Skills Based Volunteering

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Introduction

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Agenda

Learning Objectives

- Skills Based Volunteering (SBV) Overview: How to engage skilled volunteers
- Nonprofit Perspective: Learnings from the field
- Tools & Resources: Where to go for more
Common Impact catalyzes a new, connected economy by aligning business and social purpose.
Skills-Based Volunteering (SBV) is the practice of lending one’s specific professional expertise to community organizations in a way that helps them affect social change.
SBV Overview: Why is it important?
Corporate Social Responsibility Trends

CECP’s Giving In Numbers Report

The analysis of trends reveals that volunteering opportunities and employee engagement remain strong and growing in terms of participation rate. In this sense, employees appreciate having more options of volunteering and matching-gift programs.

In 2017, 93% of all surveyed companies reported having an employee-volunteer program.

Companies are tracking the value of their SBV work. Average value went from $383,000 in 2015 to $575,000 in 2017.

56% of companies offered SBV programs.
Why SBV

Why are companies excited

- **Employee Engagement & Retention**: Companies that offer SBV programs have higher average Net promoter scores.

- **Talent Development**: Employees engaged in SBV are 3x more likely to get work related skill development.

- **Recruitment**: 55% of Millennials make their career decisions based on the CSR | pro-social work of their future employer.

- **Social Impact**: Companies are increasingly looking at creating deeper impact with a smaller number of partners.
Limited funding exists for nonprofit business infrastructure such as strategy, marketing, technology, and finance.

The average nonprofit reports spending only 2% of its total budget on overhead compared to the 35% average traditionally spent by companies to build a strong infrastructure.
Infrastructure Needs

Common Nonprofit Challenges

- Marketing
- Strategic Planning
- Development Strategies
- Employee Recruitment
- Technology Training
- Volunteer Retention
- Staff Retention
- Program Development
Nonprofits are excited...

*The landscape*

- **72%** of nonprofits believe they could increase their impact with the use of skills based volunteers

- **90%** of nonprofits report needing more volunteer support

...but

- many nonprofits **struggle to access effective SBV and integrate it as a strategic, proactive resource**
Key Challenges

The landscape

I want to use SBV but...

- Unsure where to start
- Deprioritized by my Board and Staff
- Lack of Access to skilled volunteers
Challenges

What has kept your organization from engaging in SBV?

What other challenges exist in implementing quality SBV programming and projects?
SBV Overview: How to get started
The Model

Key Steps in SBV Process

Determining Organizational Readiness for Skills-Based Volunteering
is an organization is at the right point in its lifecycle to engage skilled volunteers

Project Identification and Scoping
exploring organizational need and defining the ideal deliverable

Recruiting Skills-Based Volunteers
translate needs into a corporate pitch and tap into new or existing corporate networks

Project Management
documenting requirements and key milestones and volunteer management

Project Evaluation
improve processes for future projects, and provide proof points on the value of SBV
Project Readiness

Does your project have all the indicators of a strong project?

**Defined Project Goals**
- Clear understanding of how the project will feed into your long-term strategic goals and you can articulate why it is important to solve the problem the project addresses.

**Defined Project Scope**
- The project is cohesive, addresses a core issue within your organization and takes into account the time commitment and capacity of the volunteer(s).

**Project Prioritization**
- The project is integral to your day-to-day work, increases staff capacity to execute, and has a sufficient level of buy-in from executive management and the board of directors.

**Project Leadership**
- Identification of a project lead who has the capacity to support the volunteer(s), a deep understanding of the challenge the project addresses, and the ability to make decisions autonomously.

**Post-Project Support Plan**
- Commitment to obtaining the resources to sustain the project work overtime.
Project Scoping

Start with projects that...

✓ Are narrow in focus
  • One functional area
  • One core capacity building need

✓ Have a clearly defined deliverable
  • Make sure the deliverable is realistic for the volunteer commitment
Project Scoping: Break it Down

Often a highly complex project can be broken down into stages, and a few quick identified hits that can make a big difference in a short period of time

✔ Break the challenge into components
  ❑ *For example:* deeply assessing and selecting a solution, executing a solution, rolling it out to staff

✔ Are there any quick hits?
  ❑ *For example:* Is there an excel template you can create and share with staff that would alleviate a major challenge?
Marketing

Skilled volunteers can help to **shift** a nonprofit’s position in the marketplace by helping to **re-envision** their marketing strategy and allow for **greater reach** among targeted audiences.

<table>
<thead>
<tr>
<th>Peer Assessment</th>
<th>Collateral Assessment</th>
<th>Digital Communications Plan</th>
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<tr>
<td>• Conduct research of peer organizations and clarify an organization’s unique value proposition</td>
<td>• Analyze materials and share feedback on how to achieve greater alignment or better communicate impact</td>
<td>• Craft an integrated digital communication plan to ensure consistency across platforms and assets</td>
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Technology

Skilled volunteers can assist in technology needs by assessing nonprofit’s pain points and determining solutions to revamp nonprofit’s systems.

**Website Development**
- Add functionality to an existing website or create a new site that engages a key constituents more effectively

**Database Recommendation**
- Assess nonprofit’s needs for a system to support key business operations and make a product recommendation

**Platform Training**
- Conduct training on a platform, system or software such as Salesforce, Microsoft Office Suite, WordPress, Adobe Creative Suite, etc.
Sample Skills-Based Project Template

[Project Title]: [Project Length]

Project Goals
[A high level overview of the nonprofit, its mission, and a description of the current state that is leading to the project need. End the paragraph with a statement on how the project outcome will impact the nonprofit and its mission.]

Project Description
A volunteer(s) will…[succinct summary of the project, stating the final deliverable]

Project Phases/Milestones
[Insert project phases and milestones for the project]
  o [Often discovery where a volunteer(s) develops an understanding of your nonprofit’s work, your current state, and future goals around the particular project area]
  o [Additional milestones to bring the volunteer(s) from discovery to development of the final deliverable]
  o [Write out final milestone, stating the final deliverable]

Skills Needed: [Inserts skills needed]
Project: HR Processes Audit and Assessment

Project Goals
Nonprofit provides seed funding for startups led by underrepresented individuals in tech. The organization has plans to expand into other regions. With a small staff of three full-time employees and a handful of part-time employees, the team has operated limited HR functions, allocating duties mainly to the Managing Director. Though these processes have been adequate for the current staff size, without a seasoned HR professional on their team they feel they lack the expertise necessary to build processes that are more comprehensive for the adequate onboarding and management of additional staff. They seek support in assessing their current HR processes and identifying areas that necessitate improvement to ensure they have efficient HR functions that adhere to best practices. A stronger HR foundation will reduce their organizational risk and improve their operations and future planning.

Project Description
A team of volunteers will conduct an audit of nonprofits current HR processes and deliver an assessment highlighting any areas in need of improvement, and providing recommendations for opportunities to enhance HR processes that will ensure strong HR procedures are in place to support organizational growth.

Project Milestones
- Develop an understanding of nonprofit's work, their current staffing structure and goals for growth, as well as their current HR structure and any challenges associated.
- Perform an in-depth audit of nonprofit's HR processes. Assess areas in need of process improvement and begin to develop recommendations for nonprofit to enhance their HR processes to better align with best practices.
- Share documented recommendations with an implementation road map that prioritizes the steps to be taken by nonprofit to align their HR processes with best practices and support efficiency in management of staff growth.

Corporate Team Skills Needed
Project Management, HR Generalist, HR Strategy/Strategic Planning, Process Improvement, Training & Documentation
Common Sources

Planning for Skills-Based Volunteering as a Resource

✓ Board of Directors/Advisory Board
✓ Corporations (both existing and new)
✓ Individuals in your networks
✓ Local intermediary organizations (Volunteer connector organizations)
✓ National, web-based intermediary resources such as Taproot +, Catchafire
✓ Traditional volunteer matching technologies such as Linkedin for Nonprofits, AllforGood, VolunteerMatch, and more
Serve Ohio & Common Impact Partnership
The Need for SBV Training

Nonprofits in Ohio

- Nonprofits expressed desire to engage skilled volunteers but didn’t know how to do it effectively.
- Many nonprofits had poor experiences in the past and were hesitant to do SBV again.
- Hearing from companies that they wanted to have a deeper engagement with nonprofits than painting walls.
Training Academy

Program Components

Nonprofit Application
- Nonprofits completed application to be considered for the cohort

SBV Boot Camp
- Two-day training covering SBV best practices and key processes

Ongoing Support
- Monthly technical assistance calls & quarterly cohort training
Nonprofit Perspective: Learning from the field
Nonprofit Perspective

Reflections from Cohort 1

A team will review current audience segments and existing key messages to determine gaps and opportunities and refine messaging to better align with the motivations and barriers of each constituent group.

A team of volunteers will create a digital communications plan that will provide a compelling call to action and recruit needed volunteer coaches.
REFLECTIONS: Keys to success

Volunteer Recruitment

- Important to leverage existing relationships and corporate recruitment avenues
- If relationships aren’t present, provide significant lead time (and incorporate into project planning)
REFLECTIONS: Keys to success

Project Scoping

- Projects need to be narrow in focus, with a clear deliverable
- Invest time into exploring organizational needs and desired outcomes
- Gain consensus about what is most valuable

SBV Project
REFLECTIONS: Keys to success

Organizational Stability

• Leadership or department turnover creates timing challenges

• Major changes in funding, structure, programming, capacity can affect SBV projects
REFLECTIONS: Keys to success

SBV Buy-in

- Excitement about and commitment to SBV from leadership and key staff
- Support in recruitment, decision-making, funding, capacity
Tools & Resources: Where to go for more!
Nonprofit Skills-Based Volunteering Toolkit

A guide to engaging in skills-based volunteerism
Capacity Commons provides social sector organizations with:

- **Education** about skills-based volunteerism as a tool to build capacity and leadership
- **Tools and Tips** that guide you through preparing your organization, scoping pro bono projects, finding the right volunteers, managing the partnership and evaluating impact
- **Peer Examples** to spark ideation and jumpstart your project with existing pro bono deliverables
- **Connection to Skilled Volunteers** via referral partners and integration with online matching platforms

**LEARN:** Join our session on 6/19 at 2:00!

**VISIT:** [www.capacitycommons.org](http://www.capacitycommons.org)

**SHARE:** #capacitycommons @CommonImpact
SBV Training Academy Program

Year 2 Next Steps

SBV Webinars
- SBV best practices
- Project scoping, volunteer recruitment, engagement management

Cohort 2 Application
- Online application for consideration in cohort 2 released in December

2020 Boot Camp
- Tentatively scheduled for March 2020 in Columbus
Questions