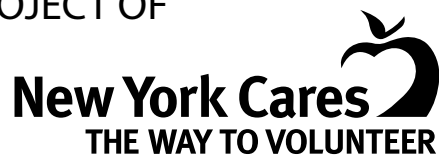


# Great Volunteer Management System

Skills-Based Volunteers

A PROJECT OF



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## **About New York Cares**

New York Cares is the largest volunteer network in the city. Last year, 62,000 New Yorkers made the city a better place by volunteering in New York Cares programs at 1,400 nonprofits and schools – improving education, meeting immediate needs, and revitalizing public spaces. To learn more, visit [newyorkcares.org](http://newyorkcares.org).

## **About NYC Service**

NYC Service, a division of the Office of the Mayor, launched in April 2009 in response to President Barack Obama’s national call for volunteerism and a goal of engaging 100 million Americans in service by 2020. New York City was the first “City of Service” and since NYC Service launched six years ago, over 190 U.S. cities have joined the Cities of Service network.

Today, NYC Service promotes volunteerism, engages New Yorkers in service, builds volunteer capacity and mobilizes the power of volunteers and service year members to impact New York City’s greatest needs. NYC Service is working to increase our City’s volunteer rate from 18% to the 25% national average and our vision is to inspire and empower all New Yorkers to volunteer and serve New York City and each other.

Through our dual focus on volunteerism and the expansion of service year programming, NYC Service is fulfilling its mission by leveraging its greatest resource – New Yorkers – to address New York City’s greatest needs. To learn more, visit [nyc.gov/service](http://nyc.gov/service).

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## Topic A: Introduction to Skills-Based Volunteering

Direct service organizations like yours use volunteers for many things—you have probably had many incredibly helpful people lend their time stuffing envelopes, serving meals, setting up chairs, and packing boxes. When there is so much work to be done, giving clear and discrete tasks to volunteers makes your work possible and allows volunteers to do good.

### **This handbook is not about those kinds of volunteers.**

This guide is to help you make use of skills-based volunteers. These are people who can lend their specialized or professional skills to your organization. Skills-based volunteers include accountants helping with the books, designers creating flyers, computer experts building websites, or videographers making a viral YouTube video to get your message out.

This kind of volunteerism furthers your ability to work towards your mission; it also builds stronger connections between you and your volunteers. When a volunteer's particular skills and talents are engaged they are more likely to have a meaningful, long-term relationship with your organization.

In a blog post for the organization Catchafire, which connects nonprofits and charities to volunteers, Kimberly Dulin (2015) describes who skills-based volunteers may be: professionals hoping to add more purpose to their life outside of their regular work, people between jobs searching for ways to keep their skills up-to-date, graduate school students looking for career-development experience, or retirees looking to maintain their skills and contribute to causes they care about. Dulin points out that by keeping these people engaged, organizations benefit from their knowledge and the volunteers benefit from the experience. But beyond the skills that these volunteers provide, connections made with people outside of your organization “allow you to build your network and expand your pool of donors, advocates, and supporters.” Similarly, Common Impact, a nonprofit organization that works with companies in pursuit of strengthening local communities, found that “over one-third of skilled-volunteers have stayed engaged with their nonprofit partner as board members, mentors, or advisors, providing on-going access to skills that will help the organization continue to adapt and succeed” (p. 2).

To access these benefits, it is crucial to understand that making use of skills-based volunteers requires work from your organization. You need to be able to have defined project goals, the ability to manage volunteers effectively, and be ready provide them with what they need to get their work done. Additionally, the project you have in mind for your skills-based volunteer must be ready to go, with all pieces assembled and ready to hand off to a volunteer. This guide provides a framework for assessing and developing both organizational and project-based readiness.



## Topic B: Examples of Skills-Based Volunteers in Emergency Food

It's well-known that hunger is a problem in the United States; the USDA reports that in 2013 (the most recent year for which there is complete data), 14.3% of Americans, or 17.5 million households, were food insecure. This means that at some time during the year, there was not enough food for all household members (Coleman-Jensen, Gregory, and Singh, 2014).

This situation drives people to rely on the food banks and soup kitchens that make up the emergency food system. Feeding America, a nonprofit with a network of 200 food banks and 60,000 food pantries and meal programs across the United States, serves 46.5 million people each year, or 1 in 7 people in the U.S. (Feeding America, 2014). Moreover, a majority of these people are not infrequent visitors: "these food pantries are being accessed as a consistent, supplemental food source" (p. 7), with a majority of clients visiting food pantries six or more months out of the year (Feeding America, 2011).

The growing understanding of the extent of the hunger problem brings many volunteers to food banks, food pantries, and soup kitchens. Nearly 2 million volunteers, working more than 8.4 million hours in a typical month at pantries and soup kitchens in the Feeding America network alone (Feeding America, 2014). Janet Poppendieck, in her book *Sweet Charity: Emergency Food and the End of Entitlement* (1998) writes that in 1992, 79% of people polled said "yes" to the question "have you personally done anything to help those people who don't have enough to eat in your community such as being a volunteer at a soup kitchen, contributing food to a distribution center and so forth?" (p. 24).

Poppendieck suggests that volunteering in the emergency food sector is so widespread because "there are few barriers to entry" and the work is easy, "everything you need to know, you learned in kindergarten: carrying chairs, pouring juice, setting the table, peeling carrots" (p.28).

But in addition to these simple tasks, emergency food providers need skills-based volunteers to do the work that keeps their sites in operation. Poppendieck writes about the director of a food bank in Florida who got skilled tradespeople—painters, plumbers, and carpenters—to do needed maintenance and repairs with donated materials. She notes that volunteers with skills in grant writing, accounting, fundraising, and administration have stepped up to lend their expertise to help food providers keep their organizations running.

All of which is to say, reducing hunger is more than just serving meals to the hungry. The work of alleviating hunger takes many forms, and volunteers can be used in all areas—not just ladling soup or packing boxes of food. Engaging skills-based volunteers also helps build stronger ties to your organization and creates longer-lasting relationships.

Across the country, emergency food centers have learned that to get this type of help, they have to ask for it. The "Volunteer with Us" sections of many websites now solicit skills-based volunteers. For instance, the Houston Food Bank asks specifically for IT professionals, schedulers, and other skills-based volunteers:

"If you are a plumber, have administrative or HR experience etc. and would like to donate your skills/services when needed, send us your contact info and we will keep in touch when a volunteer opportunity arises! We may need your expertise in some of our departments! We are always looking for ways to utilize our volunteers to the fullest and maximize their enjoyment and impact at the Houston Food Bank."

Similarly, the Harvest Hope food bank in South Carolina asks for “skilled professionals and/or interns that can help in a variety of ways such as: marketing, writing, fundraising, program management, graphics, public speaking, grants, etc.”

Even the USDA points out that “food pantries often need skilled volunteers to help them run their operations. These are ongoing opportunities (such as public relations, accounting, IT and web design services, strategic planning, legal, accounting, design, and fundraising work), and volunteers can often perform these tasks on their own schedules, mostly from their home or office” (USDA, 2013).

A NYC Service survey of 50 emergency food providers in New York City identified a number of areas where they would benefit from skilled volunteers. The most commonly named areas of need were: website development, social media and digital communications strategy, grant writing, fundraising, assisting with benefits enrollment, graphic design and print production, and translation.

No matter the work that the skills-based volunteer will perform for your organization, you must be prepared to clearly define the project goals and see the work all the way through. The rest of this guide is designed to help you assess your organization’s readiness to manage skills-based volunteers, ensure your project is volunteer-ready, recruit the right skills-based volunteers for the job, and manage the volunteers effectively.



## Topic C: Assessing Your Organization's Readiness to Manage Skills-Based Volunteers

To effectively make use of skills-based volunteers, you need both organizational readiness and project readiness. Organizational readiness includes the ability to identify needs, clearly define projects, and have the capacity to manage your skills-based volunteers effectively. Project readiness means that the work you have in mind for your skills-based volunteer is fully scoped and ready to hand off to the volunteer, with all pieces assembled and systems organized. This section describes the concepts of organizational and project readiness in further detail and provides tools for helping you assess each.

### i. Organizational Readiness and Assessment Tool

Organizational readiness concerns the strength of the organization's mission, vision, goals, leadership, and capacity to manage volunteers. Four key components of organizational readiness are:

#### *Strong Leadership*

- Clear vision for the future and a plan to get there
- An innovative approach, with programming that changes to meet evolving client needs
- Ability to convey this to volunteers

#### *Potential to Create Change*

- A compelling vision for social transformation
- Engaged in work that moves the organization closer to its goals
- Ability to communicate to volunteers how their work will relate to the mission

#### *Effective Relationship Building and Communication*

- Shows interest in volunteers and their reasons for participating
- Engages volunteers, staff, and board members in work meaningful to them
- Solicits feedback from staff, volunteers, and clients

#### *Organizational Stability*

- Solid financial footing and consistent staff
- Constant contact with same staff member for volunteers

## Tool For Assessing Organizational Readiness

If you are able to answer “yes” to the questions and fill in the information below, your organization is likely ready to take on skills-based volunteers.

### *Strong Leadership*

Do we have an up-to-date mission statement?	<b>YES</b>	<b>NO</b>
Where can it be found?		
Can we clearly explain what it is we do? <i>Write it below in 2 or 3 sentences.</i>	<b>YES</b>	<b>NO</b>
Can we explain how our work is meeting client needs? <i>Give 2 or 3 examples below.</i>	<b>YES</b>	<b>NO</b>

### *Potential to Create Change*

Can we show what makes our programs successful?	<b>YES</b>	<b>NO</b>
What data can you mobilize to show this?		
Does all the work we do relate to our mission? <i>List 3 programs and connect them to the mission.</i>	<b>YES</b>	<b>NO</b>
Do we have clear organizational goals for the next few years?	<b>YES</b>	<b>NO</b>

How do they inform the mission?

*List 3 organizational goals and how they relate to the mission.*

Is the staff all on the same page about what kind of change we are trying to achieve?

**YES NO**

Ask 2 staff members about the organization's specific change goals.

#### *Effective Relationship Building and Communication*

Why do our current volunteers participate?

*Name 3 individual volunteers and summarize their volunteer-engagement stories.*

Do we have a process for soliciting regular feedback from all staff and volunteers?

**YES NO**

*Describe it below.*

Are our clients happy with the services we provide?

**YES NO**

*What process do we have for gauging client satisfaction?*

What systems are in place for communication amongst staff and volunteers?

Have we successfully acted on suggestions made by volunteers?

**YES NO**

*Give an example below.*

### Organizational Stability

Do we have the bandwidth to manage external volunteers?	<b>YES</b>	<b>NO</b>
Describe how you can fit external volunteers into the operations of your organization.		
Do we have staff members with available time to be in contact with volunteers? <i>List them, and what kind of volunteer projects they can manage.</i>	<b>YES</b>	<b>NO</b>
Are we sure that our goals will remain constant through the duration of the volunteer project?	<b>YES</b>	<b>NO</b>
Will we be able to see this project all the way through?	<b>YES</b>	<b>NO</b>
Do we have enough money to cover project related costs? <i>Explain where the money to cover this project will come from.</i>	<b>YES</b>	<b>NO</b>

### Identifying Gaps That Skills-Based Volunteers Can Fill

Once you've determined that your organization is able to take on skills-based volunteers, you are ready to identify where you can use skilled volunteers.

One way to think about skills-based volunteers is as short-term staff. This may help you envision what specific work tasks you would like done: If you could hire an additional short-term staff person, what would you have them do?

Look at the volunteer needs pages of the websites of similar organizations. For example, the Houston Food Bank specifically asks for a volunteer to serve as a scheduler, who "receives volunteer shift requests and works behind-the-scenes to keep volunteerism running smoothly." Would your organization be well served by taking on a volunteer to do that sort of work?

Think through all the parts of projects you already know you need. If you are engaging a skills-based volunteer to create a website for you, do you have good, high-resolution photographs for the web designer to use? If not, you can reach out to a skilled photographer to take photographs for your organization to use.

Do you want to use client stories in a social media campaign? Recruit a skilled volunteer to interview clients and write narratives that can be used in marketing.

Whatever the project you chose, you must be able to articulate how it gets your organization closer to meeting its goals. Your volunteers want to match their skills to meaningful, purposeful work.

### **Characteristics Of A Good Skills-Based Volunteer Project**

Not all identified needs make for great skills-based volunteer projects. Here is a framework for understanding what makes a project the right fit for a skilled volunteer to take on.

#### *Clearly Defined Scope*

A project is a good candidate for a skills-based volunteer when you are absolutely clear about exactly what work you need from your volunteer. You must be able to articulate everything that the project should contain and what work you expect your volunteer should do. Write out the specifications so volunteer knows what to work with, have the volunteer read and sign-off on this document, and ask the volunteer to make note of further related tasks or activities outside the scope that arise in the course of the project for identifying further projects.

#### *Defined Deliverables*

You must also have a clear understanding of what your volunteer will provide to your organization at the end of the project; this can include materials, training guides, implementation plans, etc.

#### *Not Time-Sensitive*

A great skills-based volunteer project should have a flexible deadline and a generous time frame. The trade-off with using volunteers is that projects may move somewhat slowly, and because volunteers work on their free time, people's schedules can always change. Therefore, selecting projects that are not time-bound avoids potential disappointment. If you have a desired done-by date, make sure to let the volunteer know, begin well in advance, and know that even the most reasonable plans can get waylaid.

Note: Most volunteers will put in 1-2 hours a week, and a timeline of 4-6 months should allow for a significant project to be completed.

#### *Defined Milestones*

Even though an ideal skills-based volunteer project is not time-sensitive, it should still have a timeframe for your volunteer to work within. Establishing how long the project will take will help to ensure that your volunteer can commit to the entire project. The project must have defined milestones or break-points to hit along the way. Milestones ensure that you check-in with your volunteer about the progress of the project. Further, a project that can be done in phases allows for new volunteers to pick up if or when other volunteers leave.

The actual timeline of the project, including start and end dates, and a calendar for hitting the milestones, should be decided on in partnership with your skills-based volunteer. Create a schedule for regular check-ins, and allow for communication on changes to the timeline.

Some example milestones:

- Beginning—Go over project scope and deliverables
- Milestone one (1-2 months out)—First draft, feedback, and questions

- Milestone two (2-4 months out)—Nearly final draft and gather additional information to tweak/ finalize
- Close out (4-6 months out)—Hand off of final deliverables, training/explanation, thanks and recognition

#### *Can Be Completed Remotely*

A great skills-based volunteer project can be worked on from an off-site location on the volunteer's own time. It will be easier to find volunteers if the work can be completed evenings and weekends and from the volunteer's home.

#### *Respects the Volunteer's Skills and Enthusiasm*

It is utterly important that the project respects the volunteer's skills and doesn't take advantage of their enthusiasm. Begin by asking what the volunteer wants: many want to learn new skills, meet new people, or contribute to a cause. They will be more satisfied if they get what they want out of the work, so ask them. Then, ask the volunteer to offer their thoughts on the scope: deliverables, timeline, and working style. This is their area of expertise. What may you have overlooked that they can see? Make sure that you then stick to the defined timeline and project scope. Do not expect your volunteer to take on additional tasks or work indefinitely. Finally, check in regularly to make sure your volunteer stays connected to the organization and is happy with the work they are doing.

This list, of course, has room for flexibility. Some skills-based volunteers work better on-site (a refrigerator technician will likely want to fix your fridge at your food pantry rather than taking it home, or a photographer will necessarily need to come and take photos of your programs as they are happening). However some projects, like grant applications, have hard deadlines. What is essential is that you communicate well with your volunteers to make sure that everyone is in agreement about the scope and timing of the work.

## **ii. Project Based Readiness and Tool Assessment**

Once you have identified organizational gaps that can be filled by skills-based volunteers and selected a project that is a good fit for a skills-based volunteer, you need to ensure that your project is ready to be handed off.

### **Characteristics of Project Readiness**

#### *Organizational Agreement*

- Consensus among staff and organizational leadership about the goals of the project and the value of the project to the organization
- Cross-organizational knowledge of the project
- All project-related staff must be ready to take on volunteers and understand their responsibility for managing or interacting with the skills-based volunteer

#### *Defined Project Leadership*

- One person to oversee the skilled volunteer and give feedback on their work
- A clear person and process for making decisions and securing approvals regarding the project

#### *Completed Pre-Project Groundwork*

- Defined project goals and scope of work

- Clarity on what the skills-based volunteer needs to know to start working
- Assembled documents, files, phone numbers, logos, and materials ready to give to volunteers

*Post-Project Plan*

- Define how the volunteer’s work will be incorporated into the organization
- Understand how their work will be maintained and updated
- Plan for how and when the volunteer will train staff on what they have created

**Sensitive Information and Liability Considerations**

Part of laying the groundwork for your skills-based volunteer projects includes addressing liability considerations surrounding sensitive information. For some projects, like writing a grant application, you may be providing your volunteer with sensitive client information or financial documentation that is not generally shared publicly. Here are some actions you may want to take to help you make sure sensitive information is not compromised:

- Establish (and follow) a screening procedure for volunteers that may have access to sensitive information. Be open about this screening process and be clear that not all volunteers will be accepted
- Ensure all involved staff members know what information is considered sensitive
- Develop a clear policy about what information your volunteers may not share and/or discuss
- Edit organizational documents before you hand them off to your volunteer, for example, replacing client names with initials
- Have your volunteers sign a volunteer agreement and/or liability waiver
- Alternatively, have a staff person add all financial (or other sensitive) information to the project after your volunteer has finished their part of the work.

**Tool For Assessing Project Readiness**

If you are able to answer “yes” to the questions and fill in the information below, your project is likely ready to hand off to your skills-based volunteer.

*Organizational Agreement*

Does everyone who works at the organization know about this project?	<b>YES</b>	<b>NO</b>
Does everyone agree about what the project is supposed to accomplish?	<b>YES</b>	<b>NO</b>
Does everyone believe that this project is useful to the organization’s mission? <i>Ask 3 coworkers about what they know about the project, what they think it will accomplish, and how they think it fits into the organization’s mission.</i>	<b>YES</b>	<b>NO</b>

<p>Have we consulted with other stake holders—such as the board, or clients—about the value of this project? <i>Explain when and how.</i></p>	<b>YES</b>	<b>NO</b>
<p>Is everyone whose work will interact with this project able to make time to engage with the skilled volunteer? <i>List the staff who will interact with this project, and how they will make time for the volunteer.</i></p>	<b>YES</b>	<b>NO</b>

*Defined Project Leadership*

Who is the lead staff person for this project?
How will they make time for project management?
What project elements is that person allowed to make final decisions on?
What project elements must that person clear with their supervisors before making decisions, and who must they check in with?
Have those higher-ups committed to making clear and timely decisions? <b>YES</b> <b>NO</b>



Completed Pre-Project Groundwork

What kinds of deliverables are we expecting the skilled volunteer to provide?

What information and resources will we need to provide the volunteer? Do we have those pieces assembled and available to hand off to the volunteer?

*List them here, and check off when they are assembled and ready*

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

What will a successful project will look like?

What policies do we have in place to ensure that sensitive information is protected?

Post-Project Plan

How will the skills-based volunteer's work be incorporated?

Who is responsible for integrating the project into the functioning of the organization?

Do we know how to use what the volunteer is creating?

**YES NO**

Will the volunteer be able to train staff on their work?

**YES NO**

*If not, who will?*

Do we have a defined place to store materials/passwords/plans? <i>Where?</i>	<b>YES</b>	<b>NO</b>
Which staff person will maintain the project or make updates?		
Will the volunteer be available for future edits/fixes/updates? <i>If not, who will?</i>	<b>YES</b>	<b>NO</b>

## Topic D: Project Readiness For Three Types Of Skilled-Volunteer Projects

NYC Service surveyed 50 emergency food organizations in 2014 and found that all were interested in taking on skills-based volunteers to push their work forward. The top areas of needed volunteer expertise were website development, social media and digital communications strategy, and grant writing. The following sections outline what project readiness looks like for each of these three tasks, focusing on what your organization needs to have in place to take on skills-based volunteers and use their talents effectively.

### i. Website Development

Website development and design is a great way to engage skills-based volunteers. Building or redesigning a website can be done off-site, makes use of a volunteer's specific talents, can be phased, and can be completed in a reasonable timeframe. It is essential that you have everything in place to allow your volunteer to hit the ground running and work independently to create the website that you need.

#### Defined Scope

##### *Content*

Begin by thinking through what sort of website you want. Spend some time looking at the websites of similar organizations, both in mission and in size. If you are a food pantry, for example, what do other food pantry websites include? What about the websites of different direct-service organizations? In planning your website, you need to know who the site is for: Clients? Volunteers? Donors? If it is for more than one of these groups, you may need separate sections. Decide what you want visitors to your site to do: Learn about your services and sign up for them? Volunteer time? Donate money? Donate goods? Become a member? This will inform what pages and features you need on your website, and how your site should be organized.

Knowing who at your organization will be responsible for understanding, maintaining, and updating your website will also influence what features you should have. Remember that calendars and blogs need constant updating. If you can't dedicate staff time to that, don't add those features to your site. Also, consider the skills required for a staff member to update and maintain the site. It is important for your skills based volunteer to build a site that is sustainable in relation to the skills of the staff member responsible for maintaining it.

Some common website pages and features:

- Front page—Includes address, hours, contact information and compelling images
- About us—Mission, staff list with bios and contact information
- Services—Descriptions, schedule
- Calendar of events
- Schedule a pick-up/drop-off/appointment etc.
- Sign up to receive services
- Sign up to volunteer
- Donate money
- Join a mailing list
- Blog
- Streams from other social media sources, like your organization's Twitter or Instagram accounts (see section on social media and digital communications)

Write the content for each section in a text document. Remember: each section has to have content. You will need:

- An organizational description (best to have this at a few different lengths, ranging from catchy phrase to a few paragraphs)
- General organization contact information
- Staff list with contact information and optional photos and biographies of each staff member
- Succinct and clear descriptions of any particular services, programs, or initiatives the organization offers
- Text for any of the above pages listed above that you are including

One trick is to print out each 'web page' on a single piece of paper. This can help you determine which pages don't have enough content, and which pages might need to be split into two or more.

If you want your volunteer to write the content, this work might be done better by someone who is a skilled writer, rather than a web designer. Engage that skilled-based volunteer first, then have the content available for your designer.

Along with the content, provide the volunteer with links to other sites that show the features and pages that you want. This will be especially helpful for event calendars, schedules, and sign-up pages.

### *Design*

Just as important as well-written and organized content are the photos on your website. Good photos of the organization in action, the staff, the facilities, the intended client population, and so on make all the difference in effectively communicating information about the organization to distracted internet users. If you do not have good photos, engage a skills-based volunteer to come and take some.

Assemble and organize all the photographs before handing off to your volunteer. For the web, the photos can be small file sizes—photos taken with a smartphone can be used if they are well-composed. If you have preferences about what photos (or types of photos) to use on certain website sections, make this clear to your volunteer.

Provide your skilled volunteer with your organization's logo (ideally in a vector-based file format like .ai, .svg, or .eps) and whatever brand or design guidelines your organization has (such as colors, shapes, fonts, and so on). If you don't have design guidelines spelled out anywhere, provide your volunteer with any branded materials, such as business cards, signage, flyers, pamphlets, or truck-side murals.

If you don't have logos in the right format (or at all), or design schemes to match, this will make more work for your web designer and might extend the length of the design project.

If you plan on producing print materials, you might engage a skills-based volunteer with design skills to create these graphic elements before making your website, or have a graphic design volunteer work off of what has been created by the web design volunteer. For print, you will need photos with larger file sizes than the web requires, so spend the effort to take great, high-resolution photographs. Your web designer will be able to re-format the photos for the website.

Checklist of things to provide your website volunteer:

- List of pages and features and thoughts on site organization
- Reference links to examples of pages and features

- Content for each page, including
  - Organizational description
  - Staff bios and contact info and photos
  - Succinct and clear descriptions of any particular services or programs or initiatives the organization offers
  - Address(es) and general organization contact info
  - Notes on what kind of photo you want with each kind of page
- Batch of good photos (These could be shared on a thumb drive, or through a service like Dropbox or Google Drive. Make sure you communicate your organization's technical capabilities or limitations with your volunteer.)
- Logo files
- Design guidelines
- Other branded material for reference
- Any existing hosting and domain information or passwords

## Milestones

Check in with your volunteer at each of these milestones for two-way feedback. Make sure your volunteer is creating the website that you want, but also give them the opportunity to draw on their expertise and experience and suggest changes in the website's structure, content, features, etc.

Milestones include:

- Site organization framework
- Overall site design
- Individual pages up
- Photos or images for each page
- Final site

## Deliverables

Your skilled web-design volunteer will provide you with a new or newly designed website. But there are a few additional things you should be sure that they provide.

### *Essential*

- Instructions for maintenance and updating the website
- Passwords for administrator accounts
- Passwords for domain ownership
- Information about the website host, including when the site needs to be renewed, and any accounts or passwords with the hosting providers

### *Nice to Have*

- Access to logs or analytics that tell you who is visiting your site and other statistics
- Information about how to use or interpret these

## Post Project Plan

Finally, you need to think through what happens after the site is built. At the beginning of the process you determined which staff at your organization will be responsible for maintaining, updating, and understanding the website. This is where they come in.

- Hold a training for staff on how to use the new website
- Make sure the passwords and accounts provided by your web-based volunteer are stored in an accessible place
- Set up a schedule for updates to calendars, blogs, other features
- Determine what will happen to information submitted through the website (sign-ups, etc.)
- Ask if your skilled volunteer is available for future tweaks or fixes. If not, assemble a list of other skilled volunteers who might be.
- Thank your volunteer! Acknowledge their work at any or all upcoming launch parties, fundraisers, staff or board meetings. Ask your volunteer if they would like their name and contact information on the website, and for how long they would like to keep it up.

## ii. Social Media and Digital Communication Strategy

Social media and digital communications can be a great way to connect with clients, volunteers, supporters, and donors. This is an area with potential to be a great skills-based volunteer project. However, it is recommended that skills-based volunteer-led projects are able to be accomplished in 4-6 months, and social media engagement is designed to be ongoing. You must be clear about what you want your volunteer to provide and set an end date for their participation.

Social media and digital communications can take many forms and work towards multiple goals. It is important to think about your approach in terms of strategy, or what you are trying to accomplish with your campaign, and tactics, or the tools and actions you will employ. When bringing on a skills-based volunteer in this area, it is important to make sure that person demonstrates good judgment either through work they have done in the past, or through a formal interview process. Social gaffes or inappropriate postings can really take off, and can do harm to your organization. It is also important to work very closely on content creation with your social media and digital communications volunteer, and to ensure that all social media posts are being monitored by staff. Since this volunteer is speaking for the organization, it is incredibly important that organizational staff are on top of the message being communicated.

### Defined Scope

Defining the scope of your social media campaign begins with defining your strategy, and answering broad questions about what you are trying to achieve.

What programmatic goals are you trying to achieve with your organization overall? Digital communications can help you meet these goals. For instance, are you trying to raise money? Bring in more clients? Keep volunteers and community members informed about what your organization is doing? Attract greater turnout at events?

One way to think this through is to consider what similar and complimentary organizations are doing with their social media campaigns. Make a list of 5-10 organizations that work in a similar realm, would be possible collaborators, or have overlapping audiences. What are they doing with social media and digital communications that you might want to mirror? What kinds of posts and what tools best engage their audiences? Then, make a list of 5-10 organizations that are doing work that is very close to what you are doing. Look at what niches they're not filling, and consider how you may want to fill those.

Once you know what you are trying to achieve with your digital campaign, decide what audiences are

important to achieving those goals. For instance, if you are a food pantry looking to attract more volunteers and 90% of your volunteers come from local church groups, then you might want to use social media to reach more church groups. If your goal is to diversify your volunteer base, you would identify a different audience.

Remember, your skilled volunteer may have expertise in matching goals to audiences, so come to the project with clear ideas but also be open to their perspective.

Provide your volunteer with a comprehensive list of the ways you currently communicate with your clients, donors, volunteers, and community members, and the different ways you engage with each. Be honest about how well these strategies are working. This will help your skilled volunteer identify gaps and suggest improvements.

Once the strategy is in place, and you are clear on what you are aiming to achieve through digital communications, you need to decide what tools you would like to use. This is the tactics part of social media strategy. You can work with your volunteer on this piece—they are the experts, after all—but knowing what tools you are interested in employing is a good place to start. Do you want to share stories through words or photographs? Do you want to keep a blog or an Instagram account? Do you want to send group text messages to your clients? Remember that these will be ongoing activities that need staff and volunteers constantly keeping them up to date.

Checklist of things to provide your skills-based volunteer:

- List of current communication strategies
- Access to existing social media properties, including usernames and passwords
- Access to your email platform
- Access to your website login
- Inventory of and access to photographs and videos that can be used in social media posts (like with the website, if you don't have any good photos, this can be a place to engage other skilled volunteers).
- Organizational mission statement, in short, medium, and long versions
- Organizational history, facts, and statistics that might make for interesting posts
- Logos, design guidelines, or any branded materials for reference
- Any messaging guidelines to shape what can or should be said in social media posts. Do you have language you prefer to use or prefer to avoid? Are there issues that you avoid talking about?
- Any stories that could be used for social media content. Human interest stories always perform the best. For example, a story of a food pantry volunteer who is a former client who also used your organization's job-seeking services to find better work and climb out of poverty. This can include stories about beneficiaries, volunteers, staff, etc. (collecting these stories can be a great task for other skilled volunteers).
- A list of people at the organization who could help with each of the things listed above (content assets, human interest stories, etc.).
- A list of 5-10 people, places, or organizations you'd be thrilled to get attention from. This can be related groups and organizations, magazines or newspapers, specific blogs or websites, elected officials.

## **Milestones**

Check in with your volunteer at each of these milestones for two-way feedback. Make sure your volunteer is creating the social media campaign that you want, but also let them draw on their expertise and experience to suggest changes in the strategy, tools, content, etc.

Milestones include:

- Creation of all-over strategy
- Development of specific social media tools
- Development of guidelines for how and when to use each
- Assigning responsibility for the maintenance and updating of each tool to staff/volunteers
- Hand off of the campaign to the organization

However, because this skills-based volunteer will be speaking on behalf of your organization as they post to social media and send out other digital communications, you must ensure consistent staff monitoring of this content in addition to check-ins at milestones.

## **Deliverables**

At the end of the skilled volunteers' participation in the project, they should provide:

- A document outlining the social media strategy
- A list of all social media accounts, with usernames/passwords, and any expiration or renewal information
- Training materials specifying best practices for using each tool, for instance:
  - 1 Facebook post a day for 3 months
  - 1 blog post a week for 6 months
  - Instagram photos taken by direct service volunteers

## **Post Project Plan**

For your project to be successful, your organization must be ready to take on the ongoing tasks of running their social media sites. You must find staff to manage each platform.

Ensure a safe, secure, and knowable place to store all the login and other information related to each social media tool.

Select a date to check in with the relevant staff members to assess the efficacy of the campaign. Are you achieving your goals? Are there unexpected benefits? Unexpected burdens?

Ask if your skilled volunteer is available for future review or updates. If not, assemble a list of other skilled volunteers who might be.

Thank your volunteer! Acknowledge their work at any or all upcoming launch parties, fundraisers, staff or board meetings. Ask your volunteer if they would like their name and contact information on the website, and for how long they would like to keep it up.



### iii. Grant Writing

Successful grant writing can bring much-needed money and resources to your organization, and is a great way to involve skills-based volunteers in your organization's work. The writing can be done off-site, and makes use of your volunteer's strengths. If you have the groundwork in place, it can be completed in a reasonable timeframe.

Engaging a skilled volunteer through grant writing requires strong organizational readiness as well as project readiness. Because so much of grant writing is about the organization's mission, vision, goals, and past successes, this all must be clearly articulated and known by all leadership, staff, and volunteers. Your skilled volunteer is expert in telling stories that show how your organization is set up to have significant social impact, but they need substantial material and support from you to be able to do so—they need to understand the world as you do.

Two important considerations:

1. Projects for skills-based volunteers are, ideally, not time sensitive; grants almost always have firm deadlines. Guard against disappointment by beginning the work well in advance, and understand that the grant still might not get completed by the time it is due. If the grant is absolutely essential to your organization, a paid grant writer is a safer choice.
2. There may be liability issues when volunteers have access to client information or financial statements beyond what is publicly available. Pay particular attention to the information about sensitive information and liability concerns in Section C.

#### Defined Scope

##### *Grant Specifications*

The grant itself will have clear specifications, which may include multiple components (written proposal, budgets, financial statements, contact information). Be clear what sections you would like the volunteer to address.

Set a deadline by which you would like the volunteer to complete the grant so that anyone in your organization who needs to approve it has time to do so.

Decide if you want the volunteer to also take care of formatting and assembling all the pieces. Make sure the details of how to submit (electronically or hard-copy) and when to submit (and if that is a postmark or delivery date) are well understood. It is important that submitting the grant application should be done by a staff member, and not the volunteer.

##### *Information To Provide Your Volunteer*

Go through the grant specifications and highlight everything that it requests. Make a list and make sure you have information to provide your volunteer for each section.

Some of the information you are likely to require is listed below. It may be helpful to have a Word file, Google Doc, or even just an email with all this information that can be updated periodically for future skills-based volunteers to use (both for future grants, as well as other projects like website development or fundraising campaigns or volunteer recruitment). It is divided into general organizational information and grant-specific information.

## Organizational Information

- Mission statement/what we do
- Organizational vision
- History of your organization
- Statistics (number of programs offered, clients helped, meals served, etc.)
- Contact information and address(es)
- Staff bios, phone numbers, and emails
- Leadership bios
- Board member information
- List of partner organizations
- Organizational financial documents\* (budget, revenues sources, audited financial statements, etc.)
- Proof of tax-exempt status\*
- Logos (if you don't have a logo, you may want to engage a different skills-based volunteer to create one)
- Good photographs of your programs and clients (if you don't have a good, high-quality photos, you may want to recruit a skills-based volunteer to take some for you)
- Copies of previous successful (and unsuccessful) grants

\* Note: Check for potential liability issues when sharing this information with a volunteer.

## Grant-Specific Information

- The granting organization's goals and priorities: the volunteer will need this to tailor the grant application.
- Statement of Needs. This includes the research that contextualizes your proposal or request for funds (i.e. statistics about hunger in your borough or neighborhood to show why your food pantry needs funding).
- Information about the program for which you are writing the grant. This includes planning documents, client-facing program descriptions, flyers or emails advertising the program or project.
- Anything about the organization's strategic objectives that can be used to help explain how this project also makes sense in terms of where the organization is intentionally heading.
- Information about the organization's other programs/projects, especially those which have comparable impacts, outputs, or background processes.
- Program/project budget
- Project implementation plan
- Activity calendar and/or timeline
- Anticipated project outcomes
- Evaluation plan
- Project partners or advising organizations
- Contact person (staff member)

## Timeline, Tasks, Deliverables

Even with meticulous pre-planning, grant writing is a collaborative project that will require a few iterations. Below is the list of phases the grant will likely go through—you and the volunteer must decide which milestones require check-ins, and what tasks will be done by the volunteer and which will be done by you or your organization. This process will move smoothly if the volunteer's staff contact is a) consistent through the life of the project, and b) empowered to make decisions and provide requested information and clarification quickly.

### *Timeline and Tasks*

- Initial discussion of grant needs: deadline, scope, timeline, format, what the final project will look like, responsibility for submitting
- Outline
- First draft (includes likely request for additional information)
- Editing
- Gathering supplementary information
- Second draft
- Editing
- Near-final draft
- Adding any sensitive information not given to the volunteer
- Editing
- Proofreading (to be done by someone other than the grant-writer)
- Fact checking (to be done by organizational staff)
- Adding logos and/or letterhead
- Assembling
- Sending on time—to be done by a staff member, not the volunteer

### *Deliverables*

Ensure that the volunteer provides you with the grant in an editable format so that it may be used as the basis for future grants (in addition to whatever hard copies or PDFs are produced). If they did any layout, have them provide you the layout files and all images and logos they used.

### **Post Project Plan**

- Set a date to follow up with the grant making organization (should that be required).
- File copies of the grant in accessible, known places for future reference.
- Thank your volunteer. Acknowledge their work at any or all upcoming launch parties, fundraisers, staff or board meetings. Ask if they would like their name and contact information on the website.
- Follow up with the volunteer when you hear back from the grant-making agency; let them know if the grant was successful or not.



## Topic E: Recruiting Skills-Based Volunteers

Once you know what tasks you would like skills-based volunteers to work on, you need to recruit the right people for those projects. Skills-Based volunteers get connected to your organization's work in a variety of ways. Here are some ways of thinking about who volunteers are and how to recruit them. Remember that recruiting volunteers can be a job for a different skilled volunteer!

### *Individuals*

- Many people volunteer as individuals, who may be looking for meaningful work, a way to engage with the community, a social experience, or professional development opportunities.
- Start with your existing volunteers. A short survey in person or online can tap into their latent skills and strengths. A person chopping vegetables in your soup kitchen may also be interested in grant writing.
- Existing volunteers may also know people with the skills you seek, so communicate your needs for skills-based volunteers in other volunteer communications.
- Similarly, members of your board may be interested in further volunteer work, or finding skilled volunteers.
- Post your volunteer needs on your website.
- Websites like Catchafire, Taproot, and NYCService exist specifically to help organizations recruit volunteers.
- Job websites like Craigslist, LinkedIn, and Idealist make it possible to post volunteer opportunities.
- Advertise your need for volunteers through partner organizations or other community groups' communications.

### *Community Groups*

- Many people choose to volunteer in groups or find volunteer opportunities through their membership in other organizations. Reaching out to existing groups makes it possible to recruit multiple skills-based volunteers at once.
- Make use of community resources, like Community Boards or City Council Member's mailing lists.
- Some organizations—like churches or community centers—have outreach systems.
- Ask existing volunteers if they belong to groups that could promote your volunteer needs.

### *College and Graduate Students*

- College and graduate students are a specific subset of community groups.
- University career centers have job and volunteer posting boards.
- Reach out to college clubs that are related to your work. If you run a food bank, reach out to a university's food justice club.
- Specific departments can advertise opportunities to their students who are looking for experience or internship-type activities. For instance, an environmental studies or landscape architecture department could help you find students to build a community garden.

### *Corporations and Other Workplaces*

- Large corporations sometimes have specific commitments to help connect their employees to volunteer work.
- The organization Points of Light makes it possible for nonprofits to find corporate volunteers ([pointsoflight.org/for-nonprofits](http://pointsoflight.org/for-nonprofits)).
- Smaller companies might also find value in lending their employees to help social mission causes.
- Ask your volunteers and board members if their places of employment might be viable partners.



## Topic F: Managing Off-Site Volunteers

Projects that are good candidates for skills-based volunteers are those that can be done off-site, in the volunteer's free and flexible time. This doesn't mean that you can just hand off your project to the volunteer and expect them to return the deliverables in 4-6 months. Off-site volunteers need management like any other worker or volunteer.

### *Begin by Listening*

Volunteers come to your organization for many reasons: connection to the mission, social interaction, professional development experience, and so on. By listening to your volunteers' reasons for lending their time and talent, you can work to make sure they are getting what they want out of the experience.

Talking with your volunteer about why they are volunteering also helps to begin to build a relationship, and lets them feel included as an individual, not just free labor.

### *Clear Project Scope*

This essential component of project readiness is a cornerstone of volunteer management. By making sure your skilled volunteer knows exactly what needs to be done, they can work effectively and efficiently, without losing time waiting for instructions.

### *Known and Consistent Staff Project Lead*

Ensure that your volunteer knows who is responsible for the project, and have this person remain in the lead for the duration of the skills-based volunteer's involvement. Ideally, this person is empowered to make decisions relating to the project, so that the volunteer's work is not held up waiting for answers.

For some projects, where the volunteer may need information or answers from staff throughout the organization, be clear about whether the volunteer should go through their staff contact or if they can reach out directly. For example, if your skills-based volunteer needs financial information while writing a grant, should they ask your CFO directly, or go through the project lead?

### *Regular Two-Way Communication*

Your project scope includes milestones where communication between the skilled volunteer and staff is required, but these need not be the only times where you communicate with your skilled volunteer. Schedule regular check-ins—over email, by phone, in-person, or a combination -- for project updates. This has the benefit of making sure the project is progressing well, makes it possible to address any issues as they arise, and keeps the volunteer feeling needed and included.

### *Make Room for Feedback*

Offer both positive and constructive feedback on your volunteer's work, and solicit feedback on your contribution. Ask directly: "Is there anything you need from me that I'm not providing? Is there anything I can do better?"

Encourage your volunteer to keep a list of project elements that weren't initially considered, or additional work that will need to be done. This can help you with the project scoping for future skills-based volunteer projects.

### *Respect Their Time and Contribution*

Don't forget that your skills-based volunteer is just that, a volunteer, and as such, it is extra-important to

respect their time and desire to contribute to your organization's work.

This means that you must understand that they are working in their free time, so allow for a more relaxed response time than you would expect from a paid employee or contractor. Expect that deadlines and milestones may need to shift.

Second, do not demand extra work or expect that your volunteer will take on more responsibility than initially agreed upon. It is good practice ask the volunteer to make note of extra or unanticipated work—at certain break-points you can go over this list and ask the volunteer if they would like to do the work, or you may need to find other volunteers to complete it.

### *Appreciation*

Make sure your volunteer knows you appreciate them and their work. Thank them often and share organizational swag (T-shirts, tote bags, etc.), but also make sure to find opportunities for more formal appreciation, such as bringing them up to the front at fundraisers or staff meetings, highlighting their work, and connecting them to it. For skilled volunteers who are using this as an opportunity to build a portfolio—such as a junior web designer—making sure that the person is known to be responsible for the product is a huge boost. Similarly, if your volunteer would like the exposure or recognition, put their name and contact information (or whatever they request) in year-end reports and on your website (just make sure you check with them first). Finally, provide documentation of their contribution, such as a certificate, thank-you letter, or formal reference letter.



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