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Skilled Volunteer Engagement

Case Study Analysis

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Summary

With the launch of GoVolunteer Probono* as a pilot program, Vantage Point is addressing the changing paradigm of volunteerism head-on. Traditional envelope-stuffing, database entry-type volunteers are harder and harder to find. Younger generations of volunteers are more interested in the payback of their volunteer roles than simply the altruistic philosophy of volunteering. GoVolunteer Probono is a program based on the idea that volunteers have incredible skills to offer the voluntary sector that are not adequately acknowledged or engaged.

Vantage Point determined it was important to study examples of engaging specifically skilled volunteers in the not-for-profit sector to better understand how this method of volunteer engagement can be successful. It is also important to understand the common pitfalls. The results were clear: when organizations engage specifically skilled volunteers, the outcome can be phenomenal.

The analysis yielded many key learnings that will be used to influence the development of the GoVolunteer Probono program. This report shares these key learnings below, in the hopes that other organizations looking at the benefits of specifically skilled volunteering can also learn from this study.

The five prevalent lessons learned for engaging specifically skilled volunteers are to:

1. Clearly define the roles for all participants;
2. Ensure the project is a priority for all participants, including the organization;
3. Gain buy-in from the entire organization, preferably starting from the top down;
4. Emphasize the competitive advantage of accessing more than their own skill set; and
5. Emphasize the business-related learning possible from volunteering.

This report considers these discoveries in more detail below. Other learnings also worth mentioning are (1) the importance of gaining an outside, fresh perspective on an organization's business processes; (2) the need for flexibility as the project unfolds and an organization encounters unexpected hurdles and time delays; and (3) the importance of creating a shared language to bridge the communication gap between the organization and its particular operations and the volunteer and his/her particular skills.

Hopefully, the voluntary sector can apply these lessons to promote strategic and mindful volunteerism in communities throughout North America. In British Columbia, Vantage Point will apply this analysis to continue to inspire and build leadership in the voluntary sector.

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Background

Vantage Point launched GoVolunteer Probono as a Pilot Program in August 2006. The program develops the volunteer sector by connecting specifically skilled volunteers with not-for-profit organizations (NFPs) for short-term, clearly defined projects (2-6 months). The specifically skilled volunteers fill gaps in expertise and/or time within the NFP organization's work plan. Vantage Point created the pilot program based on extensive research and anecdotal evidence of engaging specifically skilled volunteers in the voluntary sector workforce.

Vantage Point believes that the specifically skilled volunteer can engage with a voluntary sector organization at a management level and be directly accountable to the Executive Director. The volunteer thus becomes another *human resource* that happens to be unpaid. As a human resource of the organization, management can integrate the volunteer into the staff and strategic planning process, rather than relegate the individual to the periphery of the organization, as is often the case with traditional volunteer management programs.

Objective

The purpose of this report is to:

- Capture the experiences of organizations that engage specifically skilled volunteers;
- Assess NFP organizations' level of success engaging skilled volunteers;
- Assess volunteers' level of satisfaction with skilled volunteering experiences;
- Determine if goals for NFP organizations and volunteers were set and realized;
- Determine if current pilot program goals (see below) seem viable given the reported evidence;
- Collect recommendations on ways to implement an ongoing program; and
- Identify key successes and opportunities of past experiences.

Current GoVolunteer Probono Pilot Goals for NFP organizations:

- Increased ability to deliver on mission by addressing issues and ideas formerly on wish lists or otherwise not resourced;
- Integration of specifically skilled volunteers into strategic planning;
- Assimilation of specifically skilled volunteers into human resources plan and
- Familiarity with Integrated Human Resources concepts (using a People Lens©) and greater ability to adopt it as an ongoing practice.

Current GoVolunteer Probono Pilot Goals for Volunteers:

- Engagement in the community;
- Volunteering opportunities limited to a specific time period; and
- A method to engage their specific skills in a volunteering role.

Methodology

Vantage Point sought participants who were involved in projects engaging specifically skilled volunteers. The GoVolunteer Probono Research Analyst (a specifically skilled volunteer) produced two survey tools with which to sample the experience of the volunteer and the NFP manager. The analyst sent participants the survey before the in-person or telephone meeting to allow for thoughtful responses. Vantage Point analyzed responses for commonalities across the projects.

Thanks

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– Virginia Edelstein, Vantage Point Program Director

Key Learnings

The following are conclusions crafted from all studied experiences, listed in the order of frequency the concepts were identified by the participants. These conclusions can be used as informational items and indicators while creating, piloting and revising the GoVolunteer Probono program at Vantage Point.

**Please note - All respondents supported the initiative to involve specifically skilled volunteers in NFP organizations and were eager to engage in future projects themselves.*

1. Clearly define the roles for all participants

This concept was the most frequently referenced success or weakness of the volunteer projects analyzed. Defining the roles includes an emphasis on the NFP organization as much as the volunteer. These projects are two-way relationships in which both parties benefit and both parties work. Roles in projects involving specifically skilled volunteers can be defined by answering several key questions, including “Who is involved and in what capacity?” and “What are the deliverables and who is responsible for them?”

Projects can be built in “bite-size” pieces so they are more palatable to the volunteer and the organization. Expectations must be clearly set and then managed as the project proceeds. Sometimes setting up regular check-in meetings is a good way to keep a project on track. Several participants stated the majority of their time was spent in the planning stages, defining the roles and responsibilities. Without up-front consensus, no real success could follow.

2. Ensure the project is a priority for all participants, including the organization

If the project is not a priority for all of the participants, then the commitment to the project may wane. Alternatively, if a volunteer is sought during a crisis, when the project is of huge priority, the opportunity to define the roles and tangible deliverables may not be available.

A common misperception is that the volunteer will do all of the work. Most of the participants realized before the project’s start, or learned very quickly, that both sides of the table had to work hard to make the project a success. Sometimes the work was merely in making information sharing a priority, which includes creating clear lines of communication on the project. Sometimes the work involved many internal resource hours to support the volunteer’s efforts. Either way, the common phrase “a volunteer isn’t free” certainly came to life in these examples, although not with negative connotations. The time and work put into these volunteer projects was almost unanimously deemed “well worth it”. In all cases, the organization *and* the volunteer had to prioritize the project and put in almost equal amounts of time to yield a successful outcome.

3. Gain buy-in from the entire organization, preferably starting from the top down

The NFP staff must be prepared to support and appreciate the work of the volunteer(s), otherwise the success of the project may be compromised and a valuable resource lost. Projects with the open support of the top executive saw the greatest successes and buy-in from other staff and volunteers. Projects that did not have staff buy-in saw the greatest obstacles.

The volunteers in these skilled positions are part of the organization's team. That naturally means the project team on which they are specifically working, but it also means part of the organization's overall team. If the volunteer is not valued as such, then the staff can impede his/her progress and/or the volunteer may leave the project feeling unsatisfied, unappreciated or much worse, angry. Until the entire organization and its existing volunteers (including board members) understand why the specifically skilled volunteer is being engaged and agree with the reasoning, projects on which that volunteer works are at risk of major failure and ill-will.

4. Emphasize the competitive advantage of accessing more than their own skill set

Several projects engaged volunteers who eventually brought other volunteers to the table in order to benefit the overall project. These volunteers and their networks created even more value added than the volunteer did as an individual.

Organizations often acknowledge their constituents' networks as a resource for funding opportunities, but volunteering opportunities are equally valuable. After the NFP organizations engaged the "original" volunteers; project management, systems analysis and report-building were just some examples of the skills brought to projects by other "networked" volunteers. Organizations can consider the networks of their existing volunteers when hurdles within a project are reached – perhaps a new skill set is needed to move forward and perhaps that skill set works in the cubicle next to the existing volunteer.

On the other hand, one volunteer gained entry into a new community through his volunteer role. The network of the organization was another benefit, or non-monetary payment, the organization had to offer him as an incentive to working gratis on the project. Organizations have much to offer their human resources other than money, and that includes paid staff and unpaid volunteers. The entire sector would do well to capitalize on the benefits it can offer, without worrying about those (often financial) it cannot.

5. Emphasize the business-related learning possible from volunteering

When asked about their volunteering experience, several of the volunteers acknowledged they gained important skills related to their day-to-day professional lives through the projects. From networks to drive business and get job interviews to better understanding of how their craft could be applied and sold in new and interesting ways, these volunteers enhanced their careers through these projects.

Organizations would do well to understand this potential benefit of engaging specifically skilled volunteers. Based on this learning, organizations could create volunteer positions that can allow such learning for the volunteers and advertise the potential learning as an added incentive to volunteer.

Companies would do well to understand this benefit for their employees. Leadership expertise, real-life implementation of skills before working with paying clients and greater teamwork capabilities are invaluable to an organization and can be hard skills to teach. Perhaps volunteering is an excellent way in which to develop internal staff.

Appendix 1: Project Summaries

1. A Loving Spoonful

Staff Lead:	Sue Moen, <i>Executive Director</i>
Volunteer:	Peter Wachowich, <i>Graphic Agents Art Director</i>
Volunteer Role:	Marketing campaign creation and management
Key Success:	The Executive Director encouraged the volunteer to manage himself and “let go” of the project to truly empower him.
Key Learning:	If project planning is important in the professional management of a project, it is just as important in the volunteer management of a similar project.

Overview: A Loving Spoonful (ALS) engages many volunteers at a variety of levels. From front line volunteers that deliver client meals to a sophisticated system of community advisory groups responsible for setting strategy and executing projects, specifically skilled volunteers at ALS seem to be a dime a dozen. One way in which the organization regularly engages volunteers is through recurring roles. The marketing designer for its annual campaign is such a position. They recruited Peter Wachowich to help fill a volunteer position that others had filled in years past.

Peter’s primary role was to translate the marketing brief for ALS’s annual campaign into a graphic representation of the organization’s message. He also took on the production aspects of printing all materials. Peter found the experience very beneficial. The role was a complement to other volunteer roles he already held throughout the community and with ALS.

This role, however, took advantage of his very specific design skill set, and truly let him use his craft to make an organization he believed in even better. Because of Sue’s methods and past experience with skilled volunteers, Peter found the specific position description, deliverables and project timelines very helpful in creating a successful experience. Peter also found that despite everyone’s best planning and project management efforts, timing and stopping and starting work while waiting on various constituents’ input could be difficult if the he wasn’t flexible about the process.

Sue had worked with volunteers in this position before, and with Peter decided to give him even more responsibility than his predecessors. Peter was given charge of print production, too. Though Sue was giving her new volunteer more responsibility and she was very versed in working with specifically skilled and traditional volunteers, even she was amazed at how little management Peter required. She gave him the project parameters, ensured he had access to information, and “let go” of her authority. She empowered him to do what he did best. And he did just that.

The campaign Peter worked on was ALS’s most successful campaign to date. Professionally, Peter was proud to be part of such an achievement and had something different and very tangible to add to his resume. As a volunteer, Peter really enjoyed contributing his skills to an organization where he already volunteered in a more traditional way. Sue found yet again that when she allowed a volunteer the freedom to succeed, he absolutely did. As a continuing sales pitch for her board, her

donors and her staff, Peter was an example of what can be done when engaging volunteers' skills well.

2. Arts Umbrella

Staff Lead:	Lucille Pacey, <i>Executive Director</i> Scott Elliott, <i>Development Director</i>
Volunteer:	Troy Anderson, <i>Business Objects</i> Summer Recchi, <i>Business Objects, Solutions Coach</i>
Volunteer Role:	Developed reporting vehicle and scientifically-based donor analysis to better predict fundraising campaign successes and opportunities.
Key Success:	Engaging volunteers that were part of the business community gave access to a network of other skill sets that enhanced the project's success.
Key Learning:	Although defining the project and role and responsibilities is very important, both the organization and volunteer must also realize that a certain level of flexibility is required.

Overview: A fundraising volunteer at Arts Umbrella wondered how the organization's already sophisticated development efforts could be more efficiently executed and communicated to participating constituents. Based on the question, Arts Umbrella staff and the volunteer brainstormed about ways in which the volunteer's employer, Business Objects, could share some of its employee and product expertise to increase the effectiveness of the Arts Umbrella development team.

The volunteer and Scott Elliott enlisted the help of Troy Anderson to more fully develop ideas about ways in which Arts Umbrella's donor data could be mined to yield more information. Troy was the "idea man" behind the eventual solution: to create a sales funnel report using Business Objects' product, Crystal Reports, that would help predict each donor's probability of giving to the annual campaign. Troy then contacted Summer Recchi at Business Objects to lead the idea through its execution stage.

Both Troy and Summer felt their volunteer experience was very rewarding, because it allowed them to give back to the community using their particular expertise. They felt the staff at Arts Umbrella appreciated and understood them as volunteers. Being part of the greater team was important, rather than serving as interlopers to the organization in general and the project, specifically.

Arts Umbrella was also pleased with the results, particularly the indirect benefits of creating such a powerful predictive tool. Not only was information more easily gathered and communicated, but the scientific fundamentals behind the program lent new credibility to the Arts Umbrella annual campaign for its volunteer fundraisers and donors. Confidence of fundraisers increased, which in turn increased their ability to successfully fundraise on behalf of Arts Umbrella's important programs.

Much of Arts Umbrella's successful experience they credit to their due diligence in understanding the unique skill set of each volunteer involved in the project. Both parties spent a great deal of time on understanding each other, creating shared language and planning the project. Arts Umbrella felt

that without the up-front work and commitment of the entire team, it would not have been possible to reach the successful conclusion of the project.

3. Canadian Red Cross – BC Lower Mainland Region

Staff Lead:	Susan Borthwick, <i>Regional Director</i>
Volunteer:	Colleen Kelly, <i>Vantage Point Executive Director</i>
Volunteer Role:	Disaster Volunteer Recruitment and Training Consultant
Key Success:	Experience gave volunteer the opportunity to learn about the mission and passion of the overall organization, thus creating a “raving fan.”
Key Learning:	Clear accountability for the volunteer was not in place and created a work environment in which the volunteer found it difficult to operate and even more difficult to achieve results.

Overview: Red Cross contacted Colleen in January 2006 during the Asia Tsunami disaster response. The Red Cross had yet to encounter such an overwhelming international response to a crisis. Senior, skilled resources were required for officer roles (leadership roles that reported to Job Directors within the Red Cross) within the Emergency Response Team (ERT) and to relieve the overworked staff and existing volunteers.

Red Cross was not equipped to integrate and engage new volunteers in these ways. While the Red Cross was experienced at engaging traditional volunteers, its ERT was not prepared to engage the skill sets it required. Colleen’s expertise in volunteer engagement and her ability to recruit senior leaders qualified her to take on a leadership role in building an integrated volunteer program at Red Cross.

Beyond operating under the chaos of a crisis, Colleen felt her progress was frustrated by the Red Cross’s structure that lacked clear lines of communication and accountability among the organization’s national, regional and local levels. During her on-going project, she reported to five different people who lacked clear lines of communication with each other. A lack of clear direction from staff resulted in the resignation of one skilled volunteer. She also encountered staff that was unfamiliar with the organization’s systems.

Despite the challenges, Susan and Colleen both consider the project experience successful, and continue to work toward preparing ERT to engage and integrate volunteers. Both parties still have much to do. Colleen speaks of meeting amazing, skilful people who are passionate about integrating volunteers.

4. Covenant House Vancouver

Staff Lead:	Sandy Cooke, <i>Executive Director</i>
Volunteer:	Mike Vanry, Vanry & Associates, Inc. <i>President</i>
Volunteer Role:	Executive Coach
Key Success:	“Working” outside the office – applying one’s particular skills to an entirely new sector in a new way – can hugely reinvigorate one’s passion for work and also open new avenues for business success.
Key Learning:	When working with an <i>individual’s</i> effectiveness and methods, one must be purposeful about connecting the individual gain to the organizational gain, or it may be hard to clarify the tangible impact after the fact.

Overview: Covenant House Vancouver exists for those young people for whom there is often no one else – young people who either have willingly fled physical, emotional and/or sexual abuse or been forced from their homes. Sandy Cooke was the founding Executive Director of Covenant House Vancouver and served that organization for eight years. Towards the end of his tenure, Sandy had the opportunity to attend an Association of Fundraising Professionals event at which Mike Vanry was the featured speaker. Mike was leading a conversation on how to align teams and coordinate action.

After the presentation, Sandy spoke to Mike, asking if he would consider serving as an executive coach to him. Mike eventually agreed to serve as Sandy’s personal coach pro bono. The pair developed a learning plan to guide them and set up bi-weekly phone calls. Three years later, the relationship and the invaluable work was still going.

The benefits of the project to Sandy and Covenant House were many. The biggest win was Sandy’s increased ability to frame organizational challenges better and approach solutions with the entire team focused on a shared goal. Mike came across Sandy’s path when he knew he needed to consider what would happen to Covenant House upon his departure. The immediate application of their work together was succession planning for Sandy’s departure, which yielded consistent knowledge transfer and the identification of a suitable successor. Timing, skill sets, individual work styles, passion and inclination seemed magically aligned for success.

When Mike began this volunteer role, he wanted to apply his skills to make a difference in the community. When approached by Sandy, he also realized that applying his skills to the voluntary sector might be a new avenue of work for him, and learning more about the sector and how his work applied would be beneficial to his company. In addition, Mike experienced his own work style for the very first time outside the parameters of a transactional relationship. He was paid in “thanks”, but more importantly by consistently hearing *how* his work was benefiting Sandy and Covenant House. Mike was inspired by the experience and re-inspired by his own profession in a new way through his work with Sandy.

5. Green Thumb Theatre

Staff Lead:	Ivan Habel, <i>General Manager</i>
Volunteer:	Brian Coleman, <i>Electronic Arts, Marketing Director</i>
Volunteer Role:	Outreach Assessment Volunteer
Key Success:	Learned how to involve volunteers in the future.
Key Learning:	The participating organization must set the volunteer project as a priority in order to give the volunteer and the project the attention they require.

Overview: In December 2004, Vantage Point and Green Thumb Theatre collaborated to test a skilled volunteering project. Brad Beattie, Business Development Manager at Vantage Point at the time, contacted Ivan to ask if he was interested in engaging a specifically skilled volunteer for the benefit of Green Thumb and for the benefit of Vantage Point in learning how best to launch a potential skilled volunteering program. Ivan agreed to engage a volunteer who could assess the organization’s outreach activities.

Brad contacted Brian Coleman, who served as the first specifically skilled volunteer of two who were involved in this project. Brian’s role was to “scope” the organization using his marketing background and determine what plan of action to pursue. Brian’s plan of action was to be carried out by another volunteer, whom he would mentor. Brian developed a job description for a marketing specialist, which was posted in August 2005 and eventually filled by a volunteer by the name of Megan. Unfortunately, Megan’s involvement never materialized and there was no follow-through on Brian’s recommended action plan by any participant in the project, somewhat due to staff transition at Vantage Point.

Ivan and Brian felt a real sense of failure in the project, given that the intended outcome as defined within Brian’s plan never materialized. There was a certain lack of commitment from all individuals involved, which largely stemmed from undefined roles and a lack of priority given to the project. In an organization where resources, time and people are scarce, the “nice to have” project wasn’t considered a top priority.

The project proved successful in that a specifically skilled volunteer was able to engage his skills by preparing a plan, which, when the appropriate time comes, Green Thumb will be able to put into action. It also informed Vantage Point in how to launch a skilled volunteering project, an intended and accomplished goal.

6. The Laurier Institution

Staff Lead:	Christine Hjorleifson, <i>Program Director</i>
Volunteer:	Vincent Tsai, <i>IT Professional</i>
Volunteer Role:	Computer Maintenance
Key Success:	Clearly defining the role and making sure that both the organization and the volunteer understood their responsibilities created a “bite-size” project that was easy to undertake.
Key Learning:	When engaging volunteers with specific skills, particularly technical ones, creating a shared language and understanding can be the most difficult part of the project.

Overview: One of three computers at The Laurier Institution was malfunctioning and unstable. As a result, volunteers at this small organization were unable to have their own work station and employees had to share other computers on which only certain information was available. With only two staff persons, The Laurier did not have a computer-based skill set on its payroll. Rather than spend valuable funds hiring a contract worker to identify and solve the computer’s problems, Christine decided to engage a volunteer with IT skills to resolve the issue. Christine had prior experience engaging IT volunteers and had met with great success.

Christine created a position description for the volunteer opportunity that clearly outlined the deliverables and responsibilities of the volunteer. She knew from prior experience that having specific parameters around the project was important to both attract a volunteer and create a working relationship in which all parties understood their role.

Vincent was a recent immigrant to Canada, and many had encouraged him to volunteer in the community to build his network, get Canadian experience on his resume and practice his English speaking skills. He was an IT professional with several years of experience. When considering volunteer opportunities available to him, he was looking for a situation in which he would feel most comfortable. As he was a newcomer to town and someone who was not a native English speaker, the position at The Laurier appealed to him because it required skills he knew he possessed. Vincent knew he would be at ease doing the work required of him.

The project was successful for everyone concerned. The computer was fixed and upgraded at very little cost. Vincent even introduced The Laurier to TechSoup, an IT organization that provides low cost IT solutions to the not-for-profit sector. Vincent got experience in Canada and expanded his network, not only to Christine and The Laurier, but to other community members to whom Christine offered him an introduction. Everyone’s goals for the project were met and upon the conclusion of the project, both parties said their goodbyes with new “raving fans” added to their contact lists.

7. Tetra Society of North America

Staff Lead:	Pat Tweedie, <i>National Coordinator</i>
Volunteer:	Marvin Pflug, <i>Civil Engineer</i>
Volunteer Role:	Engineering Project Manager
Key Success:	Keeping volunteers involved and integrated into the fabric of the organization creates long-lasting, mutually beneficial relationships.
Key Learning:	When approaching a challenging project, the ability to access other resources and colleagues in a structured way lends expertise and confidence, particularly for newer volunteers.

Overview: Volunteers *are* Tetra, according to National Coordinator Pat Tweedie. Without the more than 30 volunteers that manage the individual projects the organization oversees, Tetra would have no programming. Tetra is an organization founded on the idea that community volunteers have an amazing set of skills to offer. Tetra accepts applications from individuals who have physical disabilities and the organizations that serve them to find solutions to enable more independent and fulfilling living for these clients. Tetra’s workforce is made up of volunteers with expertise in engineering, design and occupational therapy.

Marvin Pflug is a retired civil engineer with a rich professional history working for Con-Force Structures Limited, Wastech and the Ministry of Transportation. Marvin grew up with volunteerism as a part of his life in a small town, and upon retirement increased his volunteer engagement in the community. He has been volunteering with Tetra almost three years, taking on about 4-5 projects per year.

In this instance, a man came to Tetra with a challenge. He played guitar before an accident permanently restricted the use of one of his arms. He could no longer hold a traditional guitar. On top of his engineering background, Marvin had a lifelong relationship with music, and currently plays saxophone with a jazz group. His unique skill set was ideally suited to work with this man to create a guitar he could play.

Marvin used his knowledge of music to bring forth the idea of using a Hawaiian guitar, which lies in the lap rather than requiring an arm for support of the instrument. Marvin then worked with others to develop a system of accessories that enabled the client to play the guitar, such as tools to assist in playing the chords. When all was said and done, Marvin even shared some sheet music he inherited from a relative that was specifically written for the Hawaiian guitar.

This project yielded a successful result and gave Marvin the opportunity to use his highly skilled background to work effectively in a community organization. Tetra takes on a variety of projects every year and each challenge is as unique as the volunteer that finds its solution. The team of volunteers that do the “work” of Tetra also meet monthly to network, share ideas and seek advice on more complicated projects. Each team member contributes his or her own specific expertise to the benefit of the community.

If only every group of skilled community members had a structured forum through which to share their time and expertise with others. Tetra is truly an example of how much impact volunteers’ skills can change the fabric of others’ lives.

8. Vancouver International Writers Festival

Staff Lead:	Jane Davidson, <i>General Manager</i>
Volunteer:	Don Prior, The Caldwell Partners, <i>Executive Recruiter</i>
Volunteer Role:	Executive Recruiter
Key Success:	Engaging a familiar volunteer overcome any politically sensitive and trust issues for a very sensitive project
Key Learning:	The makeup of the entire team for any project is paramount to its success. Just one great volunteer won't do. The entire team needs to complement each other's skills, and that includes volunteers.

Overview: Since 1988, the Vancouver International Writers Festival had become one of North America's premier literary events. After the 2005 festival, founder and Artistic Director Alma Lee was prepared to retire. Replacing both her vision and her history with the organization was a major challenge, and those involved knew that a new Artistic Director would be vital to take the Writers Festival to its next stage of existence.

The Board of the Writers Festival put together a Search Committee to oversee the recruitment of its new executive. One of the members of that committee was a former board member, Don Prior. Within two months of the creation of the committee, everyone acknowledged the group needed a professional recruiter to take the lead in managing the recruitment process. As Don was a professional recruiter in his day job, he agreed to change his role in the process – from Search Committee member to volunteer executive recruiter.

Although the mid-stream shift of his role during the process did create some blurry lines of responsibility, Don's experience volunteering with the Writers Festival was exceptional. From his perspective, he was given the opportunity to aid an organization with which he was already familiar and move with them into an important next stage. Don also realized what a great experience it was to volunteer his professional skills. He now asks associates that work for him in professional recruitment to take on volunteering opportunities to complement their skills and increase their learning opportunities.

For Jane and the Writers Festival, Don's participation as the executive recruiter in this process was vital to the project's success. Not only did Don contribute his expertise in terms of recruitment, job description creation, resume screening and interviewing, but he also managed the politically sensitive task of interacting with internal candidates. Because of an open (and small) office atmosphere, doing this diplomatically would have been difficult for Festival staff. Having the "outsider" volunteer – Don – oversee the process of communications and manage the privacy of applicants was a great benefit.

In addition to Don's individual contributions to the project, he complemented other volunteer contributions. First, Don recruited colleagues at his office to manage some of the administration for the project, taking away the burden of this daunting task from the Writers Festival's small staff. Second, Don worked seamlessly with the Search Committee, particularly its Chair, to whom he reported. When her talents were added to Don's and the other committee members, the power of the volunteers on the project to impact a successful outcome was exponentially increased, emphasizing the power of a well-recruited *team* of volunteers.

9. Westcoast Family Resources Society

Staff Lead:	Ann Kutcher, <i>Executive Director</i> Carol Anderson, <i>Development Director</i>
Volunteer:	Jon Morris, JDQ Systems, Inc., <i>President</i> (and team)
Volunteer Role:	Human Resources business process improvement specialists
Key Success:	Teamwork is instrumental in success. Having buy-in and participation from all volunteers at all levels and focusing on their connections to the organization and its staff and management will create an atmosphere in which success is possible.
Key Learning:	Managing expectations of all participants is important. If this is not addressed in the planning stages, it can be a big hurdle during the project.

Overview: Westcoast Family Resources Society (WFRS) was facing challenges with its HR systems. There was no one with HR expertise guiding them. All HR work for the 100 staff at the organization was carried out by non-HR personnel, off the side of their desk and in addition to their primary responsibilities. They knew they could use support, but didn't know what that might look like.

As WFRS was identifying their challenges, JDQ had recently created a new philosophy for approaching their business agenda, Three Spheres of Reciprocity. This system is a holistic view of business practice that equally emphasizes profiting, helping and learning. As part of the Three Spheres program, JDQ began a service grant program that connected employees' skills to organizations that needed help. WFRS applied and was the first recipient of the JDQ service grant.

JDQ enlisted a team of five volunteers comprised of JDQ employees and members of ASQ (American Society for Quality). These volunteers connected with members of WFRS's staff to tackle the HR issues. JDQ largely managed the project, using their project management systems and templates used in other facets of their business. The entire team was instrumental in defining the problems, brainstorming ideas and finally executing on the agreed upon solutions.

The project with WFRS was their JDQ's service grant, and most of the effort eventually went into creating a successful outcome of the project specifics, rather than maintaining a focus on their overarching goals. Each team member had their own motivations for volunteering, and all found a unique satisfaction in the experience.

WFRS was not very sophisticated in terms of engaging volunteers with such a specific and high skill level as the members of the JDQ/ASQ team. The organization staff was wary of the company's motivations for engaging with them, and worried that an underlying sales agenda would surface. Their fears were in no way realized, however, and from the beginning WFRS began to realize just how lucky they were to have such amazing expertise offered to them.

In the end, most of the solutions were simple and incredibly effective. The issues at the organization really just needed some systematic analysis and an outside perspective. The results were tangible and immense. The participants were all happy with the experience, and ready to "do it again".

Managing expectations of all participants is important. If this is not addressed in the planning stages, it can be a big hurdle during the project.

Appendix 2 – Interview Detail

Vantage Point interviewed the not-for-profit organization administrators and the specifically-skilled volunteers they engaged. The conclusions found in this document are based on the personal interview questions outlined in the following documents.

1. Interview Document – Organization

Vantage Point is in the process of developing the *GoVolunteer Probono Pilot Program* and appreciates your willingness to share your past experience with skilled volunteers as part of a learning exercise for the program. Your involvement will provide invaluable knowledge toward the development of the program that will facilitate the integration of specifically skilled volunteers into the voluntary sector workforce.

Vantage Point’s mission is to inspire and build leadership in the voluntary sector, and we truly appreciate your help toward that end by participating in this research.

During the 30- to 45-minute interview, I will be gathering your responses to the questions below. I hope that by providing you the questions before-hand, you might feel a little better prepared for the discussion. **Please don’t feel you need to complete this document in advance.**

I look forward to speaking to you in person,

Kathy Curran, *GoVolunteer Probono Program Researcher*

June 29, 2006

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Interview Questions

Your personal data

1. First and last name
2. Title

Your volunteer’s data

3. Name and Title of Skilled Volunteer:
4. Nature of volunteer activity:
5. Duration (i.e. # of months, weeks, etc):
6. Name and Title of individual volunteer reported to:

Your organization’s data

7. Organization’s name
8. City
9. Founding Date
10. Number of employees
11. Number of board members
12. Number of volunteers regularly engaged in your organization (excluding board members)
13. Annual operating budget
14. Service area (arts, health, community development, etc.)

Skilled Volunteering Project Experience

15. Who determined the scope of this role, you or the volunteer?
16. Did you have a job description for this experience?
17. Did you sign a volunteer contract for this experience? If yes, can we have copies?
18. How many hours did you work with the volunteer?
19. Did the hours you worked match your expectations?
20. Do you think the volunteer's work for your organization provided a tangible benefit to the organization?
 - Exceeded expectations
 - Met expectations
 - Below expectations
21. Was other staff besides yourself involved in the engagement of this skilled volunteer?
22. Whom and to what extent?
23. To what level of satisfaction did the skilled volunteer perform his/her role?
 - Exceeded expectations
 - Met expectations
 - Below expectations
24. Through the involvement of the skilled volunteer, did your organization grow its ability to deliver its services efficiently and effectively?
25. Were your goals for engaging this volunteer realized?
26. How familiar were you with engaging skilled volunteers prior to this experience?
 - Very familiar
 - Somewhat familiar
 - Not familiar
27. Are volunteers formally involved in the strategic assessment of or planning for your organization? If yes, in what way?
28. Did your experience with this skilled volunteer cultivate a greater appreciation for specifically skilled volunteers within your organization?
29. Have you or will you continue to engage specifically-skilled volunteers after this experience?
30. Will you add non-Board member volunteer input to your organization's long-term strategic plans?
31. Would your organization participate in a program aimed at engaging specifically skilled volunteers at your organization?
32. Would you recommend such a program to other NFPs?
33. Would you pay for such a program?
34. Do you have any recommendations on how engaging specifically skilled volunteers can be more successful?

2. Interview Document – Volunteer

Vantage Point is in the process of developing the *GoVolunteer Probono Pilot Program* and appreciates your willingness to share your past experience with skilled volunteers as part of a learning exercise for the program. Your involvement will provide invaluable knowledge toward the development of the program that will facilitate the integration of specifically skilled volunteers into the voluntary sector workforce.

Vantage Point’s mission is to inspire and build leadership in the voluntary sector, and we truly appreciate your help toward that end by participating in this research.

During the 30- to 45-minute interview, I will be gathering your responses to the questions below. I hope that by providing you the questions before-hand, you might feel a little better prepared for the discussion. **Please don’t feel you need to complete this document in advance.**

I look forward to speaking to you in person,

Kathy Curran, *GoVolunteer Probono Program Researcher*

June 29, 2006

.....

Interview Questions

Your personal data

1. First and last name:
2. Title:
3. Current Employer:
4. Employer at time of volunteer service:

Organization data

5. Nature of volunteer activity:
6. Name of Not-for-Profit Organization:
7. Name and Title of individual you reported to:
8. Duration (i.e. # of months, weeks, etc):

Skilled volunteering project experience

9. Who determined the scope of this role, you or the organization staff person?
10. Did you have a job description for this experience?

11. Did you sign a volunteer contract for this experience? If yes, can we have copies?
12. How many hours did you work? Did the hours you worked match your expectations?
13. Do you think your work as a volunteer provided a tangible benefit to the organization?
14. Did you feel your skill set was a good fit for this role at the organization?
15. Did you find that you were able to fully engage your skills?
16. Were you provided with an adequate level of input from the organization’s Executive Director or other staff?
Too much

Adequate

Too little

17. What were your goals for the experience?
18. Where your goals met?

19. Did you experience other, unexpected benefits?
20. What were your challenges in this position?
21. Did you remain engaged with the organization after the project was completed?
If yes, in what capacity?

22. Would you participate in another short-term volunteer experience aimed at engaging your specific skill set?
23. Would you recommend skills-based volunteering programs to others?
24. On a scale of 1-10 (1-poor/10-excellent), how would you rate your overall experience?
25. How could your experience have been improved?

Appendix 3 – Similar Programming Models

The following resources list highlights other organizations that have a skilled volunteering program. Most have different execution strategies than GoVolunteer Probono, but can absolutely lend credence to the body of work here and future efforts to systematically engage specifically skilled volunteers in the voluntary sector.

CentrePoint Non-Profit Management – Ontario, Canada (www.thecentrepoint.ca)

CentrePoint engages over 250 volunteers to fulfill its mission of strengthening the nonprofit sector through consulting, mentoring, training, and knowledge sharing. Volunteers with expertise in the areas of Board Governance, Strategy, Business Planning, Human Resources, Technology or Marketing act as consultants in the nonprofit sector, as well as assist in coordinating training programs, planning special events, delivering presentations, or recruiting other volunteers.

Circuitriders – United Kingdom (www.lasa.org.uk/circuitriders/)

CircuitRiders helps voluntary sector organizations learn about and make effective use of technology. Volunteers provide hands-on technical assistance, staff training, and consultation on IT strategies that support the organization's mission. A circuit rider can be an individual working independently, or be part of a loose-knit team of peers. Riders can also be employed by a voluntary organization geared towards offering technology assistance to other agencies.

Community Consulting Teams Atlanta – Georgia, United States (www.cctatlanta.org)

Each year, CCT Atlanta selects 10 non-profit organization projects through an application process and forms teams of four to six highly skilled volunteers to work on the project over 6 months. CCT Atlanta focuses on projects requiring business/management analysis and problem solving, including areas of marketing and fundraising. The match is carefully facilitated by CCT, with specific criteria for volunteer and NFP applicants.

COMPASS DC – Washington DC, United States (www.compassdc.com)

COMPASS is a probono consultant group of MBA students. Each year, COMPASS selects a handful of nonprofit projects to be completed by a group of volunteers in 4-6 months. Areas of focus include strategic planning, organizational development, finance, and marketing.

CompuMentor – California, United States (www.compumentor.org)

Compumentor recruits IT professionals to act as volunteer mentors to small to mid-sized nonprofit organizations. Clients work alongside mentors to learn new skills and update old ones so that they can better manage and maintain their technology. The projects are based on the organizations' specific needs.

Goodcompany – Australia (www.goodcompany.com.au/)

Goodcompany matches the skills of professionals with the needs of community groups in Australia. The matching process occurs on the website, where charity groups list the expertise desired, and volunteers list their skills. Once a suitable match is made, the organization and volunteer work directly with each other. Goodcompany is currently conducting a pilot employee volunteer program for corporations where employees can apply their specific skills to community projects.

Greater DC Cares – Washington DC, United States (www.dc-cares.org)

The Skills Based Program makes the initial connection between a skilled professional and nonprofit organization through an application process and provides support for both parties during the project. The Program focuses on IT, financial services, marketing, and organizational development.

IT4Communities – United Kingdom (www.it4communities.org.uk)

IT4Communities is dedicated to promoting volunteerism among IT Professionals and companies by connecting them with organizations in the voluntary and community sector in need of IT help. Organizations and volunteers register online, and it is then up to the volunteer to find a suitable organization with which to work.

Management Advisory Service (MAS) – Ontario, Canada (www.masadvise.ca)

The Management Advisory Service is comprised of volunteer consultants with extensive experience in management and technical areas, in both the private and public sectors. The program aims to improve the ability of nonprofit organizations to better serve their clients while giving management consultants an opportunity to give back to their community. Volunteers assist in areas such as developing a budgeting and financial control system, developing a communication plan, and helping a Board of Directors understand governance practices.

MAP for Nonprofits – Minnesota, United States (www.mapfor nonprofits.org)

MAP for Nonprofits engages a combination of paid staff, management consultants, and volunteers to assist nonprofits in achieving their strategic objectives in areas ranging from financial management to legal services to business planning. Hundreds of volunteers are engaged each year to act as management consultants or nonprofit board members. Volunteers are required to apply for a position, and are then matched with a suitable project.

The Media Foundation – Ontario, Canada (www.themediafoundation.com)

The Media Foundation connects communications professionals with the voluntary sector to share their skills and expertise. The Media Foundations delivers seminars and events where communication experts give practical advice regarding many different areas of communications. The Media Matching program pairs voluntary organizations and communication professionals to address specific communication concerns and develop the organization's full communications potential.

The Partnership Platform – Ontario, Canada (www.partnershipplatform.ca)

The Partnership Platform fosters a relationship between IT professionals and nonprofits that need their help. The NFP completes an online questionnaire that is turned into a technology project profile which can be viewed online by potential volunteers. Partnership coordinators will help set the relationship and launch the project, and provide assistance during the project. Partnership Platform actively promotes volunteerism to IT corporations and people with IT skills.

ProBono Australia - Australia (www.volunteermatch.com.au/)

Volunteer Match is another online-facilitated connecting piece for NFPs and skilled professionals. Volunteers and NFPs create online profiles and volunteers are notified through email about suitable positions. Volunteers and NFPs are responsible for connecting with each other.

Reach - United Kingdom (www.reach-online.org.uk)

REACH connects skilled professionals with managerial, business, and technical experience with part-time voluntary roles throughout the UK. Volunteers and organizations are required to register with REACH so that the appropriate matches can be made. REACH expects to place more than 1500 volunteers in a year.

Rotman School of Management – Ontario, Canada (www.rotman.utoronto.ca/nexus)

Rotman NeXus is a nonprofit management consulting agency made up of MBA students at University of Toronto’s Rotman School of Management. The students work with nonprofit organizations and social enterprises to build capacity, explore new revenue streams, and broaden their networks for financial and community support. Students are paired with a client, and are mentored by a professional consultant and nonprofit manager.

Taproot Foundation – United States (www.taprootfoundation.org)

The Taproot Foundation aims to strengthen nonprofit organizations by engaging business professionals in service. The Foundation facilitates structured, high quality pro bono work by professionals. Unlike traditional foundations that make cash grants, the Taproot Foundation offers ‘service grants’ to organizations in the areas of fundraising, marketing, IT, or HR. Volunteers are engaged through an application process with Taproot.

About Vantage Point

Vantage Point offers leading-edge learning opportunities for not-for-profit executives and boards of directors. We work with you to attract, meaningfully engage and integrate the abundance of talent available to you. By mindfully engaging passionate citizens you can stretch budgets and human resources further to create an abundant not-for-profit.

 facebook.com/vantagepnt

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 [@vantagepnt](https://twitter.com/vantagepnt)

Where will the talent take you?
For more information, visit our website

 thevantagepoint.ca

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