

 <p>Citizens' Climate Lobby</p>	<p><u>Standard Operating Procedure</u> (SOP)</p> <p>CCL Texas</p> <p>SOP #001</p> <p>Effective Date: 05/07/2020</p> <p>Last Revised: 07/01/2021</p>
<p>CCL Texas Welcome Team</p>	

I. Scope of this document

This manual outlines the purpose, infrastructure requirements, roles, responsibilities, and procedures of the Citizens' Climate Lobby (CCL) Texas State Welcome Team.

II. Welcome Team Purpose

The purpose of the Welcome Team is to facilitate the rapid transition of new volunteer prospects to being a [well-oriented CCL supporter](#) or an [Occasionally Active Volunteer](#) and above

III. Infrastructure Requirements

- Using [Slack](#) - Centralized Communication platform. I.E [Slack](#), [Teams](#), [Discord](#), [Mattermost](#), etc
- Using [Asana](#) - Progress tracking app. I.E CCL Roster, [Asana](#), [Trello](#), [Excel](#), [Google Sheets](#), etc

IV. Welcome Team Roles & Responsibilities

The below table summarizes the responsibilities of the indicated Welcome Team roles.

Role Name	Responsibilities
Welcome Team Lead	<ul style="list-style-type: none"> • Identifies problems and areas for process improvement, and creates solutions with the State Chapter Development and Organization Coordinator • Provides initial training and ongoing training to new Welcome Team members to existing team members where not covered by a Welcome Team Champion • Schedules training sessions as appropriate • Fills in as either a Welcome Team Allocator or Welcome Team Champion as necessary • Runs regularly scheduled Welcome Team support calls • Updates Documentation as necessary

Welcome Team Champion	<ul style="list-style-type: none"> • Acts as a Welcome Team Lead at a defined grouping of one or more chapters • Works with Welcome Team Lead to identify ways to improve the Welcome Team at a local spot within the capacity of the program's capabilities
Welcome Volunteer - Allocator (WVA)	<ul style="list-style-type: none"> • Using the Detailed Onboarding Process section, follow steps 1-2 • Updates Asana as needed • Joins regularly scheduled Welcome Team support calls
Welcome Volunteer - Onboarder (WVO)	<ul style="list-style-type: none"> • Using the Detailed Onboarding Process section, follow steps 3-5 • Updates Asana as needed • Serves as the general Point of Contact (POC) for a New Prospect until they have reached an Advised Status in Asana • Explicitly Encourages New Prospects to do the following, at least twice <ul style="list-style-type: none"> ○ Create complete CCL Community profile ○ Take Climate Advocate Training ○ Sign up for Monthly Calling Campaign ○ Sign up for CCL texts ○ Attend CCL National Core Volunteer Training ○ Join Slack where applicable and create complete profile ○ Attend the chapter meeting. A WV should try to follow up with the NP after the meeting to create action items. • Invites their assigned New Prospects to chapter meetings, happy hours, and other relevant events. • Joins regularly scheduled Welcome Team support calls

V. Onboarding Procedure

A. High Level Onboarding Overview

1. A New Prospect signs up on CCL Community, is added to the Roster, and is moved automatically into their nearest chapter based on ZIP code.
2. The Welcome Volunteer Allocator reaches out to the New Prospect, and if the New Prospect responds, the Welcome Volunteer Allocator assigns the New Prospect to a Welcome Volunteer Onboarder.
3. The Welcome Volunteer educates and engages the New Prospect regarding activities occurring within the chapter with the goal of encouraging New Prospects to find some habit of participation or determine if it would be better to re-engage later.

B. Onboard Tracking

We track the status of New Prospects throughout the onboarding process using the CCL Roster and Asana. Each of these statuses should be updated in Asana as they happen

Status	Description
0 - A new Prospect is added to the roster	A New Prospect has joined CCL Community
1- 1st attempt	The Welcome Allocator has sent the New Prospect a text or email
2 - 2nd attempt	A second attempt has been made to contact the New Prospect
3 - Third attempt welcome message - No Response	A third attempt has been made to contact the New Prospect
4- Welcome message replied - Wants WV	The Welcome Volunteer Allocator has received a reply from the New Volunteer.
5 - NP hand off and WV scheduling Intro meeting	Scheduling the intro meeting should be the next thing down after the allocator hands the NP off
6 - Intro Meeting Scheduled	The Welcome Volunteer Onboarder has scheduled the introductory meeting with the New Prospect.
7 - Intro Meeting Complete	The Welcome Volunteer Onboarder has had an Intro Meeting with the New Volunteer and has sent them a recap email
8 - Advised	The Welcome Volunteer Onboarder has given the New Volunteer specific team recommendations

BC - Bad Contact information	Contact information is not up to date
NI - Not Interested	Stop attempting to contact this person, and do not try again. Welcome Volunteer - Allocator shall contact membership@citizensclimate.org to have the contact removed from the roster.
NR - No Response	After three attempts, there has still been no response from the New Member. The Welcome Volunteer Allocator shall mark the New Prospect as Not Active in the Roster, and leave the standard note for No Response in the Roster.
RL - Re-engage later	It was determined that during the onboarding process that further engagement later would be best. We will attempt to re-engage in the future. Welcome Volunteer will place the New Prospect into the Re-Engage later section in Asana

C. Detailed Onboarding Process

The goal of the New Prospect onboarding process is to welcome the prospect, moving them through the process as organically and efficiently as possible for both the New Prospect and all Welcome Team Members.

1. Send Welcome Message(s) to New Prospect on Roster (1st, 2nd, 3rd attempts)

The Welcome Volunteer Allocator is the person who will send a welcome message to the New Prospect. The Welcome Volunteer Allocator [uses the State Roster to find New Prospects to send a welcome message](#) to, following [these](#) examples as templates for what to send as a message, and [updates Asana](#) appropriately. If the New Prospect responds and wants a Welcome Volunteer Onboarder they will send the [Welcome Form](#).

The Welcome Volunteer Allocator sends a welcome message up to three times to each individual. Once by text, email, and phone call, preferably in that order. These contact attempts generally happen in three chunks throughout the week. For example, reaching out to a group of new members on Monday for the first attempt, reaching out to the newest group on Friday while reaching out to the first group for the second time. Then, on Monday again, reaching out to the newest group while giving a final attempt from the last week. Although some Welcome Allocators may choose to reach out to New Prospects daily, as they come in!

To respect communications preferences, we email instead of sending a text or call if the New Prospect has not opted to receive text messages from CCL. No further attempts will be made to contact the New Prospect by the Welcome Volunteer Allocator. The progression should be tracked in [Asana](#).

If, during your communication with the New Prospect, before they get handed off to a Welcome Volunteer Onboarder, the New Prospect says anything that wouldn't be captured in the welcome form, be sure to make a comment in Asana under their task.

Note: If the New Prospect indicates at any point that he or she is no longer interested in proceeding with CCL or if the New Prospect fails to respond after three contact attempts on separate days, either the WVA or WVO (whoever is currently assigned to them) will make the call to do one of the following (a) mark the New Prospect as Re-engage later in the roster and leave a note about when to re-engage as well as put a date on "due date" for the New Prospect, or (b) email membership@citizensclimatelobby.org to ask them to remove the New Prospect from the roster.

2. New Prospect to Welcome Volunteer Onboarder Handoff

The Welcome Volunteer Allocator, after a New Prospect has responded and indicated their interest in learning more about CCL to the Allocator, will post in the appropriate Slack channel, to which Welcome Volunteer Onboarder would like to take on this New Prospect. During this time, the Welcome Volunteer Allocator should place the New Prospect into the "Wants WV" status on Asana. Then, once a Welcome Volunteer Onboarder accepts the New Prospect, the Welcome Volunteer Onboarder will introduce the New Prospect to the Welcome Volunteer Onboarder however is most convenient for all parties, generally email. The Welcome Volunteer Allocator will then assign the Welcome Volunteer Onboarder to the person in Asana.

3. Welcome Volunteer Onboarder Introductory Meeting

The Welcome Volunteer prepares for a meeting or phone call with the New Prospect. The Welcome Volunteer should lead the conversation with the New Prospect to generally follow this outline:

- Introductions. The Welcome Volunteer should go first by introducing themselves, what motivated them to join CCL, and their activities in CCL. The Welcome Volunteer should then ask the same of the New Prospect.
- Use the [NP Welcome Presentation](#) as a guide to help the New Prospect's understanding of CCL's values, mission, and approach to advocacy. Encourage the New Prospect to interrupt as needed or ask the Welcome Volunteer to slow down. It is good to stop at each section and make sure the New Prospect understands what was reviewed.
- If applicable use the [Welcome Form](#) to guide further discussions

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- If time permits, ask the New Prospect if they would like to review local, state, and national CCL teams and initiatives that may interest them. If these teams or initiatives are discussed, ask if they would like to be introduced to the appropriate point of contact.
 - Provide the dates of the next local chapter meeting, happy hour, or other CCL event and highly encourage them to attend.
 - *Always* finish the meeting with an action list that includes what they should do next, such as register on CCL Community, sign up for the Monthly Calling Campaign, or contact recommended team leads. Provide suggestions on what to say if they contact team leads such as their name, the team they are interested in, and who referred them (you).
 - Consider scheduling a follow-up call, but make sure not to set expectations for things they should complete by the next meeting

4. Send Post-Introductory Meeting Recap Email

Within 24 hours of the Introductory Meeting, the Welcome Volunteer sends a recap email to the New Prospect similar to the example titled “Email Recap/Follow up” located in the “Drive Resources” folder under “Email and Text Messaging Templates” on Google Drive.

If specific teams are recommended to the New Prospect during the Introductory Meeting, be sure to include in the recap email the contact information for those teams.

5. Report Status of New Prospect’s Onboarding In Asana

The Welcome Volunteer must report it in the Asana when the New Prospect has reached onboarded status. At this point, the now Actively Involved Member is no longer the direct responsibility of the Welcome Team.

VI. Definitions

Active Member

A CCL member who is contributing at least monthly to at least one team or attempting most/all basic actions by CCL at whatever level the chapter is enforcing it. E.G action items created by the chapter or the action sheet that lists actions created directly by CCL National

Active Welcome Volunteer

A Welcome Volunteer that has been meeting expectations by attending at least two check in meetings and trainings happening in the quarter

Asana

[“The easiest way to manage team, projects, and tasks”](#)

CCL Core Values

[Focus, Optimism, Relationships, Integrity, Personal Power, Being Nonpartisan, Diversity](#)

Climate Advocate Training (CAT)

[CCL National’s official orientation for new volunteers.](#)

Monthly Calling Campaign

[CCL National’s official calling tool for volunteers to make their calls to congress easier](#)

CCL Texts

[CCL National’s official texting tool that keeps volunteers in the know about the most important announcements](#)

CCL supporter

A CCL supporter is someone who supports the ideas of CCL and may stay up to date on the current ongoing of CCL, even to a very minimal level, but does not volunteer in any way.

NP Welcome Presentation

A Presentation shared and reviewed with a New Prospect that includes the following information.

- The mission and values of CCL
- Information regarding the Energy Innovation and Carbon Dividend Act
- The national and local structure of CCL
- Information regarding the five levers of political will
- Chapter accomplishments
- Organization-wide programs

New Prospect

A contact on the Roster who has not yet been advised in any way.

Not Interested Status

A status in Asana used to designate members who inform the Welcome Volunteer Team that they are not interested in receiving updates and no longer want to be engaged.

Occasionally Active Volunteer

A CCL volunteer who is interested in occasionally participating in CCL activities but does not have the time or desire to be an [Active Member](#). They are someone who makes a call to congress every now and again, may attend a chapter meeting once a quarter, etc

Point of Contact (POC)

A person who maintains a relationship with another entity, e.g. a person or organization. In this SOP, a Welcome Volunteer serves as the point of contact for their assigned New Prospect.

Re-engage Later Status

A status in Asana used to designate members who are too busy to currently make routine contributions to the organization, but show general interest. Attempts are made to re-engage every 2 to 4 months depending on resources available.

Roster

The Salesforce-backed database of contact information for CCL New Prospects, supporters, and volunteers that is maintained by CCL National and provided to chapters to track contact information

Slack

[“Slack is a messaging app for business that connects people to the information they need. By bringing people together to work as one unified team, Slack transforms the way organizations communicate.”](#)

Standard Operating Procedure (SOP)

A set of step-by-step instructions compiled by an organization to help workers carry out complex routine operations.

Texas Mission Statement

To empower citizens of all backgrounds to leverage the democratic process and nonpartisan grassroots advocacy to support the most effective climate legislation available at every level of government, as guided by Citizens' Climate Lobby's Core Values.

Very Active Volunteer

A volunteer who has an official CCL leadership role such as a Team Lead, Coordinator, Group Lead, or other official leadership role.

Welcome Form

A form completed by New Prospects that helps Welcome Volunteers and chapter members determine the basic knowledge level of the New Prospect and make recommendations for chapter involvement.

Click [here](#) to see the form

Welcome Team

The team that facilitates the transition of a New Prospect from their initial sign-up to being Actively Involved Members.

Well Oriented

A phrase used to describe knowledge of the below facts and concepts:

- Our [Mission statement](#) and some of our [CCL Values](#)
- [Levers of Political Will](#) and how they're applied at a high level
- The main current legislation CCL supports and outline of how it works
- CCL local, metro, state, and national structure
- [Some past accomplishments of CCL](#)
- Important programs, platforms, and tools
 - [CCL Community](#)
 - [Climate Advocate Training](#)
 - [Monthly Calling Campaign](#), other tools to [write](#) and [call](#) Congress, and how they relate
 - CCL [text alerts](#)
 - [Slack](#) (where applicable)
 - [Core Volunteer Training](#)
 - [Citizens' Climate University](#)
 - Local, state, and national CCL social media accounts (where applicable)
- Understanding of how to be an effective citizen lobbyist

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- [Know the district where they reside](#)
 - High level knowledge of how a bill becomes a law

Appendix A: Using the State Roster to find New Prospects to send Welcome Message to

Using the [State Roster](#), go to the “New Members” Tab. Once there, use the “CCL Chapter” filter to drill down to the relevant chapters you’re reaching out to. Note, you can only choose one chapter at a time.

Their phone number and email should be available on this tab.

Appendix B: Welcome Allocator Communication Templates

Initial Communication - Via Email

Hi there! Is this **[THEIR NAME]**?

My name is **[YOUR NAME]**, and I’m a welcome volunteer with Citizens’ Climate Lobby. Thanks for signing up! Do you have ~30 to talk on the phone this week or the next? The call would give you a brief overview of our organization and begin the start of finding a role for you.

If you’re interested in taking focused action on climate change, we’d love to have you join our local chapter! Let me know if you have any questions.

Thank you, and I hope to hear back soon!

First Non-response follow-up - Via Text

Hi just reaching out again wondering if you might have some time this week to schedule an introduction call. Just let me know your availability, and we’ll get you connected with one of our Welcome Volunteers for a one-on-one orientation. Thanks!

Second Non-response follow-up - Via Call

Hey **[Their Name]**, it’s **[Your Name]** from Citizens’ Climate Lobby. I wanted to make one final attempt to reach out to schedule your welcome call. If I don’t hear back, no problem! We may reach out again in a few months if we don’t hear from you first. If you have decided you are not interested in being

contacted personally, please let me know so that I can update our records. Thank you, and have a great day!

Hand-off to welcome volunteer

Hello [First name of NP],

I am introducing [WV first and last name], Welcome Volunteer [and other CCL titles if applicable, e.g. “and Grasstops Coordinator with CCL Dallas”] who will reach out to you shortly to introduce you to CCL, connect you with volunteer opportunities, answer any questions about our policy or advocacy methods, and give you next steps toward getting involved.

Have a wonderful day!

Appendix C: Asana

One of the best things to do is to watch this [video](#) created by Asana to give a basic overview of the application.

Adding New Prospects from Communities Roster Export

With the State Roster open, after reaching out to a New Prospect, do the following

1. Go to the appropriate Asana Welcome Pod
2. Mouse over “Making Contact Attempts”, click the “+” that appears
3. Under “Task template” select “New Prospect”
4. Click into the Task and change the task name to the New Prospect
5. Going back into the state roster, highlight the entire row of the New Prospect that was reached out to and copy it
6. Go back to the new generated Asana task
7. Paste in the information copied from step one into the description of the New Prospect task found in step two
8. **Copy the email address from the there and paste it into the “email” column**

Tracking Status Progression

Note: there are many ways to update the status of a New Prospect, if there is a way that works better for you, please just mention it to the Welcome Team Lead or Champion and feel free to keep doing it that way! This is just one example.

1. Click on individual task or click and drag to select many tasks
2. Under the “Status column” click the drop down on one of the selected task(s)

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3. Update the status to be correct

Appendix D: Slack Requirements

The following are actions that grant eligibility:

- Climate Advocate Training
- Sign up and make a call on the Monthly Calling Campaign
- Taking a shift and attend a tabling event
- Write a letter to the editor
- Attend an event organized at the National or Regional level- such as the conference