



**Boomers & Babies Project  
The Oregon Community Foundation**

**Learning Community Convening  
March 8, 2013**

**Skill Building Session for Funded Partners**

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***Next Step: Skilled Volunteers!***

**Introduction**

- **Why focus now on Skilled Volunteers (SV)?**
  - Although some of you have been engaging skilled volunteers and certainly working directly with children takes skill, it is also true that there is another type of volunteer that you are now prepared to focus on. This group can advance the capacity of your organization yet, it may take some tweaking of your volunteer infrastructure in order to do it well. Just as before, it takes an investment and there is a potential pay-off for your entire agency.
- **What is a skilled volunteer and how have you been engaging them?**
  - *“Skills-based volunteerism is service by individuals or groups that capitalizes on personal talents or core business skills, experience or education.”* Points of Light Foundation
  - SVing is usually project based, time-limited and strategically planned or implemented in response to a specific capacity need or a situation, such as disaster response.
  - Potential titles: Pro-Bono, Professional Volunteer, Leadership Volunteer, Encore Worker
  - There are skilled volunteers of all ages who want to contribute to the social good, however as we have learned, Boomers have had years of experience, are increasingly available for project based work, desire community, are self-directed, want to learn and grow in new settings and they want to contribute in meaningful ways.
  - Examples of Skilled Volunteer positions? Strategy, marketing, financials, cooking, teaching...

**How to get Started**

- **Organizational Buy-in:** Just as before, be sure that you have the expressed support of executive management to engage your staff and Board (a group of skilled volunteers!) in brainstorming the pros & cons of intentionally engaging skilled volunteers. Talk through the concerns and resistance. Begin to imagine the possibilities.
- **Identify Needs:** Conduct a needs assessment for back-burner projects that could be moved forward by SVs. Lead a brainstorming session during a Board or staff meeting, seeding it with suggested projects if necessary. “If time or money were no object, what time-based project would support you in your work?”
- **Organizational Alignment:** Be sure that the project is linked to organizational goals and resources so that the work and outcomes are relevant and can be implemented.
- **Start Small:** Propose a pilot project in which to slowly begin this type of volunteer engagement – choose a project that is fairly low-risk, can be easily resourced and has a short timeline for completion.

### Developing the Supportive Infrastructure

- **Organizational Readiness:** Review current volunteer policies, procedures and handbook to be sure that they address the issues and needs of time-based volunteer projects that require professional expertise. How might the infrastructure and staff involvement need to be different?
- **Project Readiness:** Role Clarity
  - Position Description needs to specify a clear description of the project goals; timeline; indicators for project accountability and success; available resources for successful completion; identify a staff point person or collaborative team;
  - Importantly, the position description should specify how this project supports the mission and vision of the organization, establishing its importance in the larger scheme of things.
  - Providing this supportive structure supports the volunteer's success and enthusiasm while keeping the work aligned with the organization's true needs and expectations.

### Recruiting Skilled Volunteers

- **Brainstorm ideas:** ask staff, friends or other volunteers about fruitful ways to source SVs for specific projects. Think creatively about the skills needed for the project and whether you could use transferrable skills and avocational skills or whether very specific professional skills are needed.
- **Examples of SV sources:** professional service firms; corporations; professionals you hear about by word-of-mouth; Board members, staff, donors, social media, professional schools and professional associations.
- **Position Posting:** Create a compelling and brief position posting that is descriptive and brief while inspirationally tying the project to mission and meaningful work. The posting is an abbreviated version of the project/position description.
- **Explore the fit:** Invite the potential SV to contact you to discuss the project. At this time you can share the project/position description. Also, refer to Taproot's "application-template" for suggested ways to be prepared for this conversation. If a particular SV is not the right fit, ask if they know who might be. Often one thing leads to another and voila! you've found your Skilled Volunteer!

### Orienting the Skilled Volunteer

- **Assess knowledge base:** Don't assume that the SV enters this venture with all of the necessary knowledge. The SV may know about accounting, for example, but not know all of the fiscal requirements of early childhood organizations. As you discuss the project with the SV, develop a list of information that the SV needs in order to be successful and a plan for closing the knowledge gap.
- **Provide Orientation:** Provide the SV with the agency orientation that you provide to direct service volunteers. The SV will be more effective with their specialized project if he or she understands the larger context and mission to which their project is contributing. This will also help to inspire them in their work.
- **Address expectations:** Discuss the SV's expectations and address them up-front as best possible.
- **Introductions:** As you introduce the SV to your staff and volunteers, you may want to introduce them as a "consultant working for free" or "Pro Bono consultant" or develop a standard title to use.

### Creating the Project Work Plan

- **Creative input while planning:** Even though it is the Volunteer Coordinator's and staff's responsibility to prepare for a successful SV engagement, it is also important to NOT micro-manage the work and how it gets done. Allowing some degrees of freedom for the volunteer's creativity and professional know-how will provide a more stimulating and fulfilling experience for the volunteer and invite new ideas to the table. Rather than prescribing the work tasks, ask the volunteer to submit a Work Plan with a clearly defined scope, defined deliverables, timelines, identified milestones and necessary resources. The Work Plan should include established check-in points with key staff; and, a process to align the phases of work with agency goals, resources and needs. And, if the SV is new to your organization, then a staff person may need to co-develop this plan.

- **Sustaining the Project:** Included in this Work Plan should be a Post-Project Support Plan to help ensure the sustainability of project outcomes. This can be sketched out during the outset of the project and refined as the project is closer to completion. It will likely require involvement from the SV and selected staff.
- **Supervision**
  - Identify a staff point person to which the SV can report and consult regarding the project.
  - Having the SV work with a staff point person or team will help them to keep the work applicable to the agency and help the SV to integrate with staff. If the SV comes from a for-profit background, the deliverables need to be transferable to the non-profit setting.
  - Ask the staff point person and the SV to specify in the project Work Plan how they will be communicating with you and other staff and keeping the project on-track.
  - Use titles other than “supervisor” such as “staff point person” or “staff lead” or “staff support person.”

### Challenges to Manage

- **Scope Creep:** As one proceeds with the work, unforeseen tasks and tangents often arise. These need to be vetted by the SV and staff point person to determine how this may or may not impact the Work Plan. These issues need to be strategically dealt with so that the work remains within the necessary timeline and capacity of the SV and the organization, while providing the most useful outcomes possible.
- **Time Sensitivity:** Projects vary in their necessity for completion by a time sensitive deadline. Projects for SVs should involve goals and outcomes that can withstand some time slippage. Because SVs have competing activities in their lives, some flexibility is necessary. However, their time also needs to be respected and repeated delays due to a lack of organizational readiness can be frustrating to SVs and could lead to their withdrawal from the project or to unsatisfactory results.
- **Sector Knowledge:** It is important to establish whether the SV’s knowledge base is applicable to your non-profit setting. Although often skills and knowledge are transferable, it is important not to assume transferability just because someone is an experienced professional. Bringing in out-of-sector ideas can lead to innovation, but the ideas need to be actionable and sustainable.

### Project Review: Outcomes, Evaluation & Celebration

- **Share Project Outcomes** - Once the project is completed, discuss with the SV and the staff point person a plan for disseminating the project outcomes to the appropriate stakeholders.
- **Include the SV** - Plan to have the SV participate in the presentation of the project. This is rewarding!
- **Evaluate the Project** - Ask the SV and the staff point person to complete an evaluation of the project outcomes, reflecting back on the Work Plan, timelines, resources, unanticipated barriers, what worked well, what needed to be changed, etc. Apply your learning to the next SV project!
- **Celebrate** - Honor the work and expertise of the SV and also acknowledge the SV/Point Person team. This honors the work and the team, reinforcing the idea that engaged staff are integral to a successful volunteer program.
- **Tell the Story!** If possible, have a staff person or SV write a feature article about the completed project and how the SV’s contribution made a meaningful difference. You can use this to celebrate the SV and work accomplished as well as a recruiting tool for other SVs or as a part of a grant proposal for volunteer management funding.

### Skilled Volunteering Resources

[ReadinessRoadmap.org](http://ReadinessRoadmap.org)

[HandOnNetwork.org](http://HandOnNetwork.org)

[TaprootFoundation.org](http://TaprootFoundation.org)

[CommonImpact.org](http://CommonImpact.org)