



# Member Engagement

# VOLUNTEER TEAM

# HANDBOOK

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Catholic United  
**Financial**



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## What is Catholic United Financial?

Catholic United Financial is a not-for-profit, fraternal benefit company serving more than 75,000 members in Minnesota, North Dakota, South Dakota, Wisconsin, and Iowa.

### What is a fraternal benefit society?

As a fraternal life insurance company, Catholic United Financial has a special purpose — recognized by the federal government with tax-exempt status. We provide our members with excellent insurance and financial products and we return our profits to our Catholic communities in the forms of grants, scholarships, and assistance. Watch a video about fraternal benefit societies. <https://youtu.be/JCln1xVF6pk>

Catholic United Financial provides our members with quality life insurance and retirement savings options, while giving them opportunities to impact their Catholic parishes, schools and community.

### Become a member and become something more

Catholic United Financial is dedicated to working with you to improve the financial strength of your family, your Church, and your community. We work daily to:

- Help Catholics and their families build a more stable and secure financial foundation
- Encourage and coordinate volunteers through our volunteer team network
- Raise and distribute millions in grants and scholarships
- Provide funds and fundraising support for Catholic parishes and schools
- Connect to the next generation by encouraging young Catholics to explore and develop their faith
- Support Catholic families & communities

### Our Vision

All people are financially secure, faith-filled, and engaged in their communities.

### Our Mission

We financially protect and connect members in faith and joyful service at every step of life's journey.

### Our Compelling Story

Catholic United is a member-owned, not-for-profit financial services company, connecting people of faith, protecting their future and generously impacting parishes, schools and communities.

## Catholic United Member Advisors

Catholic United Financial is dedicated to working with families to improve the financial strength of their family, Church, and community. To do so, we employ Catholic member advisors that live and work alongside families to develop individualized plans that meet their future financial needs. Member advisors support families' life insurance needs and establish membership in a company that helps them align their finances with their faith. Sales Reps often attend the same parish as their members, but due to some large territories, they may be seen at multiple parishes.

In addition to assisting with members personally, member advisors also work with Councils and Volunteer Teams. Every Volunteer Team is assigned a member advisor. If there is not an advisor in the territory of the Volunteer Team, then the Regional Manager is assigned.

### Working with your local member advisor

Member Advisors serve as a partner and as a support to Volunteer Teams. Many Member Advisors have worked for Catholic United for over 10 years and bring a lot of experience from working with many members and Volunteer Teams. They are very knowledgeable on Catholic United programs, working with parishes and schools, recruiting new team leaders and volunteers, and event ideas.

While Member Advisors are partners with Volunteer Teams, they are not team leaders. It is up to the team members to successfully lead the team and have great events. It is very important to the partnership that member advisors are consulted on the dates and invited in advance to team meetings and events, so that they can check their calendars and be sure they are able to attend. Communication with your local Sales Rep is vital to a successful partnership.

### Member Advisors at volunteer team events

Catholic United member advisors will be at events to support the team, to represent Catholic United Financial, and to talk with attendees. During events, if it is appropriate, have a space for the member advisor to display Catholic United Financial materials and encourage others to meet the Rep, so that together you can educate others on the benefits of Catholic United Financial for their family and the community. By sharing about Catholic United Financial and what it does you will increase your likelihood of recruiting others to also be volunteers, team leaders, and to become Catholic United members.

### Growing membership

For Catholic United Financial to continue to carry out their mission to support Catholic communities, it must continue to grow in membership. The best way to make this happen is through referrals from current members who know the value of our products and are passionate about supporting their Catholic community. If you know someone who is also passionate about their Catholic community, gets involved in events, has a growing family, or specific financial needs please tell them about the benefits of Catholic United Financial and share their name and contact information with your local member advisor. The more people that get involved, the more parishes that will benefit.

## What is a Catholic United Volunteer Team?

Catholic United Volunteer Teams serve as the local platforms within Catholic parishes and schools for funding and encouraging faith-based education and faith-fueled volunteer service for every generation. These teams serve with the support of Catholic United Financial by working with the parish staff, priest, school staff, or principal. Their role is to be present in their parishes and to create events that will contribute to the success of their parish or school and parish families by building community.

### Tax Information

Each Catholic United Volunteer Team is assigned a Tax ID number to use for all team-related purchases. Catholic United Financial files your team's 990N with the IRS and will maintain the 501(c)8 designation.

Catholic United is not exempted from sales tax and as subsidiary organizations, Catholic United Volunteer Teams are also not exempted from sales tax.

### Checking Accounts

Catholic United Volunteer Teams must maintain an autonomous account (checking). Any new accounts should be created at the Catholic United Financial Credit Union for team funds. The Member Engagement Department will use this account information to directly deposit funds for programs throughout the year. The Administrative Coordinator and Team Director should be authorized to sign checks, but their names do not need to be included on the checks themselves. Signers cannot be from the same household or related. The Director of Member Engagement as well as the Director of Finance will also be included as signers on the volunteer team accounts. Checking accounts should be named in the following manner:

St. Isidore VT #760  
Catholic United Financial  
Lake Wobegone, MN 56789

It is recommended that the group keep a small cushion of funds at the end of each year to support activities for the start of the next calendar year.

## Leadership Stipend

In the first quarter of every year, Catholic United Financial will send a leadership stipend to the team in the amount \$100 per team leader. This stipend is meant as a ‘thank you’ for the hard work you have done the previous year to support your local faith community. Catholic United encourages that this money be used for team development but does not place any restrictions on how the team spends the stipend.

## Star Status

Each year the Catholic United Volunteer Team will be awarded a star status based on the number of activities, donations, and meetings throughout the year. The number of activities and donations the group carries out is entirely up to each individual team but holding at least four meetings per year is expected of all Catholic United groups. Star status will determine the calculation for the team’s activity allowance each year.

Carrying out social, service, and faith activities as well as putting together team communications and donations will help ensure that the activities the team does throughout the year are eligible to receive star status. Activities that are eligible to receive star status will be determined at the discretion of the Member Engagement Department.

Criteria for whether an activity/event counts toward star status is based on the following:

- ✓ Publicity for the event includes the Catholic United logo (see [Publicity standards](#)).
- ✓ Publicity for the event includes your Member Advisor’s name and contact information.
- ✓ Catholic United members involved in the event planning or implementation of the event.

## Activity Allowance

The Catholic United Volunteer Team will receive an activity allowance in the first quarter of every year to help support their upcoming activities. The activity allowance is based on the previous year’s work and is calculated by the number of meetings held and star status-eligible activities and donations. The amount paid to the group is calculated based on the team’s star status (see the chart below) and the number of adult members (16 and older) assigned to the Catholic United Volunteer Team. \*one must be a Grants4Good service activity

<b>Star Status</b>	<b>Activity Required</b>		<b>Amount</b>
<i>Ranking</i>	<i>Meetings</i>	<i>Activities</i>	<i>Per member</i>
Semi-active team	1	1	\$1.00
Active team	2	4	\$2.00
Silver team	4	8	\$2.50
Gold team	4	12	\$3.00
Platinum team	4	12*	\$3.00

## Catholic United Volunteer Team Programs

## Grants4Good

Grants4Good is a program that allows Catholic United to provide funds to our Catholic United Volunteer Teams that enhance events in parishes and communities. By offering grant opportunities in the areas of social, service, and faith, Catholic communities can thrive and grow in many ways.

Catholic United Volunteer Teams are eligible to receive up to a total of three grants, up to \$500 per activity, in each of the following Grants4Good categories:

- A social-based grant helps create an opportunity or enhance an existing event that supports and encourages family, fellowship, and community.
- A service-based grant helps create an opportunity to bring people together to perform a service or complete a project.
- A faith-based grant helps create an opportunity for spiritual growth or faith development in the parish or community.

## Matching Grant Events

Build community among members and friends of Catholic United by holding a fundraiser in your community and Catholic United will match your efforts with funds to support religious education.

Catholic United Financial provides up to \$2000 in matching funds each year for Catholic United Volunteer Team sponsored fundraisers with the matched funds going to support religious education in some way. Matched funds are based off gross income for an event and are paid 50¢ for every dollar, up to \$2000.

## Member Assistance Grants

Supporting a Catholic United Member in need of financial assistance due to hardship.

Catholic United Financial provides up to \$1000 in matching funds for Council and Catholic United Volunteer Team sponsored fundraisers that support a Catholic United member in need of financial assistance due to some recent hardship. Councils and Catholic United Volunteer Teams can hold multiple Member Assistance Grants in a year and the \$1000 is matched dollar for dollar for each event held throughout the year.

## Activities

The goal of the Catholic United Volunteer Team is to support your parish and community in a variety of ways. Activities that bring people together, enhance and grow the spiritual vitality and faith of your community, and provide needed services to others are the core of what your Catholic United Volunteer Team will do throughout the year. Activities also include the programs available to the Catholic United Volunteer Team. Making use of these programs can help plan your activities throughout the year, bring people together, and promote Catholic United Financial and the work your team is doing to all parishioners and your community.

### Social Activities

A social activity brings people together, creates fellowship, and builds a strong relationship between your team and the community. Social activities are a chance for celebration and a time to come together.

### Faith Activities

A faith-based activity enhances the spiritual life of the local faith community and provides opportunity for spiritual development. Faith activities coordinated by the team encourage growth among adults and youth and bring together the community.

### Service Activities

A service activity unites members and non-members in achieving a goal toward a greater good. The purpose of service activities put on by the team is to go out and do something to support the parish and community.

### Communications

An excellent way to ensure the community is aware of the works the team is doing throughout the year is to spread the word about the team's impact in the community. Newsletters, mass emails, websites, and Facebook pages are excellent ways to share the team's story and get members of your faith community engaged and involved.

### Donations

There are many worthy causes to support financially. The team should consider where they would like to direct their funds throughout the year to both support its activities and make contributions. **Two** donations to any organization within your parish or externally of your choosing will count towards star status. **All** donations made by the group must be included in the Isidore activity tracker to balance the annual report.

## Summary of Team Director Position

The Team Director is the leader of the Catholic United Volunteer Team. Other members of the team will look to you for guidance and delegation. As Team Director the responsibility falls to you in calling the meetings, maintaining positive relationships with parish and school leadership, and appointing an auditor to review the financial statement annually. You are the main contact with your local member advisor.

### Expectations

- Know your mission: “Live our Catholic Faith; Serve our Catholic community; Support Catholic education.”
- Call and run a *minimum* of four meetings a year
  - Set the agenda
  - Invite parish/school leadership (follow up with them if they are unable to attend)
  - Invite local member advisor (follow up with them if they are unable to attend)
- Set goals for the year and work with the team to achieve them.
  - Fundraising totals
  - Increase in membership
  - Star Status
- Meet with parish/school leadership at least twice a year.
  - Assess parish/school needs and discuss how the Catholic United Volunteer Team can help.
  - Share goals and calendar of events; solicit parish/school support if needed.
  - Include Member Engagement Department staff if desired.
- Regular check-in with Catholic United Volunteer Team members
  - Keep projects moving
  - Work to resolve any issues relating to their position.
  - Recognition/evaluation of volunteer work
- Appoint an auditor (cannot be related to you or the administrative coordinator, must be a Catholic United member)
  - Share the annual financial statement for his/her review and signature.

### Meeting Requirements

To be considered an active team, you need to have at least 4 meetings per year. You may decide it necessary to have more than 4 to be sure to accomplish everything you set out to do. It is the duty of the Team Director to plan and call the meetings, however, this position does not necessarily need to lead every meeting.

The Volunteer Team must have at least 5 members present to constitute a quorum for the transaction of business. If there is not a quorum, financial actions may not be taken.

## Meeting Preparation

It is in the best interest of the team to do an annual planning meeting at the beginning of each year to schedule all team meetings and set goals for the upcoming year. Be flexible.

In preparation for each meeting, it is the responsibility of the Team Director to remind the team and to contact the local member advisor and parish leadership (priest, principal, director of religious education, etc.) to invite them to attend. Potential agenda items should be solicited at this time as well.

Contact the Administrative Coordinator to get a copy of the previous meeting's notes. Use this as a guide to track progress and help set the agenda for the upcoming meeting. See sample agenda below.

Send the agenda and previous meetings notes to the entire team at least one week in advance via email. This allows people to finish up any deliverables from the last meeting and to consider any proposals that will be presented at the upcoming meeting.

Making a meeting concise, productive, and positive doesn't happen on its own. Put in the work upfront; you'll thank yourself later.

## Goal Setting

Setting goals should be an important agenda item for your first Volunteer Meeting of each year. Goals should be achievable, measurable, and have lasting impact.

Examples: Reaching Platinum Star Status, increasing team visibility, or recruiting new members and leaders.

## Appointing an auditor

It is the responsibility of the Team Director to identify and appoint a member of Catholic United Financial as an auditor at the beginning of each calendar year. The home office should be notified via the team roster that is filled out and turned in before Feb. 15th of each year.

- Cannot be related to the Administrative Coordinator, Team Director, or any other signers.

## Managing the Catholic United Volunteer Team

The most important reason people across all generations volunteer with an organization is because it supports a cause they care about. To maintain an efficient, dedicated team, it is important to know your mission and promote it through your activities and interaction with parishioners and the community. Recruiting new volunteers and members is an important part of keeping the vitality of the group going.

## Summary of Administrative Coordinator Position

The Administrative Coordinator of the Catholic United Volunteer Team is responsible for managing team information. You will be working closely with the Member Engagement Department of Catholic United Financial to ensure that team activities and projects are reported correctly. The Catholic United Volunteer Team looks to you for understanding and knowledge of the guidelines of Member Engagement programs. **You will manage the checking and/or savings account for your team.** Other responsibilities include keeping notes of meetings and reporting to the Member Engagement Department when needed. You act as the primary contact for messaging and updates from the Member Engagement Department and it is your responsibility to share those messages with team members.

### Expectations

- Know your mission: “Live our Catholic Faith; Serve our Catholic community; Support Catholic education.”
- Maintain working knowledge of the Member Engagement programs offered through Catholic United Financial
  - Follow the guidelines as outlined for various programs.
  - Reach out to the Member Engagement Department for assistance or training as needed
- Manage checking/savings accounts.
  - Will assist the auditor annually.
- Submit documentation to the Member Engagement Department of Catholic United Financial
  - Utilize Isidore Online Activity Tracking System to submit activity alerts along with any necessary publicity prior to events (i.e. publicity pre- and post- event as provided by the Publicity Lead)
  - Utilize Isidore Online Activity Tracking System to confirm activities with information about volunteer hours, financial outcomes of events as required by program guidelines.
  - Complete and submit a balanced annual report through the Isidore system, detailing activities and any income/expenses associated with them.
- Maintain contact lists and membership lists for your team.

### Reporting Activity

To best serve your Catholic United Volunteer Team, we ask that Administrative Coordinators to submit all activities of the group to the Member Engagement Department in advance of the activity date. Our online activity tracking system (Isidore) is the primary tool for Administrative Coordinators regarding events and activities. Contact the Member Engagement Department with questions regarding online reporting, for access to the system, or for training as needed.

### Four Weeks Prior to an Event

Entering your upcoming activities prior to the activity date allows the Member Engagement Department to review your activity and contact you with any questions. Ensuring that your events are

entered ahead of time will also create clarity regarding which activities will count toward your star status for the year.

You will want to make sure you have requested information from your team members (flyers, bulletins, expected volunteers) to accurately enter into the tracking system.

### After an Event

Log in to Isidore to complete the “Post-Activity” detail section of your activity. This area will ask for income/expense and donations made that are associated with the activity, as well as attendance and volunteer information. Including this information is the final step in completing an activity.

For activities like Matching Grant and Member Assistance events, this information is necessary to calculate the matched amount provided by Catholic United. Not confirming an activity will result in a delay in depositing funds. Once the post-activity details have been entered, payments will be processed and directly deposited into the team checking account.

### Meeting Notes

As Administrative Coordinator, it is your responsibility to keep good notes from the Catholic United Volunteer Team meetings. This is especially important when there are decisions made on the appointment of team members and amounts/recipients of financial contributions and expenses.

The Team Director will rely on good meeting notes to help track the progress and assignments of Catholic United Volunteer Team Members. We recommend bringing a laptop to the meeting and emailing the meeting summary immediately following the conclusion of the meeting.

### Annual Report

Every year, all Catholic United Catholic United Volunteer Teams must submit an annual report, which is completed through the Isidore activity tracker. As the Administrative Coordinator, it is your duty to ensure that the information included on the report is accurate and that the information provided online matches your bank statements. **All financial transactions done through the bank account must be included in Isidore, for the report to balance.**

The Administrative Coordinator coordinates with the Auditor to review the information before submitting the annual report to the Member Engagement Department.

### Contact Management

What the Member Engagement Department does for you:

- The Member Engagement Programs Coordinator can provide a current listing of all Parish Team **members’ contact information** at your request. You can request to have this sorted and filtered in many ways (age, zip code, etc.). This can either be emailed back to you or printed and mailed via USPS.
- If you wish, we can also **print and send out mailing labels** for the specific list that you want. Request labels by emailing [Engage@catholicunited.org](mailto:Engage@catholicunited.org) with your Parish Team Name, City, and State and the parameters desired. Plan on two weeks to receive your labels.

## Summary of Publicity Lead Position

The Publicity Lead of the Catholic United Volunteer Team is responsible for developing or overseeing all event and team publicity. This includes flyers and posters, bulletin announcements, social media, and local press. You should be proficient using a computer and working with Microsoft Word, Canva, or some other comparable software. Other responsibilities include building relationships with parish and school contacts that oversee publicity. You will oversee sharing the Catholic United Financial story to a variety of audiences and should preferably be comfortable with public speaking.

### Expectations

- Know your mission: “Live our Catholic Faith; Serve our Catholic community; Support Catholic education.”
- Develop appropriate publicity materials for events and team activities.
  - This can include posters, flyers, bulletin announcements, etc.
  - Work with the Member Engagement Department to ensure that publicity guidelines are met (up-to-date Catholic United Financial logo use, appropriate language for matching funds, etc.)
- Submit finalized publicity for events and programs to the Administrative Coordinator for submission to the Member Engagement Department.
- Foster relationships with parish and school contacts in charge of publicity.
- Develop a newsletter (print and/or e-mail) for your Catholic United Volunteer Team.
  - Highlight Upcoming Events/Programs
  - Welcome New Members
  - Showcase successful events.
  - Thank Volunteers, Members, and Friends of Catholic United for their support of team activities.
- Take photos of your events and happenings
- Create relationships with local media (newspapers, radio stations, area church bulletins).
  - Encourage them to publicize announcements about your team activities before they happen to encourage community involvement and support of your events.
  - Follow up after your event to share your success and photos of your activities.

Publicity is an opportunity for your team to tell the story of how you help in your parish and your community. Let people know what you are doing and tell people what you’ve done.

Publicity is also more than just the message that you share with your parish community. Publicity, unlike event promotion, happens before, during, *and after* your activities and events.

Check out <https://www.catholicunitedfinancial.org/giving/resources/> for publicity resources.

## Activity Publicity Requirements

All forms of publicity (flyers, bulletins, websites, social media, newsletters, and newspapers, etc.) used to promote Catholic United Financial volunteer team events must include the full, up-to-date Catholic United logo and the local Member Advisor name and contact info. The cross emblem alone is not the full logo. Every volunteer team event submitted in Isidore must have at least one form of publicity adhering to the standards attached. Isidore submissions that do not include uploaded publicity will remain in “Incomplete Status” and will not be reviewed by Member Engagement.

Catholic United is the only acceptable shorthand for Catholic United Financial. Refrain from abbreviations such as “CUF” as this may be confused with other organizations with similar abbreviations.

In addition, certain programs also require specific language to appear on the publicity for that event:

- **Matching Grant and Member Assistance Programs:** “This event is eligible for a matching grant from Catholic United Financial of up to \$2000”
- **Grants4Good Program:** “This event is supported by a grant from Catholic United Financial”

**Program events that do not meet these publicity standards will not be granted star status and the grant amount will be adversely affected.**

### Logo Usage

The logo must be *at least* 1.5 inches long, maintain the proper aspect ratio, and contain the ® (registered trademark) symbol. Changing the logo to anything other than the original blue and gold, the black and white, or the all-white version is not acceptable. There should be enough blank space or “real estate” around the logo so as not to crowd the image and reduce visibility or readability of the logo. The logo should be clear and the edges clean, not jagged, or blurry.

Approved logos are available online at [www.catholicunitedfinancial.org/giving/resources](http://www.catholicunitedfinancial.org/giving/resources)



### Member Advisor Contact Information

Catholic United Financial is a fraternal benefit organization that gives back our proceeds to local Catholic communities through the efforts of our Catholic United Volunteer Teams. By including your local member advisors contact information on your publicity, you are helping us to grow membership and we in turn can better support PVT programming.

## Summary of Event Lead Position

The Event Lead of the Catholic United Volunteer Team is responsible for addressing all the logistical needs of Volunteer Team activities. You are given the flexibility of assigning other Catholic United members, or friends of Catholic United (non-members), specific responsibilities to achieve a successful event. The other members of the Catholic United Volunteer Team are looking to you to make sure that each event is professional, organized, and runs as smoothly as possible.

### Expectations

- Work with the rest of the team to assess all logistical needs for each Volunteer Team Event.
  - Volunteer and Publicity Needs
  - Set-up/Clean-up
  - Preparation Timeline
  - Think through all the details – parking, garbage, delivery of materials, etc.
  
- Work with vendors on supplying event materials and submit invoices to the Administrative Coordinator. Be sure to make sure vendors are paid on time.
  - Rent (parks, permits, contracts, etc.)
  - Liability Insurance (contact the Member Engagement Department if needed)
  - Catering
  - Decorations
  
- You or an appointed event team member are the first to arrive and last to leave events:
  - Space should be clean (or cleaner) than when you arrived
  - Lights off, doors locked
  - Troubleshooting during the event
  
- Event evaluation – record keeping for next year’s events

For more resources on event planning check out <https://www.catholicunitedfinancial.org/giving/resources/>

## Summary of Volunteer Lead Position

The Volunteer Lead of the Catholic United Volunteer Team is responsible for addressing all the volunteer needs of your team's activities. You are given the flexibility of assigning other Catholic United members, or friends of Catholic United (non-members), specific responsibilities to achieve a successful event. The other members of the Catholic United Volunteer Team are looking to you to make sure that each event is professional, organized, and runs as smoothly as possible. Other responsibilities include recognizing outstanding volunteers, welcoming new members to your team, and offering referrals to your local Member Advisor.

### Expectations

- Work with the rest of the team to assess all volunteer needs for each Volunteer Team Event.
  - Logistical and Publicity Needs
  - Involve/Assign as many people as possible
  
- Volunteer Recruitment
  - Volunteers working with you should have clear expectations on length of time and responsibilities needed.
  - Manage relationships with key parish/school staff as resources to access volunteers (youth group, school parents, seniors)

### Volunteer Contact Management

Volunteer acquisition and retention is vital to the health of the Catholic United Volunteer Team. Being an organized Volunteer Lead will ensure the Catholic United Catholic United Volunteer Team will continue serving your parish community well into the future.

It is important to remember that volunteers don't necessarily have to be members of Catholic United Financial. Consider the following list of volunteer pools:

- School Families
- Religious Education Families
- Catholic United Parish Team (list provided by the Member Engagement Department)
- Parish Youth Group
- Confirmation Candidates

Talk to your parish priest, school principal, or director of religious education to obtain a list of names and contact information.

### Using your Volunteer Contact List

This list will serve as your main database for staffing parish team events. It is important to be specific in the duties that need to be assigned, that you personally ask for their help, and that you thank them for their contribution. Highly involved volunteers may be candidates for team leadership. Non-members should be forwarded on to the local member advisor as referrals.