large**

Are you passionate about RTOERO and our district and interested in becoming more involved – but not sure where your talents and experience might best fit? Volunteering as a member-at-large could be for you!

### **Membership coordinator**

Are you passionate about RTOERO and our district – and dedicated to the value of volunteerism? Joining our district executive as the membership coordinator could be for you!

### **Newsletter editor**

Are you a word nerd? Is writing your passion? Turn your love of storytelling into a vital communications role for our district – showcasing members and keeping them up-to-date on all the district news!

### **Political advocacy coordinator**

Do you have a lifelong passion for politics and political issues? Have you been actively involved in the political process (campaigning, letter writing, etc.) in the past? Consider contributing your enthusiasm for democracy and civic engagement as our district's political advocacy coordinator!

### **Social media coordinator**

Are you a social media butterfly? Do you enjoy connecting online with your Facebook friends? Consider this exciting role managing our district Facebook page!

### **Travel coordinator**

Do you have the travel bug? Are you the person who organizes the travel arrangements for family and friends? Turn your wanderlust into a volunteer role where you will meet other travel enthusiasts in our district!

### **Website coordinator**

Are you tech-savvy, with a keen interest in digital communications? Volunteering as our district website manager could be for you

### **Benefits of volunteering**

Volunteering as a member of our district executive has a lot to offer, including making new friends, sharing your knowledge and interests, learning new skills – and having fun!

### **Learn more**

Contact our district president [insert president name and email address] to learn more and find out if this volunteer role is for you!

## Appendix C – Role descriptions for district roles

### President/Vice-President

The president steers the district executive and acts as main liaison with RTOERO staff and board. The president takes the lead, supported by the vice-president and past president. The vice-president automatically succeeds to the role of president and then past president.

### Responsibilities

- Oversee all activities of the executive at the district level
- Lead and ensure that district activities align with RTOERO's strategic plan
- Lead all district executive meetings
- Attend RTOERO Zoom meetings with the board of directors and committees
- Attend the annual RTOERO Presidents Workshop
- Convene and chair regular and special meetings for district members
- Serve as an ex-officio member on all district committees
- Respond to requests from RTOERO board of directors, committees and staff on behalf of the district, as requested
- Act as a signing officer for the district
- Prepare the district's annual report

### Skills and experience helpful for this role

- Leadership experience
- Knowledge of RTOERO and the district
- Comfort presenting to a group
- Technology skills
- Commitment to RTOERO and its mission, vision, values and strategic goals

### Training and resources provided

- Annual Presidents Workshop in Toronto
- *District Executive Guide* and *RTOERO Volunteer Guide*
- *RTOERO Learning* – [rtolearning.rtoero.ca](http://rtolearning.rtoero.ca)
- Support from board liaison
- One-to-one support and training from RTOERO staff

### Benefits of this role

- Opportunity to attend annual Presidents Workshop in Toronto
- Sharing leadership skills and making a difference
- Having fun leading and socializing with the district executive

### Time commitment

- An average time commitment of 2-3 hours per week. Most work can be performed remotely, with occasional travel to meetings or training.

## **Secretary**

Works with the president to prepare meeting minutes and correspondence.  
You are the glue that holds the district together!

### **Responsibilities**

- Prepare and present minutes of any meetings called by the president
- Prepare correspondence as required for the district executive
- Notify members of upcoming and scheduled meetings
- Coordinate the annual meeting of members and other meetings as required
- Prepare and distribute agenda and minutes for all meetings
- Maintain a record of attendance for all Board of Directors meetings.

### **Skills helpful for this role**

- Commitment to RTOERO and its mission, vision, values and strategic goals
- Knowledge of RTOERO and the district
- Excellent organizational and communication skills
- Computer literacy, including proficiency with Microsoft Office and Zoom
- Minute-taking experience is an asset

### **Training and resources provided**

- *District Executive Guide*
- Training and mentorship from other members of the district executive
- *RTOERO Learning* – [rtolearning.rtoero.ca](http://rtolearning.rtoero.ca)

### **Benefits of this role**

- Sharing leadership skills and making a difference
- Having fun socializing with the district executive

### **Time commitment**

- An average time commitment of 4-6 hours per month. Most work can be performed remotely, with occasional travel to meetings and training.



## **Treasurer**

The district treasurer keeps the financial accounts of the district up-to-date and has signing authority for expenses. The treasurer also helps prepare annual district budgets.

### **Responsibilities**

- Provide regular reports on district financials
- Work with the district executive to prepare an annual budget
- Pay invoices as directed by the district executive
- Receive a financial statement for the fiscal year from the chair of a standing or special committee that is handling district money and the Treasurer of any Unit
- Present an annual district financial statement, reviewed by at least two district members, at least one month before the district's annual meeting
- Manage the district budget, and reconcile bank and investment account statements
- Pay all approved expenses or disbursements and ensure cheques are co-signed
- Monitor and report any significant variations between actual financial results and the budget to the district executive
- Coordinate the preparation of annual financial reports for the district annual meeting and the RTOERO office
- Provide annual reviewed financial statements at the district's annual general meeting.

### **Skills helpful for this role**

- Knowledge of basic accounting practices and procedures and financial management planning principles
- Knowledge of or ability to learn Excel
- Knowledge of or ability to learn QuickBooks
- Computer literacy, especially in the use the Chromebook and QuickBooks provided by RTOERO
- Commitment to RTOERO and its mission, vision, values and strategic goals

### **Training and resources provided**

- *District Executive Guide*
- RTOERO Treasurers Guide
- One-to-one QuickBooks training by RTOERO finance department staff
- Training and mentorship from other members of the district executive
- *RTOERO Learning* – [rtolearning.rtoero.ca](http://rtolearning.rtoero.ca)

### **Benefits of this role**

- Sharing leadership skills and making a difference
- Having fun socializing with the district executive

### **Time commitment**

- An average time commitment of 6-8 hours per month.

## **Community grants coordinator**

The community grants coordinator takes the lead in organizing the district's annual submission for the RTOERO Community Grants program, as well as ongoing communication with current grant recipient agencies in the community.

### **Responsibilities**

- Coordinate the district submission for the RTOERO Community Grants program, with input from the other members of the district executive
- Monitor application timelines and requirements
- Attend information session about the grant application process
- Share the news release about the district grant (provided by RTOERO office) with local media
- Coordinate an event to present the grant donation to the community organization that is that grant recipient
- Collaborate with the newsletter editor, social media coordinator and website coordinator to share news about the grant with members and the community
- Communicate regularly with community organizations that are current and past grant recipients, to share information in district communications about the status and impact of the grants
- Complete required reports and submit them to the Community Grants and Scholarships Committee
- Attend district executive meetings

### **Skills helpful in this role**

- Commitment to RTOERO and its mission, vision, values and strategic goals
- Knowledge of RTOERO and the district
- Previous volunteer experience is an asset

### **Training and resources provided**

- *District Executive Guide*
- RTOERO policies
- Training and mentorship from other members of the district executive
- RTOERO website – [rtoero.ca/giving-back/grants](http://rtoero.ca/giving-back/grants)
- *RTOERO Learning* – [rtolearning.rtoero.ca](http://rtolearning.rtoero.ca)

### **Benefits of this role**

- Sharing leadership skills and making a difference
- Having fun socializing with the district executive

### **Time commitment**

- An average time commitment of 4-6 hours per month during the grant application process and 1-2 hours per month at other times.

## **Events coordinator**

The events coordinator plans the logistics for signature district events such as seasonal lunches, welcome breakfast for new retired members in September, golf tournaments, etc.

### **Responsibilities**

- Collaborate with the other members of the executive to develop the special event plan for the district for the year
- Collaborate with the district president and treasurer to develop a budget for each event and to monitor event expenses and revenue
- Coordinate all event logistics, such as booking the venue, planning the menu and coordinating volunteers needed to assist with the event
- Recruit a team of volunteers to support event promotion and logistics
- Collaborate with the district newsletter editor, social media coordinator and website coordinator to promote the events to members through print and digital communication channels
- Attend district executive meetings

### **Skills helpful in this role**

- Commitment to RTOERO and its mission, vision, values and strategic goals
- Knowledge of RTOERO and the district
- Previous event planning experience is an asset

### **Training and resources provided**

- *District Executive Guide*
- RTOERO policies
- Training and mentorship from other members of the district executive
- *RTOERO Learning* – [rtolearning.rtoero.ca](http://rtolearning.rtoero.ca)

### **Benefits of this role**

- Sharing leadership skills and making a difference
- Having fun socializing with the district executive

### **Time commitment**

- An average time commitment of 6-8 hours per month leading up to an event and 1-2 hours per month at other times.

## Foundation advocate

The foundation advocate is passionate about the work of the RTOERO Foundation and believes in the vision of a society in which all seniors live with dignity and respect.

### Responsibilities

- Act as a liaison between the foundation office and their district
- Actively promote the work of the foundation at a district level by reporting at executive meetings through presentations or written reports, and providing updates in newsletters and other channels as required
- Encourage donations to the foundation (i.e. through tribute giving) and help with active fundraising campaigns (i.e. promoting 50/50 draws, silent auctions, Giving Tuesday)
- Collaborate with the newsletter editor, social media coordinator and website coordinator to ensure Foundation information and news is widely distributed
- Collaborate with the goodwill coordinator to promote the Foundation's tribute giving program in which districts can donate in honor or in memory of their members
- Be familiar, and stay up-to-date, with the Foundation's campaigns, events and communications schedule
- Answer any questions that arise within the district and/or direct questions to Foundation staff

### Skills helpful in this role

- Commitment to the RTOERO Foundation and its mission, vision, values and strategic goals
- Familiarity with the Foundation's outreach, awareness and communications plan
- Previous volunteer experience is an asset

### Training and resources provided

- RTOERO Foundation website – [rtoerofoundation.ca](http://rtoerofoundation.ca)
- RTOERO Foundation strategic plan
- *Embrace Aging and The Loop* (Foundation newsletters)
- *News You Can Use* monthly emails
- Communication with Foundation staff
- *RTOERO Learning* – [rtolearning.rtoero.ca](http://rtolearning.rtoero.ca)

### Benefits of this role

- Contributing to a unique and impactful philanthropic effort
- Helping to grow a funding program that supports critical research and community programming that benefits older adults across Canada

### Time commitment

- An average time commitment of 2-4 hours per month

## **Goodwill coordinator**

The goodwill coordinator organizes activities to celebrate member milestones and to provides support for members in times of illness or bereavement.

### **Responsibilities**

- Recruit a team of volunteers to support event promotion and logistics
- Send birthday cards and personalized cards to members
- Coordinate phone calls and other outreach to members
- Coordinate the celebration of significant milestones of district members, including anniversaries, special birthdays and accomplishments
- Coordinate the recognition of milestone membership – those in your district who have been members of RTOERO for 25, 30, 35, 40, 45 and 50+ years
- Collaborate with other members of the district executive on the planning of special luncheons and other activities designed to honour and recognize milestones and accomplishments
- Coordinate personal visits to members, especially in times of sickness or bereavement
- Coordinate transportation support for members who need help getting to district events
- Coordinate ongoing support for members in need of help to assist with errands, attending appointments, letter writing, connecting with community services and more
- Attend district executive meetings
- Attend meetings with Member Services Committee as scheduled

### **Skills helpful in this role**

- Commitment to RTOERO and its mission, vision, values and strategic goals
- Knowledge of RTOERO and the district
- Previous volunteer experience is an asset

### **Training and resources provided**

- *District Executive Guide*
- Goodwill Guidelines for Districts
- RTOERO policies
- Training and mentorship from other members of the district executive
- *RTOERO Learning* – [rtolearning.rtoero.ca](http://rtolearning.rtoero.ca)
- Zoom sessions with Member Services Committee

### **Benefits of this role**

- Sharing leadership skills and making a difference
- Having fun socializing with the district executive

### **Time commitment**

- An average time commitment of 4-6 hours per month.

## **Health coordinator**

The health coordinator plans wellness information and events for district members.

### **Responsibilities**

- Attend the annual Benefits Workshop and share key learnings with the district executive and members
- Be familiar with the content of the Benefits Manual
- Be familiar with the sources of information about the RTOERO group insurance program – including [rtoero.ca/insurance](http://rtoero.ca/insurance), Insurance Plans Booklet, Communiqué, Benefit Committee meeting highlights – and direct members to these resources as needed
- Be familiar with contact information for the plan administrator (Johnson Inc.) and direct members to this information as needed
- Be familiar with contact information for service providers – CloudMD, Global Excel – and direct members to this information as needed
- Collaborate with newsletter editor, social media coordinator and website coordinator to share health and wellness content with members through district communication channels
- In collaboration with the district executive, plan benefits and wellness events and activities, such as “Know your health plans” session, wellness fair, etc.
- Attend meetings of the district executive

### **Skills helpful in this role**

- Commitment to RTOERO and its mission, vision, values and strategic goals
- Knowledge of RTOERO and the district
- Previous volunteer experience is an asset

### **Training and resources provided**

- *District Executive Guide*
- Benefits Manual
- RTOERO policies
- Training and mentorship from other members of the district executive
- Annual benefits workshop in Toronto
- RTOERO website – [rtoero.ca](http://rtoero.ca) - and *RTOERO Learning* – [rtolearning.rtoero.ca](http://rtolearning.rtoero.ca)

### **Benefits of this role**

- Sharing leadership skills and making a difference
- Having fun socializing with the district executive

### **Time commitment**

An average time commitment of 6-8 hours per month.



## **Marketing and outreach coordinator**

The marketing and outreach coordinator connects with prospective members from across the education community in the district – early years, public and private schools, school boards, post-secondary – and welcomes new members who are pre-retirees.

### **Responsibilities**

- Collaborate with other members of the district executive to plan outreach activities to engage with prospective members
- Using marketing and outreach materials provided by the RTOERO office, connect regularly with the district's network of education community contacts to share information and materials about retirement planning and RTOERO membership benefits
- Collaborate with the newsletter editor, social media coordinator and website manager to plan outreach information and messages in district communication channels
- Collaborate with the district membership coordinator to plan and distribute welcome materials for new district members
- Collaborate with other members of the district executive to plan communication, events and activities for new actively employed members
- Attend district executive meetings
- Attend Zoom meetings with the Marketing and Communications Committee and provide district input and feedback

### **Skills helpful in this role**

- Commitment to RTOERO and its mission, vision, values and strategic goals
- Knowledge of RTOERO and the district
- Previous marketing/outreach experience is an asset

### **Training and resources provided**

- *District Executive Guide*
- Guide – Outreach and membership tips for districts
- RTOERO marketing materials – (e.g. Esprit, marketing posters)
- RTOERO policies
- Training and mentorship from other members of the district executive
- *RTOERO Learning* – [rtolearning.rtoero.ca](http://rtolearning.rtoero.ca)
- Zoom meetings with Marketing and Communications Committee
- Bi-annual Marketing and Communications Workshop

### **Benefits of this role**

- Sharing leadership skills and making a difference
- Having fun socializing with the district executive

### **Time commitment**

An average time commitment of 6-8 hours per month.

## **Member at large**

The member at large role is an opportunity to learn more about the district and the other roles on the executive.

### **Responsibilities**

- Collaborate with the other members of the executive to support district activities, programs, services and events
- Attend meetings of the district executive
- Participate in district events and activities as requested
- Undertake special projects as determined by the district executive
- Participate in training and mentorship provided by the district and RTOERO

### **Skills helpful in this role**

- Commitment to RTOERO and its mission, vision, values and strategic goals
- Knowledge of RTOERO and the district
- Previous volunteer experience is an asset

### **Training and resources provided**

- *District Executive Guide*
- RTOERO policies
- Training and mentorship from other members of the district executive
- *RTOERO Learning* – [rtolearning.rtoero.ca](http://rtolearning.rtoero.ca)

### **Benefits of this role**

- Sharing leadership skills and making a difference
- Having fun socializing with the district executive

### **Time commitment**

- An average time commitment of 4-6 hours per month.

## **Membership coordinator**

The membership coordinator helps to plan programs, services and activities for district members and takes the lead on volunteer recruitment and succession planning for the district.

### **Responsibilities**

- Collaborate with the district executive to plan programs, services and events for district members
- In collaboration with the district president and past president, develop succession plan for all district executive roles
- Organize the recruitment, orientation, training and recognition of district executive members and other district volunteers
- Receive monthly membership lists from the RTOERO office
- Prepare welcome packages and phone calls to new members each month based on the change report
- Collaborate with the district executive to honour milestone members who have been members of RTOERO for 25, 30, 35, 40, 45 and 50 years
- Collaborate with the Goodwill coordinator and volunteers regarding programs and services designed to engage with members who are in hospital, isolated due to illness or in other ways in need of support
- Attend meetings of the district executive
- Attend Zoom meetings with the Member Services Committee and provide district feedback and input to the committee

### **Skills helpful in this role**

- Commitment to RTOERO and its mission, vision, values and strategic goals
- Knowledge of RTOERO and the district
- Previous experience coordinating volunteers and/or previous volunteer experience is an asset

### **Training and resources provided**

- *District Executive Guide and Volunteer Guide*
- RTOERO policies
- Training and mentorship from other members of the district executive
- *RTOERO Learning* – [rtolearning.rtoero.ca](http://rtolearning.rtoero.ca)
- Zoom sessions with Member Services Committee
- Member Services Workshop in Toronto (every three years)

### **Benefits of this role**

- Sharing leadership skills and making a difference
- Having fun socializing with the district executive

### **Time commitment**

- An average time commitment of 6-8 hours per month.

## **Newsletter editor**

The newsletter editor is responsible for working with the newsletter team, soliciting member stories and submissions, planning and organizing all aspects of the newsletter writing, editing and production, monitoring deadlines and distributing the newsletter by mail and eblast.

### **Responsibilities**

- Establish and manage a newsletter team
- Solicit articles, events and images from the district executive, chairpersons and the district membership for publishing
- Establish dates with the district executive for publications
- Prepare the newsletter using a format suitable for printing and for electronic distribution, using newsletter template provided – [rtoero.ca/brand-resources](http://rtoero.ca/brand-resources)
- Provide the printing company with the file and mailing list as required
- Determine the distribution method
- Attend executive meetings
- Prepare budget for newsletter costs
- Coordinate with the website manager and social media manager to share newsletter content on the district website and Facebook page
- Attend workshops provided by RTOERO

### **Skills helpful for this role**

- Strong writing and editing skills
- Previous experience writing and editing for newsletters is an asset
- Commitment to RTOERO and its mission, vision, values and strategic goals
- Knowledge of RTOERO and the district

### **Training and resources provided**

- *District Executive Guide*
- RTOERO policies, including district newsletter policy
- Brand resources – [rtoero.ca/brand-resources](http://rtoero.ca/brand-resources)
- RTOERO editorial guide
- Training and mentorship from other members of the district executive
- *RTOERO Learning* – [rtolearning.rtoero.ca](http://rtolearning.rtoero.ca)
- *News you can use* – monthly email of newsletter articles
- Zoom training sessions
- Bi-annual Marketing and Communications Workshop in Toronto

### **Benefits of this role**

- Enjoy being creative!

### **Time commitment**

- On average, 10-15 hours per issue of the newsletter.

## **Political advocacy coordinator**

The political advocacy coordinator organizes district advocacy activities, in collaboration with the president and district executive, focused on one or more of the advocacy topics established by the RTOERO board of directors.

### **Responsibilities**

- Recommend actions and activities to the district executive to support achievement of RTOERO advocacy goals and initiatives
- Promote and report on political advocacy activities
- Coordinate the activities of other district political advocacy volunteers
- Manage an annual political advocacy budget, as determined by the district president and treasurer
- Liaise with community organizations that share common advocacy views and issues at the provincial and federal levels in the best interest of district members
- Represent the district at meetings and workshops organized by the RTOERO Political Advocacy Committee
- Communicate with the RTOERO Political Advocacy Committee through the assigned committee liaison person for the district
- Serve as a member of the district executive
- Attend all relevant meetings as scheduled

### **Skills helpful for this role**

- Commitment to RTOERO and its mission, vision, values and strategic goals
- Knowledge of and commitment to RTOERO's advocacy issues as determined by the board of directors
- Knowledge of RTOERO and the district
- Presentation skills
- Technology skills

### **Training and resources provided**

- *District Executive Guide*
- Political Advocacy Toolkit
- Regular Zoom meetings with liaison member of Political Advocacy Committee
- Training and mentorship from other members of the district executive
- *RTOERO Learning* – [rtolearning.rtoero.ca](http://rtolearning.rtoero.ca)

### **Benefits of this role**

- Sharing leadership skills and making a difference
- Having fun socializing with the district executive

### **Time commitment**

- An average time commitment of 6-8 hours per month.

## **Social media coordinator**

The social media coordinator manages district social media platforms (currently limited to Facebook or Twitter). The social media coordinator creates, shares and manages content (images, videos, written posts) to engage with current and future RTOERO members about news, events, community events, publications and articles. The social media coordinator monitors, listens, responds and encourages social engagement and involvement as recommended by RTOERO.

### **Responsibilities**

- Create and/or share relevant content supporting RTOERO initiatives
- Monitor and respond to users in a social way to encourage engagement
- Promote and celebrate RTOERO events
- Perform duties in accordance with the RTOERO social media policy
- Attend district executive meetings
- Attend quarterly Zoom sessions with other district social media managers and RTOERO staff
- Attend Zoom meetings with Marketing and Communications Committee as scheduled and provide district input and feedback

### **Skills helpful for this role**

- Commitment to RTOERO and its mission, vision, values and strategic goals
- Knowledge of RTOERO and the district
- Passion for serving the district by connecting and sharing with other members
- Basic knowledge of working with Facebook and Twitter or willingness to learn

### **Benefits of this role**

- Using your social media skills and interest to provide a service to your district
- Staying connected with RTOERO members
- Interactive relationship with district members
- Having fun learning and socializing!

### **Training and resources provided**

- *District Executive Guide*
- Brand resources – [rtoero.ca/brand-resources](http://rtoero.ca/brand-resources)
- Training and mentorship from other members of the district executive
- *RTOERO Learning* – [rtolearning.rtoero.ca](http://rtolearning.rtoero.ca)
- Quarterly Zoom training sessions
- Bi-annual Marketing and Communications Workshop in Toronto

### **Time commitment**

- On average, 1-2 hours per week.



## **Travel coordinator**

The travel coordinator plans excursions and other group travel opportunities for district members, based on the interests of members and with support from the RTOERO travel partner.

### **Responsibilities**

- Collaborate with the other members of the executive to develop a calendar of group travel opportunities for the district for the year – for example, day trips, theatre excursions, destination travel within and/or outside of Canada
- Gather input from members regarding preferred types of travel opportunities
- Collaborate with the district president and treasurer to develop a budget for each travel event and to monitor event expenses and revenue
- Coordinate all logistics related to the excursion, such as booking the transportation and destination venue(s), promoting the travel opportunities, collecting bookings and payments, etc.
- Recruit a team of volunteers, if needed, to support the promotion and logistics of the travel events
- Collaborate with the district newsletter editor, social media coordinator and website coordinator to promote the travel opportunities to members through print and digital communication channels
- Attend district executive meetings

### **Skills helpful in this role**

- Commitment to RTOERO and its mission, vision, values and strategic goals
- Knowledge of RTOERO and the district
- Previous experience organizing group travel is an asset

### **Training and resources provided**

- *District Executive Guide*
- RTOERO policies
- Training and mentorship from other members of the district executive
- *RTOERO Learning* – [rtolearning.rtoero.ca](http://rtolearning.rtoero.ca)

### **Benefits of this role**

- Sharing leadership skills and making a difference
- Having fun socializing with the district executive
- Connecting with other district members who love to travel

### **Time commitment**

- An average time commitment of 6-8 hours per month leading up to a group travel event and 1-2 hours per month at other times.

## **Website coordinator**

The website manager keeps the content on the district website up-to-date.

### **Responsibilities**

- Participate in individualized orientation and ongoing training regarding how to post content to the district website and how to use other website functionality (e.g. forms, event registration)
- Collaborate with the newsletter editor and social media coordinator to plan for regular content updates to the district website
- Collaborate with all members of the district executive to identify content to be posted on the website and to create and schedule posts
- Post blogs, news and other district content on the website in a timely manner
- Attend district executive meetings
- Attend Zoom meetings with the Marketing and Communications Committee to receive information and to provide district input and feedback
- Attend bi-annual in-person Marketing and Communications Workshop in Toronto

### **Skills helpful in this role**

- Commitment to RTOERO and its mission, vision, values and strategic goals
- Knowledge of RTOERO and the district
- Computer and written communication skills
- Previous experience with WordPress or the interest to learn

### **Training and resources provided**

- *District Executive Guide*
- RTOERO policies – including district website policy and guidelines
- Individualized website orientation and regular training sessions
- Training and mentorship from other members of the district executive
- *RTOERO Learning* – [rtolearning.rtoero.ca](http://rtolearning.rtoero.ca)

### **Benefits of this role**

- Sharing leadership skills and making a difference
- Having fun socializing with the district executive
- Opportunity to learn and use the most up-to-date website technology

### **Time commitment**

- An average time commitment of 1-2 hours per week.

## Appendix D – Template volunteer role description

One or two sentence summary of the volunteer role.

### Responsibilities

- In point form, list the responsibilities of the volunteer role
- List specific expectations of the role (such as attending in-person meetings)

### Skills helpful for this role

Example:

- Commitment to RTOERO and its mission, vision, values and strategic goals
- Knowledge of RTOERO and the district
- Communication and organizational skills
- Computer literacy
- Previous volunteer experience related to the volunteer role

### Training and resources provided

- List key training and resources provided to support the volunteer role, including *RTOERO Learning* – [rtolearning.rtoero.ca](http://rtolearning.rtoero.ca)

### Benefits of this role

- List key benefits of volunteering for this role, including the social interaction and fun of being part of the district executive, learning new skills, giving back and making a difference

### Time commitment

- Average time commitment per week or month

## Appendix E – 6 monumental benefits of volunteering

### Healthy body

Volunteering will keep you physically healthier, with fewer stress-related illnesses and will help you live longer.

### Emotional health

You will enjoy higher self-esteem and better mental health as a result of volunteering.

### New friends

Social interaction is key to a healthy lifestyle at any age, and volunteering connects you with like-minded people.

### Sharp brain

Volunteering helps you learn new skills and maintain brain acuity.

### Time affluence

Ironically, giving away your time actually makes you feel less busy.

### Happiness

Those who volunteer are happier than those who don't, because they are sharing their passions and feel they're making a difference.

"I'm proud to be part of RTOERO  
and the mission it serves."





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