CAS Volunteer Chair Best Practices Manual 2025

1. Introduction

Volunteers and Volunteer Chairs are essential to the CAS, dedicating their time and energy to partnering with CAS staff to advance the organization's Strategic Plan.

Volunteer Chairs play an essential role in the Volunteer-Staff partnership, serving as subject matter experts and thought leaders, providing their actuarial insights and experience, and advising on the execution and progress of goals to move them forward in partnership with their Staff Chairs.

The CAS Volunteer Chairpersons manual was developed to provide guidance and best practices to the highly valued members who fulfill these leadership responsibilities. This manual covers key areas including:

- Volunteer Chairperson Transition
- Reporting Responsibilities
- Partnering with CAS Staff
- Staffing Your Working Group
- Managing Volunteers
- Goals and Deadlines

For simplicity, "working group" will be used throughout this document to collectively refer to committees, task forces, and working groups.

2. Volunteer Chairperson Transition

New CAS volunteer chairperson transitions may vary in approach. Some groups select a vice-chair a year in advance for training, while others rely on transition meetings for knowledge transfer. The CAS Staff Chair plays a critical role in ensuring a smooth and consistent transition.

Several resources are available to assist CAS working group chairs, including:

- The Vice President (VP) and Chief responsible for the working group
- The CAS Staff Chair

a. Elements Needed by New Chairperson

A new chairperson requires key information from the outgoing chair and CAS Staff Chair, such as:

- Working group's mission and objectives
- Recent accomplishments and ongoing initiatives
- Current goals, projects, statuses, and deadlines
- Past meeting agendas, minutes, and goals
- Expected member time commitments
- Member engagement levels and tenure
- Group procedures and available resources

b. The Transition Meeting

A meeting between the outgoing Volunteer chair, incoming Volunteer chair, and CAS Staff Chair ensures a smooth transition and prevents loss of momentum.

3. Reporting Responsibilities

a. Administrative Requirements

Working groups are typically required to:

- Develop annual goals
- Request substantive budget items, if applicable
- Maintain achievement summaries against goals

Volunteer Chairs may be asked to participate in Executive Council (EC) meetings as needed.

b. CAS Council Structure

The CAS Council Structure outlines the reporting relationships within the organization and facilitates collaboration across working groups. Each working group is assigned to a specific council, led by a CAS Vice President (VP) and staff Chief, to ensure alignment with CAS priorities and goals.

Chairs are expected to actively participate in meetings held by their VP and Chief for volunteer and staff chairs within the council. These meetings provide opportunities to:

- Share updates on group progress, challenges, and upcoming priorities.
- Collaborate with other working groups within the council to identify synergies, avoid duplication of efforts, and align timelines for shared initiatives.
- Receive guidance and feedback from the VP and Chief on aligning group activities with broader organizational goals.
- Discuss cross-functional initiatives or issues that require input and coordination from multiple working groups.
- Stay informed about updates from the CAS leadership and organizational changes that may impact their work.

Participation in council meetings helps Staff and Volunteer Chairs build stronger connections with their peers and fosters a sense of shared purpose. All Chairs are encouraged to actively engage in discussions, contribute insights, and seek opportunities to collaborate on projects that advance the CAS mission.

4. Partnering with CAS Staff

Building Relationships

The CAS Staff Chair is an essential partner to the volunteer chair. Regular communication — such as monthly check-ins — helps plan work, refine messaging, and strengthen collaboration.

Key Benefits of Partnering with Staff

CAS Staff provide:

- Historical knowledge of the group's work
- Alignment of group activities with CAS goals
- Access to association resources and trends
- Guidance on onboarding, goal-setting, and succession planning
- Experience and expertise across various areas of association management including volunteer management.

Outreach Templates

Templates are available for various communication needs, including outreach to new volunteers, thank-you notes, and a re-engagement letter for disengaged volunteers. Consult your CAS Staff Chair for assistance.

5. Staffing Your Working Group

a. Volunteer Recruitment

We now use the CAS Portal to recruit and manage volunteers through the Volunteering section of member profiles. The portal replaces the former Volunteer Interest and Participation (VIP) Survey and is designed to support a more streamlined, transparent, and year-round volunteer process.

Primary recruitment takes place each September as part of the CAS Fall Recruitment Campaign. During this time, Volunteer and Staff Chairs should review open roles and upcoming rotations, and work together to identify and recruit new members through the portal. Chairs receive updated reports of interested volunteers and are encouraged to plan ahead to ensure smooth transitions and to recognize volunteers rotating off.

Recruitment outside the fall cycle is possible, but must be coordinated in advance with your Staff Chair and the CAS Volunteer Engagement team to ensure alignment with broader volunteer engagement efforts.

In addition, the CAS Portal maintains a volunteer preferences list, which captures the areas and topics where members have expressed interest in volunteering. This list can be used to identify individuals whose preferences align with the needs of your working group.

Chairs should consider factors such as:

- **Background/Perspective:** Include volunteers that can bring a variety of backgrounds and perspectives to the group
- **Experience:** Balance seasoned experts and newer members
- **Willingness and Availability to Serve:** Prioritize committed volunteers who are able to meet the time requirements
- **Employment Type:** Value perspectives from different roles (e.g., regulators, consultants)
- **Skills:** Align specialized skills with group goals
- **Volunteer Terms:**
  - Chairs are generally appointed for one year, renewable up to three years.
  - Working Group member terms generally are one year, renewable up to three years.
  - Task Force members serve until the work is complete.

c. Staffing Deadlines

Incoming Volunteer Chairs should be ready to serve by mid-November following the CAS Annual Meeting. The CAS Staff Chair will update and maintain the roster in the CAS database.

6. Managing Volunteers

a. Engaging Volunteers

Engaging volunteers effectively is key to achieving the goals of the working group. Since volunteers are motivated by a variety of factors, a one-size-fits-all approach is rarely effective. Chairs should strive to understand the individual motivations and skill sets of their group members to foster meaningful participation.

Motivations for Volunteering

People volunteer for different reasons, such as:

- Expanding their social or professional network.
- Expressing their values or contributing to a cause important to them.
- Gaining skills, knowledge, or experience to enhance their career.
- Finding personal fulfillment and growth opportunities.

Chairs are encouraged to explore these motivations during onboarding conversations with new volunteers and during the group's annual kickoff meeting. Understanding why members chose to volunteer can help align their tasks with what they find rewarding and fulfilling.

Best Practices for Engagement

- **Assign Meaningful Work:** Ensure each volunteer has a clear, purposeful role that contributes to the group's objectives. Assign tasks that align with their skills and interests.
- **Communicate Regularly:** Provide updates, share progress, and celebrate milestones to keep everyone informed and engaged.
- **Offer Feedback and Recognition:** Acknowledge contributions through personal thank-yous, group recognition, or formal nominations for CAS awards like the New Members Award or the Above and Beyond Achievement Award.
- **Create Subgroups:** For large projects, form smaller teams or subgroups to give volunteers focused responsibilities and opportunities to collaborate more closely.

Onboarding and Kickoff Meetings

The onboarding process and the annual kickoff call are ideal times to set expectations, discuss goals, and foster a sense of community. Chairs should use these moments to:

- Introduce the group's mission, objectives, and upcoming projects.
- Encourage open communication and collaboration among members.
- Highlight how individual contributions will make an impact.

By tailoring engagement efforts to the unique needs and motivations of their group members, chairs can foster a positive and productive volunteer experience while advancing the group's goals.

b. Addressing Challenges

- **Personality Clashes:** Set up a meeting to discuss concerns privately and professionally.
- **Non-Contributors:** Discuss limitations and recommend stepping back if needed.
- **Time Constraints:** Adjust assignments based on availability.

c. Employ Inclusive Meeting Practices

Each volunteer brings a unique and valuable perspective to the group. Chairs should foster open and respectful discussion and encourage all volunteers to share their opinions, especially if they differ from others already stated. Offer multiple opportunities and modalities for volunteers to share their input (for example, verbally during meetings, in the meeting chat, and by email between meetings).

d. Identifying Future Leaders

Recognize high-potential volunteers and share their names with your Staff Chair and the CAS Leadership Development Working Group for future opportunities.

7. Goals and Deadlines (Project Management)

Effective project management is crucial to the success of any CAS working group. The chairperson plays a central role in setting and achieving goals while ensuring alignment with CAS priorities.

a. Goal Setting

At the start of the volunteer cycle (November), chairs should work with their CAS Staff Chair and Vice President (VP) to establish goals. These goals may include:

- Organizational Goals: Broad objectives that align with CAS's strategic priorities.
- CEO Goals: Specific initiatives that contribute to the CAS leadership's annual focus areas.
- Working Group-Specific Goals: Tasks or projects tied to the group's mission (e.g., completing reports, organizing events, developing resources).

Volunteer and Staff Chairs should ensure goals are:

- Specific: Clearly defined with a measurable outcome.
- Achievable: Realistic and appropriate given the group's capacity.
- Time-Bound: Linked to deadlines for completion to ensure accountability.

b. Developing a Project Plan

To meet established goals, the Volunteer chairperson should collaborate with their CAS Staff Chair to create a detailed project plan or roadmap. A well-structured plan includes:

- Major Milestones: Key phases or deliverables broken down into actionable steps.
- Timelines: Specific deadlines for each milestone to track progress.
- Assigned Responsibilities: Volunteers should be assigned tasks that align with their skills, interests, and availability.

Tools like shared calendars, project management spreadsheets or simple checklists can help organize and monitor progress effectively.

c. Communicating Goals

It is essential for chairs to communicate the group's goals to all members during:

- The Annual Kickoff Call: Introduce goals, priorities, and timelines.
- Regular Check-Ins: Use group meetings or individual touchpoints to review progress and address roadblocks.

Transparency in communication fosters engagement, keeps everyone aligned, and provides opportunities to clarify expectations.

d. Monitoring Progress

Chairs should regularly assess progress toward goals with the following best practices:

- Review status updates during monthly meetings.
- Identify areas requiring additional resources or adjustments.
- Address obstacles promptly, with input from the CAS Staff Chair or VP as needed.
- Celebrate milestones to keep volunteers motivated and reinforce their contributions.

e. Holding Volunteers Accountable

Accountability ensures the group stays on track. Chairs can:

- Clearly define individual roles and expectations upfront.
- Provide constructive feedback when deliverables are delayed or incomplete.
- Adjust workloads if volunteers experience unexpected time constraints.

f. Reporting Achievements

Documenting and sharing accomplishments is a critical component of meeting deadlines. Chairs should work with their CAS Staff Chair to:

- Provide regular updates to CAS leadership as needed.
- Summarize progress, challenges, and results in annual reports.
- Highlight the group's impact within the broader CAS goals.

By setting clear expectations, maintaining strong communication, and monitoring progress effectively, chairs can drive their working groups to success while ensuring timely completion of all objectives.

8. Available Resources

a. CAS Strategic Plan

Chairs should understand how their group's work supports the CAS's strategic goals.