



# Skills Based Volunteering: Build Capacity, Develop Partnerships

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# Agenda



Introduction

Skills Based Volunteer Overview

Typical Concerns and Challenges

Project Planning and  
Measurement

# **SKILLS-BASED OVERVIEW AND VALUE**

# Defining Skills Based Volunteers



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- Skills based volunteerism uses individual or collective volunteer and/or corporate expertise to assist a nonprofit
- Traditional skills based volunteerism utilizes the skills, experience, talents and education of volunteers to directly meet the needs of nonprofits
- Most skills based volunteers use their work experience as part of their volunteer work

# Skills Based Volunteerism Defined

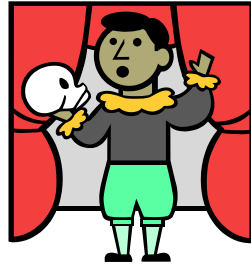


- Finds the intersection of corporate values and skills and then matches them to the needs of local nonprofits
- Shifts the focus from the nonprofit setting the agenda to a mutual strategy developed between the volunteer (or company) and the nonprofit
- Creates meaningful and measureable impact
- Is affected by the skills, interests and values of the volunteer (or company) as well as the recipient of the volunteer effort
- Project-based – has a defined scope of work with a beginning and end

# Three types defined



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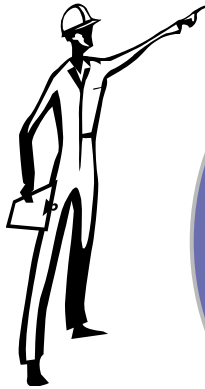


Skilled  
Volunteer



Pro-bono  
Volunteer

Skills-  
based  
Volunteer



How have you used pro-bono  
or skills-based volunteers?

# Types of Skills Based Volunteers



- Companies/businesses – many companies allow whole departments, teams, or specific individuals to participate
- Teams – Some professional groups, colleagues seeking to work together, or teams within a company participate
- Individuals – some individuals who may be working, between jobs, or retired participate



# Typical Skill Based Volunteer Activities



Strategic Planning

Information Technology  
Assistance

Web Site Creation and  
Maintenance

Financial Management

Property Management

Facilities Planning

Electrical

Architecture

Construction

Marketing

Legal Advice and  
Representation

Graphic Design

Market Research

Human Resources

Accounting Services

Training & Skill Development

Executive Mentoring

Board of Directors Membership

Medical/Nursing

# Typical Skills Based Project Structure



1. Assessment of Nonprofit Need
2. Connecting/Selecting Nonprofit and Volunteer(s)
3. Agreement of Scope of Work and Timeline
4. Project Management with Ongoing Check-ins
5. Altering Scope of Work as Needed
6. Evaluation of Project Success
7. Celebration of Project Success

# Skills Based Volunteerism

## Nonprofit Benefits



- Dramatically increases the value of volunteer service to an agency. Skills based is valued between \$40–500 an hour depending on the market value of the specific job function. Current value for traditional volunteering is \$22.14.
- Skills based volunteerism offers an alternative to hiring vendors or depending on staff to fill functions they are not skilled in
- Using skill based volunteerism allows nonprofits to reallocate budgetary funds to mission critical areas
- Often leads to deeper engagement with a company, including financial support and other volunteer support

# Skills-based examples and outcomes



- Process-improvement project
- Marketing and branding project
- Human resources project

# **BEST PRACTICES IN ADDRESSING CHALLENGES**

What makes managing skills-based projects unique from skilled opportunities or general volunteering?

# Common challenges

Source: Taproot Foundation



## Skills Based Statistics

- **75%** of nonprofit applicants have unrealistic or unclear expectations of scope of work or resources needed internally to complete and implement a skills based project
- **30%** of business professionals don't accurately self-identify the role they can play on a project
- **65%** of projects have a potentially fatal challenge at some point in the process that requires intervention

# Overcoming challenges



- Utilize an effective process for scoping the project, seek feedback from volunteers or professionals
- Agree and commit to a strong scope of work and set reporting expectations
  - Specific actions
  - Deadlines or timelines
  - Identifying budget needs
  - Voicing assumptions or concerns
  - Create a process for handling conflict or failure to meet expectations—for all parties



# Overcoming challenges: basic best practices in volunteer management



Understand where your volunteer program is at:

- 1) Do you have policies/procedures that govern working with volunteers?
- 2) Do all staff receive training on how to work with/manage volunteers?
- 3) Are staff and volunteers held accountable for accomplishing work?
- 4) How do you address poor performance or not meeting expectations for both staff and volunteers?
- 5) What grievance or conflict management procedures do you utilize?

# Organizational challenge: culture of volunteer engagement



Cultural readiness is important too!

If you already engage best practices in volunteer management, how is your organizational culture toward volunteers?

- Are there concerns about volunteers “taking” a staff member’s job?
- Do staff complain that they could accomplish more without volunteers? Do staff see them as a burden?
- Are all staff members open to working closely with volunteers on projects?

# SCOPING PROJECTS AND BUILDING CAPACITY

# Project scoping tools and steps



- 1) Brainstorm/generate ideas for projects
- 2) Formalize concrete ideas from the brainstorm
- 3) Prioritize the projects
- 4) Scope and manage one project at a time
- 5) Recruiting qualified volunteers
- 6) Agreeing to a final scope of work

# Project management steps and tools



- Keep the scope of work updated and ensure continued agreement when changes are made
- Monthly or bi-monthly reporting
- Accountability for project deadlines and deliverables
- Follow-up on challenges and acknowledge successes
- Measure final outcomes
- Celebrate project completion

# Measurements and Outcomes



Why track outcomes?

Measures suggested:

- Output: hours served (staff and volunteer)
- Output: hours saved
- Outcome: total in-kind donation
- Outcome: return on volunteer investment

What else might you track?

# Wrap-up!



## Key takeaways:

- 1) Skills-based volunteering is a valuable way to build capacity and partnerships.
- 2) Managing skills-based projects presents unique challenges that should be considered.
- 3) Volunteer management best practices and organizational culture can impact the effectiveness of a skills-based volunteer project.
- 4) Scoping the project and managing it by holding all parties accountable and communicating regularly will result in a more positive outcome.
- 5) Track and measure your results to share with the volunteers, staff and donors.



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Thanks!



## Skills-Based Volunteer Project: Immediate need project plan



**Agency:** \_\_\_\_\_

The purpose of this project plan is to assist an organizations immediate need for a new skills-based project. In circumstances where an agency is unable to perform a complete assessment process with United Way of Central Indiana, it is recommended that the following items be addressed in planning the project and marketing the opportunity to prospective volunteers. This project plan is only to be used in specific situations, with the pre-approval from the United Way of Central Indiana.

### **What is a skills-based project?**

Prior to approaching this project plan, please discuss with your organization, the purpose of scope of a skills-based project. Most volunteer projects require skills, but not all projects are skills-based. If the project you are discussing falls into one of these categories, then it should be either be re-evaluated for a general volunteer opportunity, and does not require the completion of this project plan, or it should be cancelled (example 4):

- 1) The project is ongoing, with no definitely end-date or clear deliverables.  
Ex: Preparing or cooking meals for clients each week.
- 2) The project does not require specialized knowledge.  
Ex: Planning the annual volunteer luncheon.
- 3) The project could be done by a volunteer trained by a staff member.  
Ex: Advocating on behalf of legislation that would benefit the organization's clients.
- 4) The project replaces a paid-staff member or is performing something that has strictly been considered a staff function. *Warning: volunteers should never replace staff!*  
Ex: Replacing the finance manager who left the organization.

Basic skills based guidelines to discuss in the organization:

- 1) How will this project improve our capacity?
- 2) How much effort will be required of a volunteer to complete the project?
- 3) How long will this project take to complete?
- 4) How complex is this project? Does it require follow-up projects?
- 5) What are the budgetary concerns and resources needed to complete the project?

In general, United Way of Central Indiana recommends skills-based projects that significantly increase capacity, that are fairly simple to complete, that have a well-defined and reasonable timeline, that are not complex and can stand alone, and are low-cost and involve few resources. Experience and research tells us that these are the types of projects that are the most successful. If your project does not meet these guidelines, it is recommended that the organization re-examine the scope of the project and evaluate how it can align with our project guidelines.

Please note that because the organization has identified an immediate need for this project and determined that it cannot wait for a skills-based assessment, the organization should still work with United Way of Central Indiana to complete an assessment in the future. Not all projects submitted using the project plan will be approved for skills-based volunteers. Please contact us if you have questions.

## Project plan

**Project Title:** One sentence that uniquely defines and identifies the project.

**Departments Involved:** Organization departments and managers involved.

**Tasks to accomplish:** Clearly define the purpose and scope of the project. What is the project intended to accomplish? How will you define success? Why is the project needed? Include the justification for consideration of this project.

**Project Goals:** Use the table below to describe the specific goals that the staff member will measure and track.

Goals	Measureable success factors the department/project manager will track
Goal 1	
Goal 2	
Goal 3	

**Volunteer Skills Needed:** Specific skills required to complete the project.

**Estimated Project Timeline:** Overall expected timeline for start and end of project.

**Project Budget Needs:** Funds or resources needed to complete the project, and who will be responsible for acquiring them for the project.

**Expected Project Deliverables:** Please use this table to describe specific items to be developed and the potential due dates if there are intermediary steps for completion other than the final timeline date.

Product	Deadline

**Volunteer Support and Feedback:** Please briefly describe how you will provide prepare the volunteer for the project, and use the table below to describe what communications will be shared with the volunteer regarding the status of the project.

Team Member Responsible	Project status communication	Deadline/Frequency	Who Receives
<i>Vol name</i>	Monthly Report	1st of month	Volunteer & staff member
<i>Department and staff member involved</i>			Staff member & volunteer
<i>Volunteer manager</i>			

### Things to Consider

United Way of Central Indiana scopes skills-based projects and connects agencies with professionals interested in skills-based volunteering. It is important to reflect on the immediacy of the project, and whether it would be best to proceed with a skills-based assessment instead of this basic project plan. If you have questions, please contact us at the information below. In addition to the considerations above, please also review and discuss these questions with the key-players in this project.

- 1) Does the staff member managing the project feel comfortable with the plan?
- 2) Is this the right time to undertake the project? Are the necessary resources and funding available? Are the right staff available to support the project?
- 3) Is the organization's leadership team fully supportive of this project?
- 4) Is the project scope realistic? Could it be broken down into smaller pieces? Would accomplishing some of it still benefit the organization?
- 5) What is the current state of this activity? What have you done to date?

**Risks:** Anything that may cause delay or block successful project completion. "If (condition occurs) by (timeframe or date), then (consequence to the project)."

- Risk 1: If...by...then.
- Risk 2:
- Risk 3:

## Questions?

Please contact:  
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Manager, Skills-Based Volunteering and HoosierCorps  
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[Rachael.candee@uwci.org](mailto:Rachael.candee@uwci.org)  
3901 N Meridian St  
Indianapolis, IN 46208

## Skills-Based Volunteering

The Volunteer Center at the United Way of Central Indiana facilitates a skills-based model for central Indiana volunteers, businesses, non-profits and other organizations/programs. The model focuses on strategically matching corporations, teams or individuals with organizations to fully leverage the skills of volunteers.

This program builds organizational capacity and tremendous volunteer impact. This program can complement existing skills-based volunteer utilization, is easily scalable, and can be customized for each organization, corporation, team or volunteer.

The skills-based volunteerism program strategically helps agencies fulfill their missions through consultative services and the integration of skills-based, pro bono, and subject matter expert volunteers. Individuals as well as project teams will be engaged to volunteer or donate pro bono time in order to address critical non-profit needs.

Typical projects might fall within these professional skill areas:

- Accounting/Finance
- Advertising/Public Relations
- Creative Services
- Human Resources
- Information Technology
- Health Care
- Legal Services
- Education
- Engineering/Science
- Construction
- Translation
- Marketing/Sales
- Operations/Facilities
- Product Development
- Customer Care

Each group will benefit from participation in the program.

Volunteer Benefits	Corporation Benefits	Non-Profit Benefits
<ul style="list-style-type: none"> <li>• Utilize skills to help improve community</li> <li>• Develop or hone professional skills</li> <li>• Access to Volunteering as a Career Builder training</li> <li>• Networking opportunities</li> <li>• More meaningful connection to community need</li> </ul>	<ul style="list-style-type: none"> <li>• Stronger return on investment</li> <li>• Enhanced employee morale</li> <li>• Positive public image</li> <li>• Strengthened community relations</li> <li>• Employee skill development</li> <li>• Increased awareness of and respect for diversity</li> </ul>	<ul style="list-style-type: none"> <li>• Increased capacity to fulfill mission</li> <li>• Potential budget savings</li> <li>• Diversified volunteer base</li> <li>• Increased visibility in the community</li> <li>• Volunteers become ambassadors for agency</li> </ul>

If you are interested in participating in the skills-based volunteering program, contact the United Way Volunteer Center for an application form. Upon receipt of your application, Volunteer Center staff will schedule a time to meet with you. Agencies will undergo an assessment to identify project needs and define work scope. Individual volunteers will be screened for particular needed skills. Corporations will be reviewed for what skills and time commitments can be made.

For more information, contact:

Rachael Candee, Manager, Skills-based Volunteering & HoosierCorps

[rachael.candee@uwci.org](mailto:rachael.candee@uwci.org)

317-921-1303



## Skills-Based Project Charter

The project definition and scope of a volunteer project is intended to gather information that will help the volunteer and the nonprofit organization to clarify and articulate the assignment's purposes, givens, constraints, assumptions, scope (who is included and time frame), and potential additional resource requirements.

**Project Title:**

**Project Team Members:**

Entity Name	Team Member	Phone	Email	Responsibilities*
<i>Non-Profit</i>				
<i>Business/Team</i>				
UWCI				

\*Designate entity/person responsible for maintaining charter statement and team lead.

**Departments Involved:**

**Volunteer Skills Needed** (*Technical, Interpersonal, Specific/Skills, Experience, Talent*):

**Estimated Project Timeline:** General timeline of the project. Start date, end date, and interim milestones, if desired. Consider key deliverables and volunteer availability.

**Project Budget Needs:** Include amount budgeted for the project, and who is responsible for each expense.

**Project Goals:** Itemize specific and measurable success factors the project team will track.

- Goal 1:
  
- Goal 2:
  
- Goal 3:

**Detailed Description:** Clearly define the purpose and scope of the project. What is the project intended to accomplish? How will you define success? Why is the project needed? Include the justification for consideration of this project.

**Key Deliverables:** Finished products (such as quantities of printed materials) or templates to be used by the organization to produce materials at their own cost?

Product	Deadline

**Assumptions:** What are key expectations that will occur as a result of the project? .

**Benchmarks:** Major activities and deadlines that support key deliverables.

**Resources:** What resources (materials, budget, etc.) will each entity/person provide?

Business/Team:

Non-Profit Organization:



**Communication Plan:** Who is involved in project status updates and reporting? How will you communicate the process, work, and outcomes to engage volunteers? Include escalation contacts for issues that cannot be resolved.

Team Member Responsible	Required Report	Deadline/Frequency	Who Receives
<i>Vol name</i>	Monthly Report	1st of month	<i>Rachael &amp; agency rep</i>
<i>Agency rep</i>			<i>Rachael &amp; vols</i>

This contract may be amended only in writing with the mutual consent of the parties.

This contract may be terminated with 30 days notice by either party.

**United Way of Central Indiana**

Print Name \_\_\_\_\_

Title \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

**Business/Team Lead**

Print Name \_\_\_\_\_

Title \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

**Non-Profit Lead**

Print Name \_\_\_\_\_

Title \_\_\_\_\_

Signature \_\_\_\_\_

Date \_\_\_\_\_

