Nonprofit Skills-Based Volunteering Toolkit

A guide to engaging in skills-based volunteerism

common impact

SERVE OHIO
Ohio Commission on Service and Volunteerism

Capacity Building Skills-Based Volunteering

Skills-based volunteering (SBV) is the practice of lending one's professional expertise, such as marketing, finance or human resources skills, to build the capacity of community organizations. **Capacity building is whatever is needed to bring a nonprofit to the next level of operational, programmatic, financial or organizational maturity so it may more effectively and efficiently advance its mission into the future.**[1] Skills-based volunteering can take many forms, but the focus of this toolkit is to support nonprofits in developing capacity building SBV projects focused on operational or administrative functions – **activities that a nonprofit might otherwise have to pay for specialists or additional staff to support**. Projects that build organizational capacity include developing a marketing plan, assessing HR policies and procedures, implementing databases and more.

> *"Capacity building is an investment in the effectiveness and future sustainability of a nonprofit."*[2]

SERVE OHIO
Ohio Commission on Service and Volunteerism

ServeOhio empowers communities to utilize AmeriCorps members and volunteers to address frontline issues in education, health, economic opportunity, and environmental stewardship. As Ohio's Commission on Service and Volunteerism, ServeOhio collaborates and partners with nonprofit, government, and community organizations to increase the effective utilization of AmeriCorps and community volunteers for the purpose of building a stronger Ohio.

As part of their goal to increase the effective utilization of volunteers, ServeOhio seeks to **increase the capacity of Ohio nonprofits to recruit, engage and retain skills-based volunteers.** To achieve this goal, ServeOhio has partnered with Common Impact to develop this comprehensive toolkit, which includes detailed instructions and resources for nonprofits to utilize when engaging in skills-based volunteering.

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[1] National Council of Nonprofits (2015). A Network Approach to Capacity Building. Retrieved from https://www.councilofnonprofits.org/sites/default/files/documents/a-network-approach-to-capacity-building.pdf
[2] National Council of Nonprofits (2016). What is Capacity Building? Retrieved from https://www.councilofnonprofits.org/tools-resources/what-capacity-building

Common Impact is a nationally recognized nonprofit that works to build a society in which individuals and businesses invest their unique talents towards a shared purpose: *strengthening the local communities in which we live and work.* We connect corporate employees to nonprofit organizations via clearly defined volunteer engagement opportunities to tackle the greatest challenges our communities face.

With a deep understanding of both mission-focused and business goals, Common Impact enables nonprofits to achieve even greater results by connecting them directly with skilled volunteers with expertise in areas that can build their organizational capacity and drive change.

Through a proven model of understanding corporate motivations and goals, deeply assessing nonprofit needs, defining impactful projects and matching and managing volunteers, Common Impact has helped hundreds of nonprofits and engaged thousands of volunteers.

Social Return on Investment	Cross Sector Engagements	Fortune 500 Partners
$21M	700+	20

About the Toolkit

We hear from many nonprofit partners that they do not know where to start when considering how to engage skilled volunteers or that the process feels overwhelming. The goal of this toolkit is to serve as a starting place for nonprofits by providing a complete set of guidance and resources in a single place. This toolkit will enable nonprofits to:

- ✓ Understand the need for SBV and how it can be a solution to addressing some of our communities' most complex issues
- ✓ Walk through the important steps in the process of executing skilled volunteering projects from assessing an organization's readiness to evaluating the success of projects
- ✓ Learn from real-world examples of successful projects that can spur ideas for their engagements
- ✓ Utilize tools, guides and worksheets that can be completed or customized to a specific nonprofit's needs

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Key Steps

It's important to tackle skills-based volunteering planning intentionally and thoughtfully. Projects that are planned well can have amazing results for nonprofits including increased fundraising, stronger programming, deeper evaluation and so much more! The graphic below highlights the key steps in the process, beginning with assessing an organization's readiness through evaluating the project.

Determining Organizational Readiness for Skills-Based Volunteering

Before embarking on a project, it is important to understand if an organization is at the **right point in its lifecycle to engage skilled volunteers and to implement recommendations**. If an organization is going through significant internal changes or has limited experience in engaging with volunteers for example, it would not be an ideal time to attempt an SBV project. If your organization isn't ready currently, the toolkit links to a myriad of resources to help increase readiness in each critical area.

Identifying and Scoping your Project

The most important and time intensive step in the process is the actual project identification and planning, also referred to as **project scoping**. Typically, multiple staff are involved in the process, which spans **from exploring the causes and elements of the organizational challenge to defining an ideal result or deliverable**. This toolkit includes a step-by-step guide to translate organizational needs into time-bound projects, criteria to assess project readiness and tools to calculate the costs and benefits of utilizing skilled volunteers.

Recruiting Skills-Based Volunteers

With a project defined and documented, it's time to start recruiting skilled volunteers. Utilizing the project description, **nonprofits can translate their needs into a corporate pitch** containing key details and an ask for support. This toolkit contains resources to craft your recruitment messaging and recommendations on how to explore partnerships with new or existing corporate supporters.

Managing your Project

Once volunteers have been recruited, a solid foundation is needed to ensure that expectations are clear and all parties are set up for success. **Documenting project requirements, key milestones and a general timeline will help get everyone on the same page and moving towards a shared goal**. This toolkit section contains templates, customizable project documentation and general best practices to support the oversight and implementation of a skills-based volunteering engagement.

Evaluating your Project

Measuring project impact and evaluating the volunteer experience enables an organization to not only **improve processes for future engagements, but also provide proof points to demonstrate the value of skills-based volunteering to key stakeholders**. This section contains tools and metrics to support the evaluation of skills-based volunteering efforts.

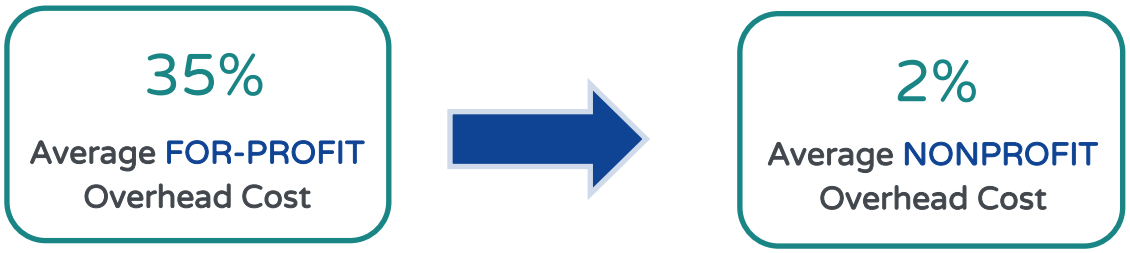
Nonprofit Infrastructure Gap

The Need for & Promise of Skills-Based Volunteering

In order to understand and unlock the promise of skills-based volunteering, it's important to explore the unique challenges that nonprofits face in building and sustaining their organizational infrastructure.

Pressure to Keep Overhead Costs Low

Unlike private sector income which generally comes from client revenue, nonprofit funding typically comes from third parties such as government, donors and foundations. Because supporters often put restrictions on how funds can be used – preferring dollars be spent on programming rather than infrastructure – **nonprofits face pressure to keep overhead costs low**. For-profit companies do not face this pressure and therefore have the freedom to invest in important business-supporting functions such as marketing, finance, human resources and more. While **corporations spend upwards of 35%** of total expenses on operating costs, nonprofits spend significantly less. On average, **nonprofits spend about 2% of their budget** on overhead to support key operating functions[3].



The Impact on Nonprofits

This external pressure to keep overhead costs low combined with staffing constraints that limit infrastructure development (often related) hurts nonprofits. Under-funded overhead typically results in[4]:

[3] Common Impact and Capital One (2012). Redefining the Solution: Doing More with Less. Retrieved from: https://commonimpact.org/pdf/Redefining_Solutions_CI_2.pdf

[4] Masaoka, J. (2015, July 22). How inordinately low overhead hurts nonprofits, foundations, and communities. Retrieved from https://calnonprofits.org/programs/overhead/about-the-nonprofit-overhead-project/how-inordinately-low

- Inadequate and obsolete facilities, equipment and technology
- Under-staffed accounting, HR and administrative offices, resulting in reduced ability to deliver programs, manage funds, raise other funds and document results
- Lack of continuing education and training for staff, resulting in higher turnover and lower quality of services
- Ill-advised decisions

Limited Functional Expertise on Staff

Because of their constraints on fully investing in staffing needs, nonprofit employees often wear many "hats" and support multiple functional areas. At times, this means that a nonprofit staff member may not have specialized training in functional areas that are critical to infrastructure, such as website development, financial modeling, or client relations management. These are areas in which some corporations have entire teams or departments devoted to, with employees receiving customized training to build their expertise and skills. Conversely **most nonprofits rely on untrained employees (41%), consultants (25%), or volunteers and board members (19%)** to staff these functions.[5]

Skills-Based Volunteering is a Solution

By leveraging professional skills such as marketing, human resources or technology in addition to their time, a volunteer can exponentially increase the impact made on the community and address the nonprofit infrastructure gap. In fact, the value of a skilled volunteer hour **is over 7 times the value of a traditional volunteer hour**.[6]

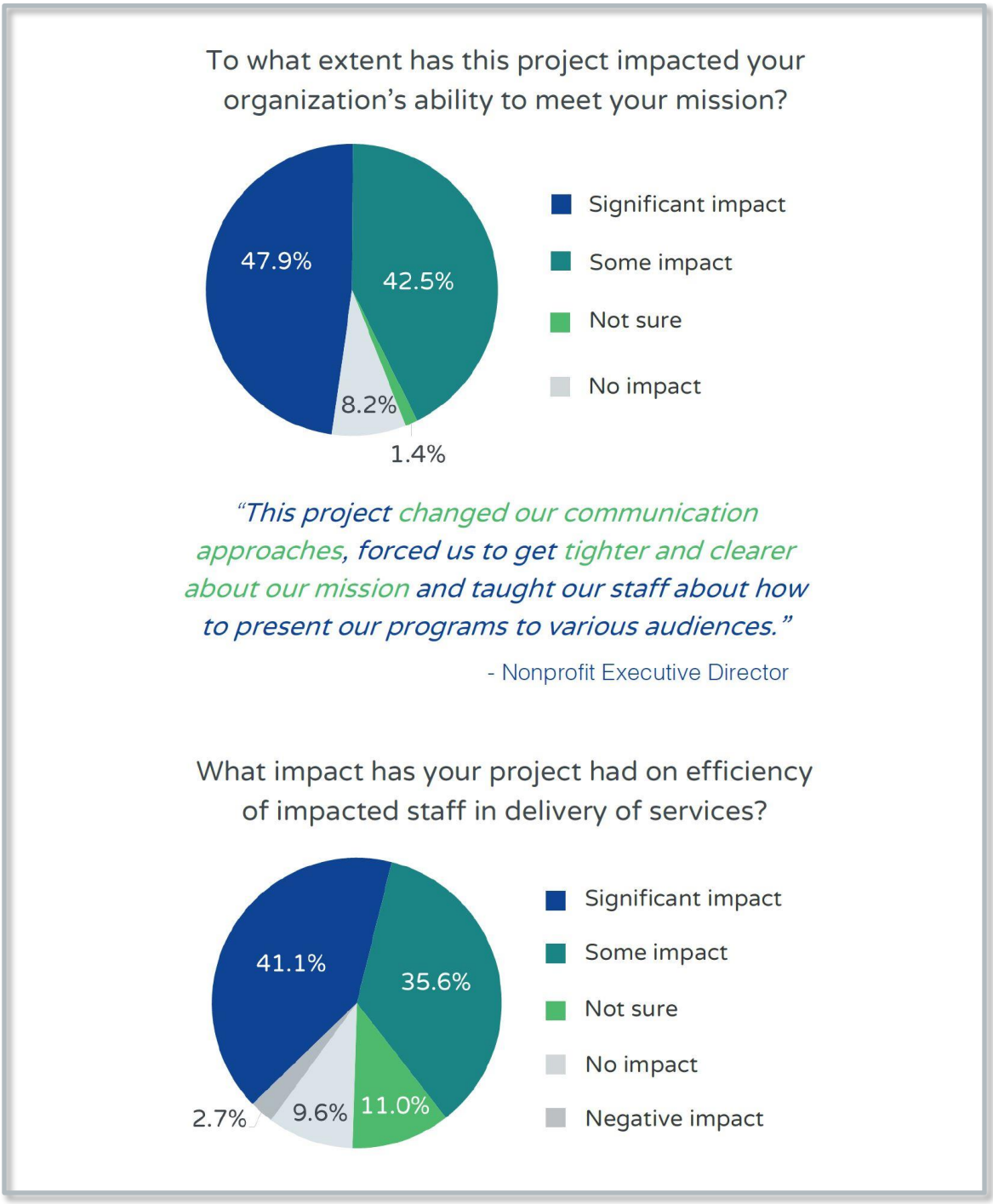
Volunteers with specific skillsets, such as website coding, survey development and graphic design can provide tangible impact for nonprofits in the same way that grants or other forms of support can. Nonprofits may always experience infrastructure funding challenges, but by harnessing the power of skilled volunteers into well-planned projects that address organizational needs, organizations become stronger.

> *"The capabilities of our workforce are our* ***largest untapped philanthropic asset****. This has the potential to be as* ***powerful a force as financial and philanthropic investment*** *if we see widespread adoption."*
>
> *– Danielle Holly*
> *CEO, Common Impact*

[5] Common Impact. (2007). *Assessing the problem: Underinvestment in organizational infrastructure.* Retrieved from: https://commonimpact.org/pdf/Assessing_the_problem_report_1.pdf
[6] Independent Sector. (2018, April 19). Value of Volunteer Time. Retrieved from https://www.independentsector.org/volunteer_time

Impact by the Numbers

The impact of skills-based volunteering on nonprofits is undeniable. In a recent longitudinal study by Common Impact (see Appendix A for "Skills-Based Volunteering: The Long-Term Outcomes"), over 90% of nonprofits reported that their SBV project positively impacted their ability to meet their mission and over 76% saw increased staff efficiency.



"This project changed our communication approaches, forced us to get tighter and clearer about our mission and taught our staff about how to present our programs to various audiences."

- Nonprofit Executive Director

CityLink Center

Impact in Action – A Case Study[7]

CityLink Center, a nonprofit based in Cincinnati, OH, provides integrated services and training opportunities to help families and individuals break free from poverty. They provide a holistic approach to meeting needs and offer programs in critical areas such as education, childcare, transportation, employment and more.

The Need

CityLink was interested in expanding their job training and placement services by providing new avenues for hard-skills training programs that propel clients toward living wage jobs, but they were unsure where to focus. They needed additional support and expertise to assess which industries and partners would require an influx of new talent, identify leads for partnership and make recommendations for incorporating the programming into their existing portfolio.

The Project

Beginning in April of 2018 a team of 10 Fidelity employees worked to identify local industries that would benefit from professionals with hard-skills training. After identifying industries ripe for exploration, the team conducted an in-depth analysis of potential partners that CityLink could work with to make these hard-skills trainings a reality. The team delivered the industry and partnership recommendations along with a roadmap and a set of tools that CityLink could use to inform partnership conversations and enable efficient, data-driven growth.

Overall the team spent over 1,000 hours, meeting with local industry leaders, conducting market research on job trends data and hard-skills training and offering business planning considerations. In the end, the Fidelity team was able to narrow their focus to three high-potential career pathway opportunities: Cable Pulling Technician, Construction and Salesforce Administrator.

The Impact

Implementation of the volunteer team's recommendations began quickly. Executive Director, Johnmark Oudersluys shared, "*It has gone from insights the team has delivered to actual programmatic implementation in a very short period of time, and we are anticipating that between these two programs, we will see upwards of 120 to 140 people go through industry training in the next year, which is just really incredible*."

[7] Walter, M. (2019, February 27). CityLink & Fidelity Investments Partner to Propel Cincinnati Workers into Living Wage Jobs. Retrieved from https://commonimpact.org/blog/post/citylink-fidelity-investments-partner-to-propel-cincinnati-workers-into-liv

Organizational Readiness for Skills-Based Volunteering

In This Section

The Need for Skills-Based Volunteering

Overview of the nonprofit infrastructure gap and the role that SBV can play in closing it

Key Steps & Processes

High-level snapshot of the phases of a successful SBV engagement from organizational assessment to project evaluation

Organizational Readiness Wizard

List of criteria to determine if your organization is ready to engage in SBV and resources to get you there

Organizational Readiness

Skills-based volunteers can make a significant impact on a nonprofit from streamlining communications to developing a more efficient evaluation strategy. However, it's important to assess if your organization is truly ready to engage with skilled volunteers and implement recommendations and practices. The factors listed below are helpful in considering if your nonprofit is at the right point in its lifecycle for skills-based volunteering.

Strong Executive Leadership

- Conveys a strong social vision, energizes and listens to stakeholders, leverages opportunities to innovate and meet changing client needs, and is open to constructive critical feedback and new ideas.

Pontential to Create Deep Social Impact

- Takes a compelling vision, breaks it into programs that work, and measures and hones the model over time to achieve the mission.

Effective Relationship Building

- Leverages external resources, engages people with different points of view, solicits feedback, and sustains long-standing partnerships.

Organizational Stability

- Solid financial and operational footing, with no significant management, staff or board turnover in the last few years.

Commitment to Capacity Building

- Senior leadership has shown a willingness to devote time and resources to capacity building functions.

Strategic Volunteer Engagement

- Connects the work of volunteers to the organization's ability to strengthen its foundation for greater sustainability.

Nonprofits can access an online interactive readiness assessment to understand strength and growth areas. Don't be discouraged by your areas for growth – there are many resources to help increase readiness so that you can maximize the impact of SBV for your organization.

Resources to Improve Organizational Readiness

While the factors related to organizational readiness are used to assess whether a nonprofit is at a good point in time to engage in SBV, they can also be utilized as factors in which to strive for on an ongoing basis. Improving an organization's infrastructure is always a worthwhile effort. Below are resources that can support an organization in improving their readiness in the various factors listed, and are great resources in general for any organization that seeks to have a strong foundation and infrastructure.

Criteria Area	Resources
Strong Executive Leadership	BoardSource - an extensive array of resources to support nonprofit governance and leadership. Begin with fundamental topics like The Board-Staff Partnership, Roles & Responsibilities, and Culture & Dynamics Compass Points of View - newsletters, research, blogs, and articles that report on leadership trends in the field and includes actionable tools and resources
Create Deep Social Impact	The Bridgespan Group's Strategic Planning resources - a starting place for strengthening your organization's strategic vision; check out their guide on Living Into Your Strategic Plan Data workbook from NTEN - a set of worksheets to guide thinking and planning around more effective data utilization strategies
Effective Relationship Building	8 Ways to Build Collaborative Teams - an article from Harvard Business Review Measure Impact for Different Stakeholders - a tool that breaks down stakeholder objectives so your organization can gather feedback from partners and identify opportunities for growth and improvement
Organizational Stability	Nonprofit Risk Management Center's collection of free articles - tools and recommendations around a number of organizational risk topics Nonprofit Finance Fund - a collection of free resources on developing robust financial health and risk mitigation strategies
Commitment to Capacity Building	Redefining the Solution: Doing More with Less - a report by Common Impact and Capital One on the nonprofit capacity gap and key solutions Council of Nonprofits curated list of capacity building definitions, factors, resources from industry experts.

Project Scoping

In This Section

Project Scoping Tips

Tips for narrowing in on a project that meets an organizational need and questions to explore in project planning

Project Description Template

Helpful format and instructions for documenting project needs, goals, and key milestones

Project Readiness Factors

List of factors and criteria to determine if a project is ready for SBV and set up for success

Project Scoping Overview

Project Scoping

Also referred to as project planning, **scoping a skills-based volunteering project refers to the process of translating an organizational need into a specific skills-based volunteering engagement**. Projects should be narrow in focus, with a clearly defined deliverable, and a clear start and end date. Often a highly complex challenge can be broken down into stages or specific needs, and one or more of those needs can be translated into skills-based volunteer engagements. In many cases, an organizational challenge can be multi-faceted, with many related needs – requiring a nonprofit to prioritize a specific need or assess which need is the best fit for a skills-based volunteering project. It's important to invest time into shaping your project before diving into an engagement. You can also consider reviewing sample projects to see the types of challenges and projects that lend themselves well to skills-based volunteering, and common engagement models to help define the ideal time length for your project.

Project Scope Example

An organization that provides after-school education launched three years ago. Initially supported by grant money, they sought to diversify their funding. The **nonprofit recognized a need to bring in more individual donors**. It frequently connected with members of the community who were excited about its mission, but **had no system in place for staying in contact with these potential donors**. The nonprofit recognized **it could do a better job of converting those connections into donations if they had a technology system**, such as a donor database, in place to track contacts, connections, and donations. Unsure where to start in researching donor databases, **the organization sought to engage skilled volunteers in a vendor selection project**. Volunteers would support their organization by utilizing technology and business analysis skills to research and recommend the right technology solution for their organization.

Scoping Tips

Skills-based engagements should focus on addressing a specific an organizational need or capacity challenge. It can be difficult to translate a specific challenge into a project. To start, explore these questions:

- ✓ What are your organizational goals?

- ✓ What are some specific challenges you're experiencing in meeting those goals?
- ✓ Why are you experiencing this challenge?
    - Are you missing a specific tool, process, resource, or technology?
- ✓ How would addressing this challenge increase staff capacity to execute?

- ✓ Would a project addressing this need have a sufficient level of buy-in from executive management and the board of directors?
    - Does senior management recognize the importance of the challenge being experienced and its role in meeting organizational goals?
    - Is senior management willing to invest resources (such as funding or staff capacity into meeting this need?)

Hands-On Example

Let's break it down to see how these questions are addressed in the example above.

- ✓ **Start with organizational goals**
  The nonprofit had an organizational goal to increase donations from individuals.

- ✓ **Within these goals, what is a need that is integral to your day-to-day work?**
  They were missing a system or process for staying in contact with potential donors.

- ✓ **Would a project within this need increase staff capacity to execute?**
  Yes. A technology system would give staff the ability to stay in touch with donors and track specific activities.

- ✓ **What is challenging about meeting this need?**
  The staff was unsure how to go about researching a potential technology solution.

- ✓ **What resource(s) do you need to solve the challenge?**
  A list of functional needs for a database and expertise in comparing and selecting databases.

- ✓ **Would this need have a sufficient level of buy-in from executive management and the board of directors?**
  Yes. Senior leadership recognized this as a priority, understood how the project would improve staff's ability to increase individual donations, and was willing to invest resources towards a new database.

Project Description

Once you have a project identified, it's important to develop a project description. Executing this process will not only help in communicating your need to potential volunteers, it will also support you internally by further clarifying your needs and goals for the project. A

recommended structure for a project description includes an overview of your organization and specific challenge, expected deliverable or result, estimated stages and accompanying timeframe and skills needed.

When drafting a project description, ensure that you're using general language that can be understood by potential volunteers outside your organization. Avoid industry lingo and clarify specific terms that you may utilize in your work.

Project Description Template

Project Goals
[A high level overview of the nonprofit and 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.]

- [Discovery where a volunteer(s) develops an understanding of your nonprofit's work, your current state and future goals around the particular project area]
- [Additional milestones to bring the volunteer(s) from discovery to development of the final deliverable]
- [Write out final milestone, stating the final deliverable]

Skills Needed: [Inserts skills needed]

Project Description Example

Project Goals
Nonprofit provides fitness opportunities. Since 2002, the organization's fitness center has served over 20,000 women and children. As programming grows, they recognize a need to attract and retain funders through more intentional outreach and engagement. While they have a compelling mission, a demonstrated community impact, and inspirational personal stories, they do not have any quality marketing materials. They recognize a need to develop a standardized messaging template incorporating key metrics and testimonials from clients. However, the organization does not have the marketing expertise in-house to develop this template. They seek a team's assistance to fine-tune existing messaging and develop a

standardized template that can be easily updated and shared with supporters and potential funders on a regular basis. This marketing resource will allow the nonprofit to connect with new audiences in a more efficient and effective manner.

Project Description

A team of employees will review nonprofit's existing metrics and messaging, curate and confirm key messages, and develop a standardized communications template that can be regularly updated by the organization's staff and shared with prospective and current funders.

Project Phases/Milestones

- Develop an understanding of nonprofit's mission and programming. Assess any existing messaging and programmatic data, including recent grant applications. Identify goals and requirements for a messaging template and with input from nonprofit, agree upon the platform or framework for the template.
- If necessary, update existing messaging, and using the previously agreed upon framework or platform, create a standardized template incorporating testimonials and data that can be updated by nonprofit staff.
- Guide nonprofit staff through the process of updating the messaging template and document the steps taken for future reference by nonprofit.

Skills Needed: Project Management, Copy-writing, Graphic Design, General Marketing & Communications, Content Development, Audience/Message Segmentation

Additional Tools and Resources

For more detailed instruction on how to translate organizational needs into a project description, visit the Capacity Commons interactive Project Scoping Tool and utilize the Common Impact Project Scoping Template (see Appendix B for template).

Project Readiness Factors

Similar to organizational readiness, there are certain factors that make for a "ready" skills-based volunteering project. The factors in the chart below and the questions in the online project readiness wizard will help you assess whether the project you scoped is ready to take on skilled volunteers and if not, will provide the resources you'll need to get there.

Defined Project Goals

- Clear understanding of how the project will feed into 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

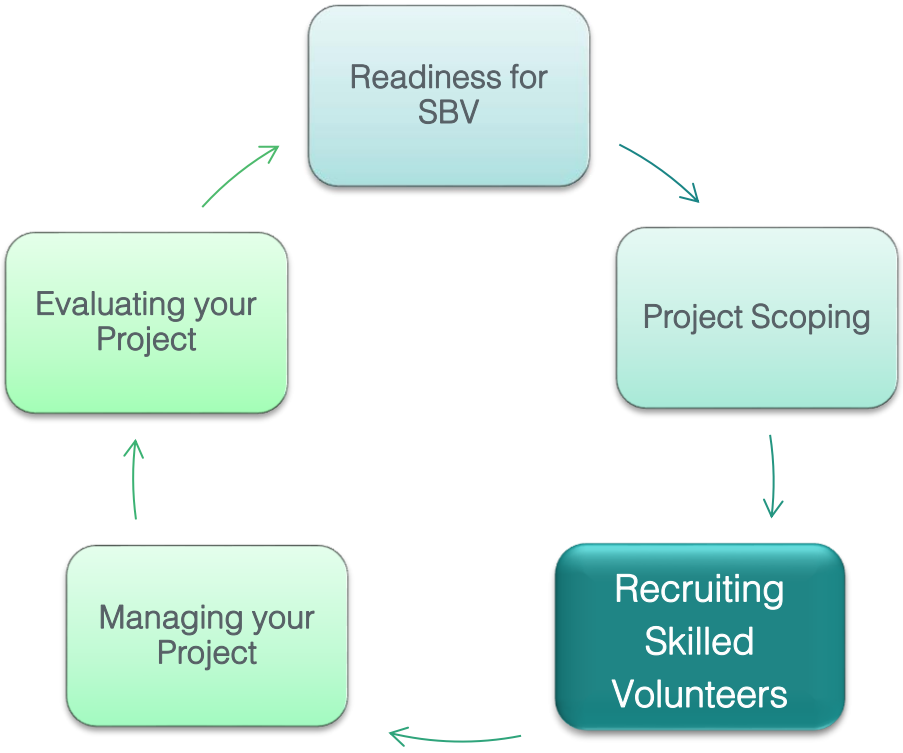
- Identification of a project lead who has the capacity to support the volunteer(s), a deep understanding of the challenge the project addresses, and the ability to make decisions autonomously.

Post Project Support Plan

- Commitment to obtaining the resources to sustain the project work and implement solutions or recommendations.

Again, do not be discouraged by your areas for project growth! Identifying these areas for improvement before embarking on your engagement will maximize both the short and long-term impact of the project.

Volunteer Recruitment



In This Section

Developing a Corporate Pitch

Resources for translating a project description into a compelling request for support of corporate volunteers

Corporate Relationship Development

Guidance on how to identify potential corporate partners and to begin the process of developing mutually beneficial relationships

Volunteer Recruitment Resources

Lists and descriptions of common places to find pools of skilled volunteers to tackle your project

Volunteer Recruitment

Developing a Corporate Pitch

Recruiting your skills-based volunteers should be taken as seriously as recruiting your staff! Now that you have a defined project scope, it is time to craft a job description that clearly outlines what you need and expect from your skills-based volunteer(s) so that you attract the people with the right skills and approach for your organization.

Functional Skills	What specific functional skills will the volunteer need to meet your project needs? If you don't know the name of the skill, i.e. "database architect," describe what you need them to do on the project.
	Do you think you need an expert, someone who is proficient or someone who is willing to learn while doing? Define for each skill.
Soft Skills	What are the soft skills the skilled volunteer will need to have to be successful (i.e. influential presentation skills, ability to navigate difficult conversations, creative problem solving, etc.)?
Background & Experience	Are there specific experiences that would be helpful for the skilled volunteer to have (i.e. exposure to a specific technology or platform, experience managing remote teams, etc.)?
Craft the Job Description	Pull the above requirements together in a job description you could use to identify qualified skills-based volunteers

For more detailed step-by-step instruction in developing a corporate pitch, view the corporate pitch worksheet on p. 7-9 of Common Impact's Recruiting Skills-Based Volunteers resource (See Appendix C for "Developing Your Corporate Pitch").

Approaching Corporate Volunteers – Relationship Development

If your organization has strong existing relationships with corporate partners, your next step is approaching those partners with your corporate pitch. (Be sure to use the corporate pitch worksheet in Appendix C to craft your ask!) If your organization is new to corporate engagement or you don't have any close partnerships, **it's important to start with simple relationship development** before approaching a company with a request for skills-based volunteering support. The information below includes tips for identifying potential partners, initial communications, and making an ask for support.

Mission Alignment

The most important piece to think about in developing a corporate relationship is to identify the ways in which **the mission of your organization aligns with the company you are approaching**. Most companies publish information about their charitable giving and employee engagement priorities on their websites. Reviewing that information and referencing it in your communication shows your potential corporate partner you are invested in creating a mutually beneficial partnership. Remember, companies have goals and objectives related to engaging employees as volunteers and making a community impact. **You can be a partner in helping them to meet these goals!**

What are Companies Looking For?

It's exciting to note that the skilled volunteer supply in the corporate sector is growing. **Over four million professionals on LinkedIn have expressed interest in joining a nonprofit board or doing skills-based volunteering**, and more and more companies are integrating formal SBV programs into their employee engagement initiatives. In fact, more than 50% of companies report engaging their employees in skilled service.[8] The reason for this growing supply is that SBV not only supports the community and nonprofit organizations, it is also **incredibly beneficial for companies and their employees**. Companies want to take part in skills-based volunteering to attract, retain and develop their employees. For employees, engaging in these types of projects can be an incredible learning opportunity where they develop not only their hard, functional skills, but also soft skills such as client focus, navigating ambiguity, creative thinking and problem solving. Skilled volunteers also learn from the nonprofit professionals they work with on a project, having the opportunity to see them regularly wear multiple hats and create solutions to societal challenges with very limited resources.

> *"We had the opportunity to **think holistically about a business through all of their functions**. We don't get to do that at our company, because we have 50,000 employees." - Corporate Volunteer*

Making the Ask

When approaching a company, it's important to consider and communicate the ways your organization will serve as a strong nonprofit partner:

- ✓ Describe how your mission is aligned with the company's business model/industry
- ✓ Outline multiple entry points to involvement with your organization such as traditional volunteering, board service, special events and of course, skills based volunteering
- ✓ Share examples of existing meaningful volunteerism initiatives
- ✓ Offer to develop a sustainable partnership that will benefit the company and your mission for years to come
- ✓ Express gratitude for the opportunity to connect with talented employees
- ✓ Utilize important documents like the volunteer project description and corporate pitch to clearly communicate your needs

[8] CECP. GIVING IN NUMBERS. Retrieved from https://cecp.co/home/resources/giving-in-numbers/

How to Leverage Existing Relationships

When thinking about companies to approach, a good place to start is with your board. Ask board members to write down their strongest corporate contacts. Who are they comfortable approaching? Ask them to invite their network in to experience an existing volunteer opportunity at your organization.

Here is a suggested message you may send to your board:

As we work to open doors for corporate partnerships, we welcome your suggestions for local companies and key leaders to connect with. We have included a list of companies we think may be a good fit with us and our mission.

If you have any appropriate, high-level contacts at a local company, please feel free to send them to the team. If this list prompts other ideas for corporate contacts in your network, we'd love to hear them!

For more on how to craft your ask and partnership, view Common Impact's blog post "What You Need to Know to Make the Most of Corporate Pro Bono Opportunities at Your Nonprofit."

Additional Recruitment Resources and Sources

Source Category	Description
Professional Services Firms	Companies that provide consultative services as their business such as design firms, law firms, management consulting firms, etc.
Corporations	Companies that have an existing employee engagement or skills-based program that can help execute projects at your organization.
Individuals	Existing volunteers or stakeholders who have a set of functional skills that can be leveraged for a specific project or need.
Intermediaries	Organizations that serve as volunteer connectors, matching volunteers with nonprofit needs such as Points of Light or United Way organizations. (Common skills-based intermediaries include Common Impact, Taproot Foundation, Catchafire)
Professional Schools	Business (MBA), IT and design schools that offer internships for their students or integrate skills-based consulting into their coursework.
Professional Associations	National organizations with local and regional members who can be tapped for lists of members in specific areas of expertise. For example, associations for human resources professionals, design associations, bar associations, etc.
Volunteer Matching Technologies	Websites that include a searchable database for volunteering opportunities such as Capacity Commons, Taproot+, Catchafire or LinkedIn.

Navigating Corporate Relationships

Power dynamics exist in every relationship, but are particularly pronounced in collaborations that include an exchange from one party to another—of resources, services, or ideas. Such dynamics often color corporate-nonprofit relationships, driving nonprofits to shapeshift in order to match the priorities of their funders or corporate partners. While it's important to acknowledge these dynamics, they don't have to dictate the norms of your skills-based engagement! Here are a few tips to help you to advocate for your needs and create mutually beneficial cross-sector partnerships.

Don't be afraid to say no

- Before you embark on an engagement, make sure the resource aligns with your needs and goals. Don't be afraid to say no if a company comes to you with a project that is not the right fit.
- If this isn't the right time for SBV, that's okay! Provide your partners with clear reasons why this isn't the right project at this time. Proactively ask (and tell!) them how they can best support your organization.

Create a culture of trust and open communication

- While your volunteers may be subject matter experts, you're the expert on your organization. Be upfront about your operating environment, trust in the expertise of your volunteers and approach the partnership with an open mind!

Direct the services to where you need them the most

- SBV is designed to address the core areas of a nonprofit's business that are traditionally under-resourced and under-funded. Be honest and direct about where volunteers can best plug in.
- Pro tip: don't forget to do your research to understand what unique talents, knowledge and experiences your partner can offer!

Feedback, feedback, feedback!

- Set the tone at the beginning of your project with regards to how valuable feedback is. If you expect to receive it and intentionally create space for it as part of the process, then it will feel less personal and more reciprocal.
- It can help to think of yourself as a client receiving a service. Feedback is not only welcome, but necessary to move the project forward!

Encourage your partners to be committed beyond the project

- Consider skills-based volunteering as a potential gateway to a longer-term relationship. Actively brainstorm with your volunteers how to grow and develop the partnership over time.

Project Management

In This Section

Project Structure
Overview of the key components of the project process

Project Requirements Development
Overview of vital documentation and links to step by step development guides

Project Management Best Practices
Tips for overseeing and executing a project through the key phases and common challenges

Project Management Overview

Now that you have scoped your project and secured volunteers, the next step is to **prepare to manage the project**. Since these engagements are tackling core challenges your organization is facing, skills-based project management often requires a deeper level of communication and trust development with the volunteers than typical hands-on volunteer work. Follow the steps below to lay the foundation for your project so that your organization and volunteers are set up for success!

Suggested Project Structure

Project Leadership

- ✓ Identify one member on your team to be the point person for the volunteer(s)
  - Check out the Nonprofit Project Leader Description (see Appendix D for details) to understand who on your staff would be the best fit for this role
- ✓ If you are working with a volunteer team, identify a team lead or project manager who will be your main point of contact and lead the team through the engagement

Communication Schedule

- ✓ Hold 30-60 minute weekly meetings between the team and the nonprofit lead. Iterative communication is crucial to ensure that all parties are on the same page and to provide your nonprofit a chance to reinforce your vision and goals for the project.

Requirements Development

- ✓ Develop a project requirements document (see Appendix E for a template) that dissects your project goal into project phases and milestone meetings

1. Kick-off meeting (See Appendix F for a sample agenda)
   a. Schedule a kick-off meeting at the beginning of the project to ensure the volunteer(s) and your staff are on the same page about what success looks like. At the meeting, be sure to cover:
      i. Goals for the project
      ii. Previous work that's been completed to tackle your project need
      iii. The realities of your organization's environment (e.g. are there any resource such as budget or time constraints that the team should take into account when developing the solution?)

2. Milestone Meetings
    a. Use milestone meetings as a chance for your nonprofit to formally provide the volunteer(s) with feedback on draft deliverables throughout the project
    b. These formal feedback meetings will ensure your vision and operating realities are incorporated into the final deliverable
3. Project Wrap Meeting (See Appendix G for a sample agenda)
    a. The purpose of the project wrap meeting is to provide space to celebrate the project and to bring closure to the volunteers' work by having them present the project process and final deliverable
    b. Consider inviting important stakeholders (board members, staff, etc.) to this meeting to share the project deliverable and communicate its value

Project Management Best Practices

Dedicate time to review the work you receive

- ✓ Schedule milestone meetings as formal points of feedback to ensure the project is progressing successfully and to provide your volunteer(s) with thoughtful, candid feedback

Involve all relevant staff

- ✓ Elicit staff feedback to confirm project needs and build employee buy-in

Be flexible

- ✓ Work with your volunteers' schedules and be prepared to make yourself available to them during business and non-business hours

Be open and responsive

- ✓ This is your vision – the volunteer(s) cannot build a great project for you without your input! Tell them when something is working and especially when it isn't.

Meet your deadlines

- ✓ The volunteer(s) often have a finite period to complete the project. Cancellations and missed deadlines can delay your project and risk loss of volunteer support

Foster a connection with your volunteers

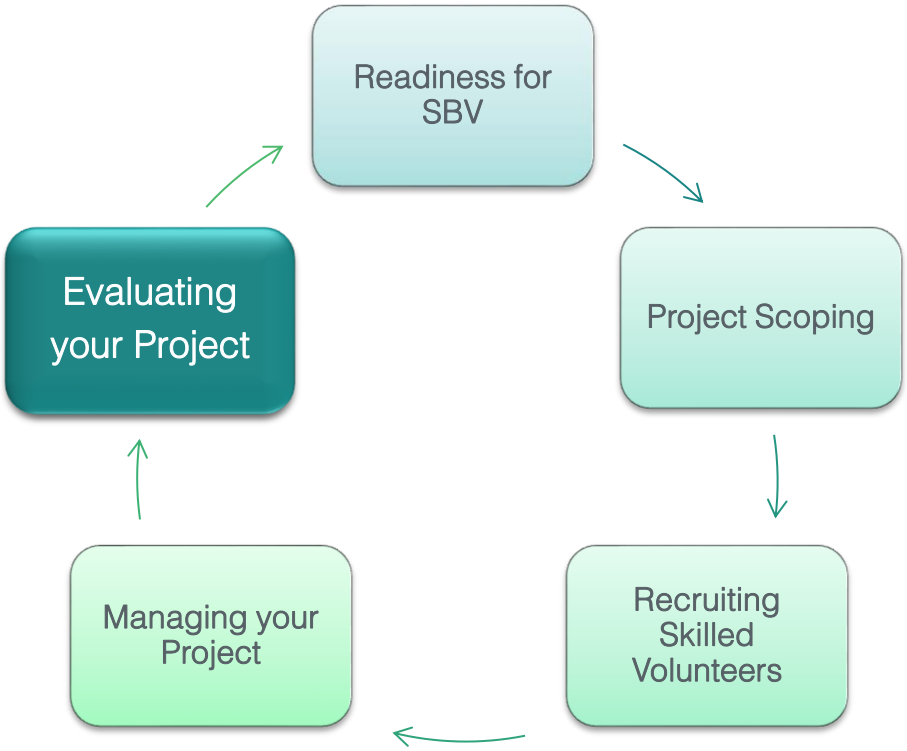
- ✓ Expose your volunteer(s) to your direct service and the outcomes of their work. If they feel a connection to your organization and the population you serve, that will only enhance their experience and the product they produce

- ✓ Skilled volunteers have major potential to continue to be involved with your organization on an individual basis (skilled volunteering, direct service, donations, referrals to other organizations/professionals)

Recognize and thank your volunteer(s)

- ✓ Expressions of gratitude and recognition of their efforts will go a long way toward relationship-building
- ✓ Consider buying food if a meeting happens over lunch

Project Evaluation



In This Section

Evaluation Needs

Overview of the common motivations for evaluation and accompanying information needs for nonprofits, companies, and volunteers

Quantifying Project Value

Interactive tools for assessing the organizational value of the SBV engagement for an organization

Project Surveys

Templates to develop surveys to assess the experience of volunteers and guide internal reflection

Project Evaluation

Now that you have completed your project, it is time to dive into evaluation! The different stakeholders involved in your project will have different needs and motivations for completing evaluation. Considering these diverse needs will support your organization in developing effective tools and metrics to successfully evaluate your skills-based volunteer project – and replicate it in the future!

Nonprofits

- Gauge impact on operational effectiveness
- Build case for future capacity investments
- Disseminate impact data to key constituents

Companies

- Assess grant dollars leveraged
- Appraise nonprofit effectiveness
- Determine impact on employee recruitment & retention
- Measure social return on investment (SROI)

Volunteers

- Identify professional development opportunities
- Measure community engagement impact from investment

Quantify the Value of the Project

It can be challenging to quantify the specific value of a project or to isolate the discrete impact of skills-based intervention; however, it's important to estimate the impact of the engagement. While the calculation looks different for every organization, the following worksheet breaks down the various pieces of value and investments related to skills-based volunteering. This is a great place to get started in understanding the full impact of your project. Make sure to download the plug and play calculator for a step-by-step tool that will help you fully quantify your project's value.

Organizational Value

Market value of deliverable: _____
Either the listed value of the project (e.g. an out-of-the-box website from a traditional vendor is $20k) or the going rate for a consultant in your region times the estimated project lift (e.g. $150/hour for a web consultant x 100 hours)

Long-term value: _____
What would be lost if this project did not exist? (e.g. savings from discontinued vendors and associated fees, donor dollars earned from improved site enable expanded reach to X number of new constituents, etc.)

Long-term value unique to this engagement: _____
The long-term value that your organization will only recognize through this project, as opposed to an outside contractor or internal development, such as new or strengthened relationships with skills-based volunteers and/or companies (input average value of a first year of partnership with a *company and/or corporate individuals)*

Unquantifiable value: _____
Business considerations that you are unable to quantify monetarily, but rather have a long-term value for your organization (e.g. improved organizational culture and morale after a project is successfully completed and the results are celebrated)

TOTAL:

Organizational Investment

Cost of staff time to manage engagement: _____
Monetary value of staff member(s) hour x anticipated time commitment

Opportunity Cost of Implementation_____
The value of the initiatives that you could have otherwise pursued with the resources devoted to this project (e.g. program director unable to launch a new initiative due to dedicating time towards website project)

Implementation and Maintenance _____
Additional budget required to implement and maintain deliverable (e.g. website hosting fees, staff time consumed with training on updating new website, etc.)

TOTAL: _____

NET TOTAL (Total Value – Total Investment):

_____

Questions to consider when communicating the value (costs and benefits) of engaging in skills-based volunteering:

- Do you need this project addressed immediately? What would be the results of a potentially protracted timeline?
- Is there a particular volunteer or corporate partner that you are looking to deepen your relationship with? How could this volunteer engagement produce that deeper relationship and heightened engagement? What would this do for your organization?
- What skillsets are you seeking to develop in your staff? Particular functional skills (database management, communications, budgeting)? Project management?
- How will this project enable you to better achieve your mission?

Evaluation

Measuring project impact and evaluating the volunteers' experience not only enables your organization to improve processes for future engagements, it also provides you with the proof points to demonstrate the value of skills-based volunteering to key stakeholders.

The scope of your evaluation can range from small to complex, depending on what's feasible for your organization. To measure impact effectively, evaluations should be performed accurately and consistently over an extended period of time.

Evaluating the success of your project over the short, medium and long-term will allow you to gauge and communicate the project's impact on your organizational capacity and, ultimately, in meeting your mission.

Use the Project Evaluation Template (see Appendix H for this tool) to guide the development of evaluation questions and processes.

Appendices

Appendix A

Skills-Based Volunteering: The Long-Term Outcomes

Nonprofit Impact

29% of respondents said they **secured funds or received financial investment** due to their SBV project or its impact

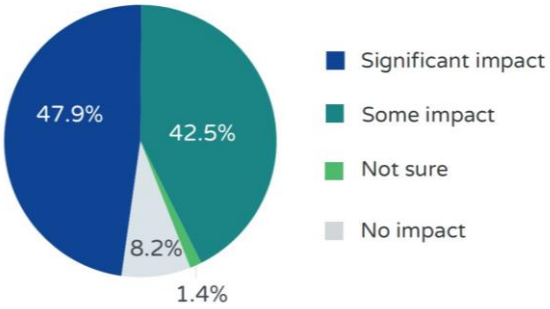
43% of respondents said they have been able to reduce **operational** expenses post project

35% of respondents said they have been able to reduce **programmatic** expenses post project

"As a result of the project, we had an increase of 6% in donor retention and an increase of 13% individual contributions, representing an additional revenue of $10,750."

- Nonprofit Development Coordinator

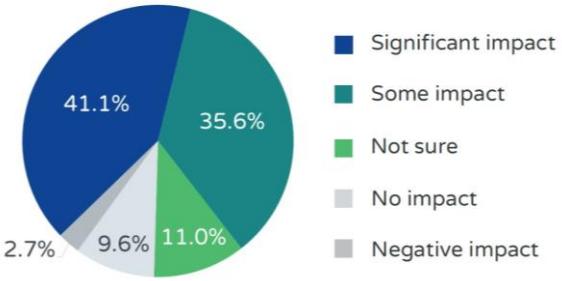
To what extent has this project impacted your organization's ability to meet your mission?



"This project changed our communication approaches, forced us to get tighter and clearer about our mission and taught our staff about how to present our programs to various audiences."

- Nonprofit Executive Director

What impact has your project had on efficiency of impacted staff in delivery of services?

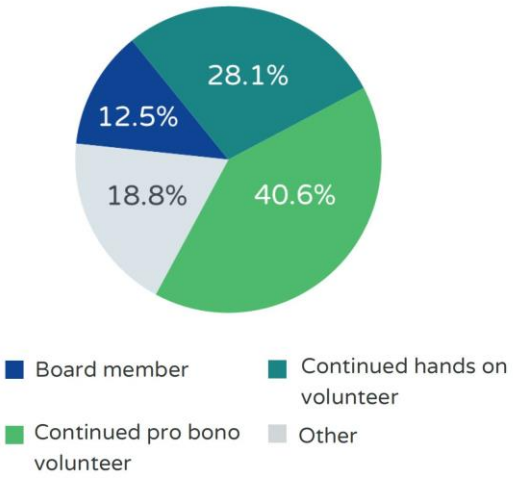


Volunteer Impact

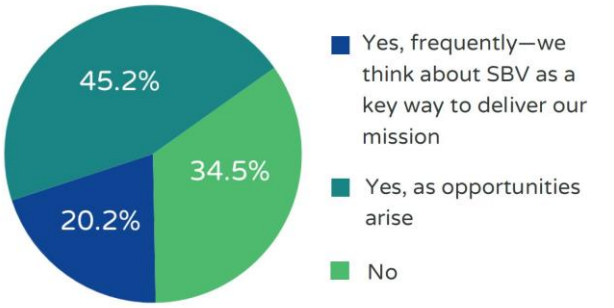
82% of respondents said their Common Impact projects **better equipped them to work with skills-based volunteers** post project

41% of respondents **continued the relationship** with their volunteers post project.

...of that 41%:



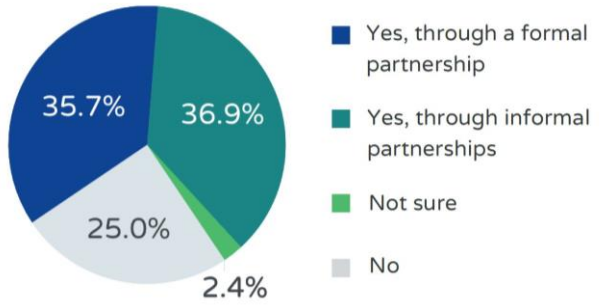
Have you continued to use SBV to build the capacity of your organization?



"This experience has opened up ideas for us to engage in more skills-based volunteering opportunities that we hadn't considered before."

- Nonprofit Executive Director

Did your organization continue its relationship with the company for which your SBV volunteers worked?



Top Nonprofit Barriers to SBV

1. **Lack of support or resources to implement or maintain the final product**
2. Lack of understanding of overall value
3. Lack of understanding of time commitment

About the Study:

Skills-based volunteering (SBV) is rapidly growing in popularity, **with more than 50% of companies engaging their employees in skilled service**. Still, the model is new to nonprofits and many have struggled to understand the long term impact it will have on their ability to deliver on their mission.

Common Impact embarked on the study to quantify the longitudinal impact of SBV on the social sector and heard first-hand the stories of **transformations SBV has had on our nonprofit partners.** We reached out to **over 400 nonprofits across 21 cities and across various mission areas who have all participated in one or more projects with Common Impact**. The results represent two decades of data that demonstrates the immediate, positive outcomes of these engagements on the social sector, including:

- ⇒ Ability to better serve current constituents
- ⇒ Ability to expand services and serve additional constituents
- ⇒ Ability to adapt to meet evolving or new social challenges
- ⇒ The value of the long term relationships with volunteers and companies they represent

Appendix B

Project Scoping Template

Organization Name:	
Organization Mission:	
Strategic Organizational Goals	
1.	2.
3.	4.
Project Identification	
Of your organizational goals over the next year, which goal is a priority for a skilled volunteer project?	
If achieved, how will this goal help your organization better serve its clients (or meet its mission)?	
What is your organization currently doing to meet this goal?	
In an ideal world, what would you be doing to meet this goal?	
What resource, product, process, capacity, etc. do you need to achieve this goal?	

Project Readiness	
Project Goals ▪ Show the project's role within the overall program or organizational strategy ▪ Goals should be able to be documented ▪ Upon completion, what will your organization be able to do that it isn't able to do now?	
Project Scope ▪ What are the major components and milestones? ▪ What should be achieved at each of these stages? How will success be documented?	
Project Leadership ▪ Who will serve as the "point person"? ▪ Who will be responsible for project implementation? ▪ Who else will need to support this project?	
Post-Project Support Plan ▪ How will you communicate next steps to organization staff? ▪ How will the projects meet organizational goals? Which staff resources will be dedicated to make sure that happens? ▪ Who else should know about the finished project (board members, media, volunteers, etc.) ▪ What financial or other resources are needed to continue the project long-term?	

Appendix C

Developing Your Corporate Pitch

If you have strong corporate partnerships, or are looking to develop one with a company in your area, you can consider "pitching" your initiative or project as one that could be tackled by a team of volunteers. Companies are increasingly excited about engaging their nonprofit partners in skills-based volunteer initiatives because the business value is clear: they have an opportunity to engage and develop their employees while deepening their impact on the organization's with which they partner. Even so, for a company to be interested, you'll want to be able to communicate how SBVs can make an impact on your organization in a clear, compelling way.

What challenge are you trying to solve?	What's the big picture challenge your organization is trying to solve?	
	What are your key barriers to solving that challenge?	
What project will help you solve that challenge?	Describe your skills-based volunteer project in 1-2 sentences.	
	How does your project help you overcome the key barriers to solving the challenge articulated above?	
Think about the corporate partner you want to pitch…	Why does this particular corporate partner bring to the table that others couldn't? Think skill set, cultural competency, regional knowledge, etc.	
	Why is it the right time for this project?	
	How do you envision this supporting other elements of your current partnership with them (should one exist)?	
What's in it for them?	How does this connect to the goals that the company has for its community and employee engagement?	
	What will a company's employees learn from this project? What skills and on-the-ground knowledge will they gain?	
	How will you measure that benefit?	

Craft the pitch Pull the above points together in a 3-4 minute “pitch” that you’d use if you have the opportunity	

Appendix D

Nonprofit Project Leader Description

Before kicking off your project, it is important to identify the person on your staff who will serve as point person for the volunteer(s). You might be inclined to consider the individual on your team who manages traditional volunteer engagements. Keep in mind that pro bono initiatives require a different set of skills than traditional volunteer management, often unique to the project that you're undertaking.

This role is also a great professional development opportunity for a staff member, where he/she could hone project management skills, gain exposure to new sectors, and deepen functional area expertise. Consider if this could be a development opportunity for your staff, and check out what makes for a great nonprofit project lead below!

- Significant exposure to the project focus area (i.e. your technology staff for a database project)
- Ability to quickly respond to ensure project momentum. Hint: Your Executive Director is usually not the best choice for this reason!
- Ability to quickly make or facilitate the decisions necessary within a project to move it forward
- Comfort providing feedback and pushing back if the volunteers are off course on their deliverable
- Adaptability and a cross-sector perspective to help bridge the perspectives of your organization and your volunteers
- A focus on relationship development, and seek to cultivate your skilled volunteers to be engaged with your organization long term
- The trust of your staff to know what's best for your project and your organization. Hint: This is usually not your summer intern!

Appendix E
Project Requirements Template

[Project Title] Project Requirements Document
[Organization Name]

Overview of project

Type of Project: [Project Name]
Est. Time Commitment: [Hours per person per week]
Project Duration: [Time frame]
Project Completion Date:
Location of Client: [Nonprofit Address]
Location of Project Work: (Most work takes place virtually, with occasional meetings in person at the nonprofit)
Nonprofit Lead: [Name Title Phone Email]

Appendices

Appendix A: [Information about your nonprofit (mission, program overview)]

Appendix B: [Project pertinent materials (ex: financial statements for a finance project, marketing collateral for a marketing project)]

Project Description

Project Context

- Brief introduction to your organization and mission
- Why do you need this project?
- What will the outcome be of this project on your org and on your mission?

Project Goals

- Succinct summary of the goal/outcome for this project
- Ex: A team of HR professionals will develop a redesigned performance review process that aligns with the nonprofit's work planning and annual goal-setting processes

Project Summary

- Project description that outlines the support the volunteer(s) will provide to your organization and the deliverable
- Ex: Volunteer(s) will support {nonprofit] in defining its goals for a redesigned performance assessment, suggest a process and portfolio of tools that will achieve those goals, and develop up to 2 key tools outlined

Project Milestones

1. Discovery: Understand [nonprofit] as an organization, confirm pain points and goals for this project, and perform an initial review of [focus area of the project]. Create an initial project plan that maps the team's phases of work against a timeline (e.g. GANTT Chart), to be further refined as project progresses.

- Milestone 1 [target date]: Present initial findings from Discovery, the approach the team will take to achieve the final deliverable and a high-level timeline for the phases of work.

2. [Phase 2 title; ex: HR Assessment or Market Analysis]: [Outline the goal of Phase 2].

- Milestone 2 [target date]: Deliver [Phase 2 deliverable]. Receive feedback from nonprofit.

3. [Phase 3 title; ex: Draft development of performance review process; draft recommendations development]: [Outling the goal of Phase 3].

- Milestone 3 [target date]: Deliver [Phase 3 deliverable]. Receive feedback from Nonprofit.

[Phase 4 title: ex: Process Finalization and Tool Development]: Incorporate feedback from Nonprofit into draft deliverable and [goal of phase 4].

- Milestone 4 [insert date]: Deliver [Phase 4 deliverable].

4. Project Wrap Meeting: Create a 30-45 minute PowerPoint presentation, keeping in mind that some stakeholders may not be familiar with the project process.

- Milestone 5 [insert date]: Present a summary of the project process and final [instert deliverable] developed, hand off the final deliverable, and celebrate the volunteer(s)' hard work with the nonprofit at the project wrap meeting.

Project Deliverables

At the completion of this project, [nonprofit] will have:

List each deliverable in a separate bullet.

Steps to Completion

Over the course of this [insert length] project, the volunteer(s) will be responsible for the following main tasks:

PHASE 1: Kick-Off and Discovery

1. Prior to the kick-off meeting, the volunteer(s) will review the project requirements document and note any questions that arise.
2. Volunteer(s) and [nonprofit] will attend an introductory kick-off meeting as a chance to learn more about [nonprofit] and to begin asking questions about the project. This meeting can take place virtually via an online meeting platform to accommodate nonlocal volunteers. If project volunteers are local this meeting may also take place in person at the nonprofit, provided they are able to accommodate the group. During the kick-off meeting, the volunteer(s) will:
    a. Meet with [nonprofit] to learn more about the organization, and why this project is a priority for them.
    b. Review the requirements document and discuss the project goals and deliverables.
    c. Ask questions to identify information gaps and gather any information needed to begin the project.
    d. Establish a weekly, 30-60-minute check-in call with the nonprofit lead to gather information and feedback, check assumptions, communicate status updates, and answer questions.
    e. e. Set a target date for the discovery findings presentation.
3. Develop a high-level project plan that outlines the phases of the project and work streams involved, mapped against a timeline.
    a. This plan is a starting point, to be expanded and refined as the project progresses. Many teams use a GANTT chart format.
    b. Ask the nonprofit if there are any important dates that will impact the project such as major events that will reduce their capacity, or busy periods when a service interruption should be avoided.

    c. Review the volunteer(s) availability and capacity in the context of work interdependencies to prevent stalls.
    d. Share a copy of the project plan and timeline with the nonprofit lead.
4. Perform an assessment of [project area focus, ex: current performance review process], documenting challenges with the current process and identifying goals for the new [project deliverable].
    a. Interview nonprofit staff to understand the nonprofit's current state and goals for the final deliverable.
    b. Review documentation of the current state that the nonprofit has available for the team.
5. Create a discovery findings document and/or presentation to review with [Nonprofit].
    a. Briefly review the project phases, highlighting the current phase, and the initial project goals and deliverables.
    b. Describe the volunteer(s)' discovery process.
    c. Present the volunteer(s)' findings the discovery process.
    d. If the team is leaning towards any particular recommendations at this point, share a bit of information about those potential recommendations and ask any questions that will help the volunteer refine its direction in preparation for the next phases of the project.

Milestone 1[target date]: Present initial findings from Discovery, the approach the team will take to achieve the final deliverable and a high-level timeline for the phases of work. Receive the nonprofit's feedback and approval on the proposed project plan.

PHASE 2: [Phase 2 title]

1. [Steps the team will take to complete Phase 2]

    Milestone 2 [target date]: Deliver [Phase 2 deliverable]. Receive feedback from nonprofit.

PHASE 3: [Phase 3 title]

1. [Steps the team will take to complete Phase 3]

    Milestone 3 [target date]: Deliver [Phase 3 deliverable]. Receive feedback from nonprofit.

PHASE 4: [Phase 4 title]

1. [Steps the team will take to complete Phase 4}

Milestone 4 [target date]: Deliver [Phase 4 deliverable]. Receive feedback from nonprofit.

PHASE 5: Project Wrap Meeting (see sample agenda)

1. The project wrap meeting is an opportunity for the volunteer(s), the nonprofit, and other stakeholders to celebrate the success of the project. This meeting can take place virtually via an online meeting platform to accommodate non-local volunteers. If project volunteers are local, this meeting may also take place in person at the nonprofit, provided they are able to accommodate.
2. Work with the nonprofit to determine their desired audience and location for the project wrap meeting.
    a. Some nonprofits prefer to invite stakeholders, such as Board members, who were not heavily involved in the project process so they can receive an overview of the project and its outcomes. Other nonprofits prefer to invite only those who were involved in the project.
3. Create a 30-45 minute PowerPoint presentation for key stakeholders, keeping in mind that some stakeholders may not be familiar with the project process. This should include:
    a. Volunteer(s) presents initial project challenge, approach and process
    b. Volunteer(s) highlights key features or points in the deliverable
    c. Volunteer(s) outlines maintenance and any outlying next steps for nonprofit staff

Milestone 5: By [target date], schedule and attend a wrap meeting where the volunteer(s) will:

a. Share the end-of-project presentation with key stakeholders.
b. Answer any remaining questions about the project process and final deliverables.
c. Celebrate the volunteer(s)' hard work and accomplishments!

EVALUATION

1. Fill out [Nonprofit's] feedback survey to provide reflections on your volunteer experience, process, and any personal learnings.
2. Please report final volunteer hours to [Nonprofit].

Appendix A: Nonprofit Information

Organization Name:
Address:
Contacts:
Primary Contact:
Mission: Programs:

Appendix B: Project Specific Information

Appendix F

Sample Kick-Off Meeting Agenda

Project Kick-Off Agenda: [Project Title]

Date, Time, Location (or online log-in)

Meeting Purpose:

The purpose of this meeting is for Nonprofit to meet the volunteer(s) to discuss the requirements for the project and to provide enough information for the volunteer(s) to begin their work.

Meeting Agenda

1. **Welcome and Introductions** *15 min*
    a. Project team members from Corporate Partner introduce themselves
        i. Describe current role and relevant past experience
        ii. If you are working with more than one volunteer - Define role on this project (project lead, developer, etc.)
        iii. What is personally interesting to you about this project?
    b. Staff members from Nonprofit introduce themselves
        i. Describe role at the organization and define role on this project (project lead, project stakeholder, etc.)
        ii. What is exciting about this project?

2. **Nonprofit Organizational and Project Background** (Nonprofit Team Lead) *35 min*
    a. Nonprofit Mission and Program overview
    b. Goals of the Type of Project
        i. Why is this project a priority for the organization right now?
        ii. What does success look like (outputs and outcomes)?
        iii. What work related to this project has been accomplished so far?
        iv. What are some of the challenges that might arise during the course of this project?

3. **Review the Project Process** *40 min*
    a. Run through Project Requirements Document
    b. Discuss initial thoughts and questions on objectives, milestones, and deliverables
    c. Initial reflections from the volunteer(s) about the project needs

4. **Next Steps** *10 min*
    a. Volunteer(s) schedules weekly check-in call with Nonprofit
    b. Volunteer(s) develops project implementation timeline and gets approval from Nonprofit

Appendix G

Sample Wrap Meeting Agenda

Project Wrap Agenda: [Project Title]

Date, Time, Location (or online log-in)

Meeting Purpose:

The purpose of this meeting is for the volunteer(s) to present the final deliverable to Nonprofit and stakeholders and to acknowledge and celebrate the hard work that went into the project!

Meeting Agenda

1. Welcome and Introductions *10 min*
2. Volunteer(s) Presentation *30 min*
    a. Volunteer(s) presents initial project challenge, approach and process
    b. Volunteer(s) highlights key features or points in the deliverable
    c. Volunteer(s) outlines maintenance and any outlying next steps for nonprofit staff
3. Q&A on the Project Process and Deliverable *30 min*
4. Project Reflections *15 min*
    a. Nonprofit lead to discuss the impact of the project on the organization
    b. Volunteer(s) to describe their experience and share highlights/key learnings
5. Acknowledge and Celebrate *5 min*
    a. Closing remarks and recognition

Appendix H

Project Evaluation Template

We encourage organizations to measure their success immediately after their volunteer engagement completes, as well as at designated intervals after the project's impact is realized (e.g. six months out, one year out). Evaluating the success of your pro bono project consistently over the short, medium, and long term will allow you to gauge and communicate the impact your project has had on your organizational capacity and ultimately, on your ability to achieve your social mission.

The format and method of your evaluation may range, depending on what is feasible for your organization. Organizations may utilize surveys, interviews, focus groups, or informal group debriefs. We encourage you to consider which method or combination of methods will ensure the most accurate and informative data capture for your organization. The content of your evaluation should be adjusted based on the measurement interests and needs of your project stakeholders.

Consider these sample survey questions as you build out your own evaluation methods.

Project Goals

The project's role in helping us meet our organization's overall strategic goals or program strategy remained as anticipated.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

The top 3 project goals that were identified before the project began were met.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

The project success metrics that were identified before the project began were met.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

Project Scope

The project met the major project components and milestones as defined in the original project scope.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

The project stayed within the timeline as defined for each of the project components and milestones defined in the original project scope.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

The skilled-volunteer team experience and expertise aligned well with the work that needed to be accomplished to reach our project goals.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

The project plan outlined at the start of the project was referred to frequently while the project was in progress and course corrections were made, as needed.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

Project Leadership

Our staff project lead was able to dedicate the time required to successfully lead the project for our organization.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

Our staff project lead was able to make or facilitate project decisions in a timely matter.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

Our staff project lead was able to successfully share the knowledge of the challenge addressed through the project with the skills- based volunteers.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

Our staff project lead and volunteer team developed a strong working relationship and were able to communicate quickly and effectively (on project feedback, to resolve any project issues, etc.) during the course of the project.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

Post Project Support Plan

Our staff received the required training to ensure that the work on the project was incorporated and maintained in our organization after the volunteers transitioned off.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

The project has been integrated into the organization's day-to-day operations.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

We have saved the project materials developed by the volunteers (project plan templates, decision trees) to use for future internal projects.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

The key stakeholders that need to be kept engaged about the integration of the project and carrying it forward are kept apprised in a timely manner.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

We have secured (or developed a plan for) financial resources (cash or equipment grants, corporate sponsorships) to sustain the project in the long-term.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

Outcomes Reporting

We have defined metrics that will help our organization continue to measure the impact of this project over time.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

We informed our key stakeholders about the start and completion of the project (newsletters, press release, 1:1 meetings).

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

We communicated impact data to our key stakeholders (cost savings, time savings, additional dollars raised, increase in client inquiries).

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

We have incorporated the impact data gathered from this project into our marketing collateral (case studies, stories etc.) to demonstrate our strengthened organizational capacity with key stakeholders.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

Engagement of Volunteers

We have requested project feedback from our volunteers to understand their perspective on project success.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

We have incorporated the project feedback received from our volunteers into our approach to volunteer engagement.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

Our volunteers (or a subset) have remained engaged with our organization after the project came to a close.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

We have added the volunteers to our ongoing communication lists (newsletters, annual appeal letters etc.) to ensure continued exposure to our programs.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

We have recognized the work of the volunteers and have kept them apprised of our progress on carrying the project forward within our organization.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

After this project, we are more inclined and ready as an organization to engage another team of skills-based volunteers to meet another organizational challenge.

- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All