

How nonprofits can recruit and manage Skilled Volunteers




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Questions Non Profit Directors should ask about Marketing and Fundraising

Complimentary white paper for all Non-profit Board members:

What are the questions that you need to ask to be an effective Board member? How do you make sure you get the answers you need to make good decisions? This white paper uses everyday language (no jargon) and explains the overlap between marketing and fundraising. Read it and pass along to all nonprofit boards that need help.



Skilled Volunteers Part 1

Part 1

How nonprofits can recruit and manage Skilled Volunteers



How nonprofits can recruit and manage Skilled Volunteers:

A skilled volunteer is a volunteer who helps management with specific expertise e.g. HR, strategy, marketing. Skilled volunteers fill a gap and bring an outside perspective. Read this booklet to access skills, pro bono, from professionals in your neighbourhood.

Skilled Volunteers Part 2

Part 2

Orientation for Skilled Volunteers:



Skilled Volunteers:

- professional specific expertise
- help management

Why?

- expertise that fills a gap
- short term
- unbiased third party
- outside perspective

✗ consultant
✓ treat us



✓ volunteer
✗ treat us



Skilled
volunteer

Roles for Skilled Volunteers

- Board member
- ✓ Subcommittee member
- ✓ One-time project

Agenda

1. When do you need us?
2. Where to find us?
3. How to manage us?

When do you need us?

When things
are not
going well

MAS requests

Strategy and meeting facilitation	30%
Governance and board development	25%
Marketing and fundraising	20%
HR	10%
Other	15%

Typical governance projects:

Assessments, explain governance models 45%

Board orientation workshop 40%

Tips to incorporate startups 15%

Tips to apply for charitable designation 10%

Common Governance Problems

☐ Lack of understanding of Director responsibility

- Do members understand governance responsibilities & role of the Board?
- Do members prepare for and participate in meetings?
- Does the job description include a commitment to fundraising?
- Does the board over-manage staff?

☐ Lack of variety of skills

- Do you recruit on broad selection criteria eg expertise, connections, life experience?
- Are members comfortable being ambassadors?

☐ Unwillingness of staff to let Board function

- Is your Chair a strong leader?
- Do you meet without ED to discuss performance?

☐ Lack of time commitment

- Are time commitments clear when you recruit?
- Do members hold each other accountable?

☐ Lack of balance between external activities (e.g. fundraising) and internal activities (e.g. strategic direction and policy formation)

- Do your agendas include both?
- Do you have an effective committee structure?
- Does the Board interface with key stakeholders?

☐ Reluctance of Directors to gain sufficient in-depth knowledge of the mission and operations

- Does your orientation educate fully?
- Do Directors have opportunities for ongoing development?

For help to solve your governance problems, contact MAS:

416-963-5792

www.masadvise.org



1. Free download

2. Give to Board

Typical marketing projects:

✗ website
✗ logo

problem or
symptom ?

✓ messaging

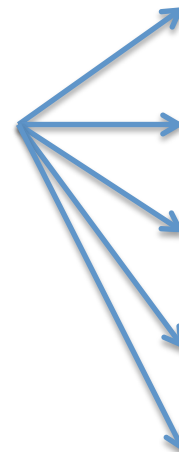
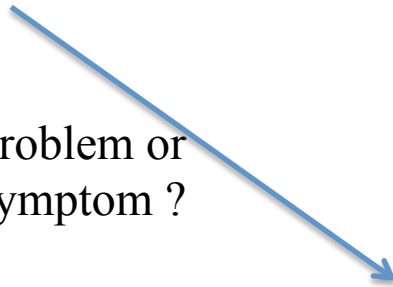
Website

Elevator speeches

Brochures

Donor letters

Donor presentations



Typical fundraising projects:

Mid size:

- Lack of revenue diversity
- Over-reliance on event revenue
- Same every year
- Desire for a



Small:

Eager volunteers
No structure
No experience



Annual fundraising plan

Typical HR projects:

HR policies and practices	50%
Workshops (trust, goal setting, interviewing)	20%
HR administration (benefits, job descriptions, manuals)	15%
Executive coaching	15%

More problems when transitioning between life stages

www.speakmanconsulting.com



Nonprofit Organizational Life Cycle

	Grass Roots - Invention	Start-Up - Incubation	Adolescent – Growing	Mature - Sustainability	Stagnation & Renewal	Decline And Shut-Down
Program And Services	<ul style="list-style-type: none"> Extremely informal or not yet a concern Perceived need for a program or service 	<ul style="list-style-type: none"> Simple programs are initiated or a mix of diverse and non-integrated activities. Strong commitment to delivering services 	<ul style="list-style-type: none"> Programs begin to establish themselves in the market Often demand is greater than capacity More consistent program delivery More focus 	<ul style="list-style-type: none"> Core programs are established and recognized in the community Long range program planning New programs are added & deleted as market dictates Programs functioning well 	<ul style="list-style-type: none"> Organization loses sight of market Programs developed primarily to attract funding Difficulty in delivering services and reaching goals Inconsistent program quality 	<ul style="list-style-type: none"> No longer meeting market needs Loss of credibility with funders and clients Decline in product quality Major reduction in referrals Licensing or accreditation in jeopardy
Staff Leadership/ Management	<ul style="list-style-type: none"> Entrepreneurial and visionary leader 	<ul style="list-style-type: none"> Single minded founder whose vision drives the organization Sole decision making - little or no hierarchy 	<ul style="list-style-type: none"> Beginning strategic division of labor Executive Director still primary decision maker and is less accessible to staff Both external and internal demands 	<ul style="list-style-type: none"> Need for well-rounded Executive Director Sometimes 'Founder's Syndrome' Delegation of authority and clear accountability 	<ul style="list-style-type: none"> Founder likely to leave Change agent needed 	<ul style="list-style-type: none"> Major conflict between ED and board ED makes key decisions w/out board ED is inaccessible and unable to meet deadlines
Staffing	<ul style="list-style-type: none"> All volunteer driven No paid staff 	<ul style="list-style-type: none"> Most work completed by volunteers Small (if any), enthusiastic staff Sense of "family" and cooperation among staff 	<ul style="list-style-type: none"> Staff size increases – still join primarily for mission Deepening organization chart, with more centralized management No job descriptions & personnel policies 	<ul style="list-style-type: none"> Even larger, and more culturally diverse and specialized staff Professional managers are hired Vertical, hierarchical organization chart 	<ul style="list-style-type: none"> Low staff morale; staff turnover Focus is on individual programs, instead of organizational goals Fiefdoms develop Volunteers leave 	<ul style="list-style-type: none"> Departure of key staff Key positions difficult to fill Staff grievances bypass ED to board High conflict among staff Low # of volunteers
Governance/ Board	<ul style="list-style-type: none"> Not yet a real concern 	<ul style="list-style-type: none"> Formal governance structure in place Small, passionate, and homogenous board Members tend to be volunteers or hand-chosen by executive 	<ul style="list-style-type: none"> Board expansion – first 'outsiders' New board members are added who are professionals with expertise Less focus on operations, more on 	<ul style="list-style-type: none"> Board size and diversity increases Main function is policy and oversight Fundraising becomes a more important role Good committee structure – most work 	<ul style="list-style-type: none"> No or very high board turnover Sluggish and less involved Bogged down in structure that may be outdated 	<ul style="list-style-type: none"> Very low board attendance No new board members Key board members may leave Eventually dissolves itself

1. Free download
2. Give to Board

Diagnose and triage

- What a nonprofit asks for is not necessarily what they need
- MAS 1/3 of my clients accurately self-diagnose

Nonprofit asks ...

“Spokesperson training”

“We need more donors”

You discover...

no clear messages

acquisition or retention

Hierarchy of needs

1. Governance
2. Strategy
3. HR
4. Marketing
5. Fundraising

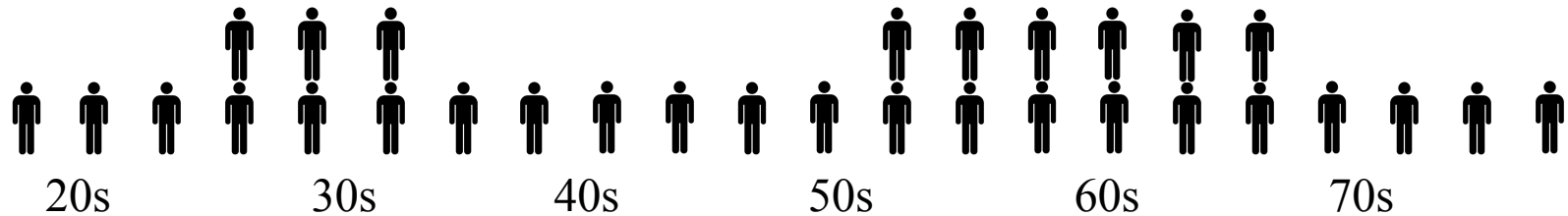
Agenda

✓ When do you need us?

➔ Where to find us?

How to manage us?

Pro bono consulting



University

Community
Colleges

Endeavour

- strategy
- 12 proj/year
- 200hrs/proj
- team
- 8 years

Consulting
firms

MAS

- strategy, governance, HR, marketing, fundraising, IT, executive coach, finance
- 200 projects/year
- 25 hours/project
- individual
- 20 years

Pop-ups

Social Venture Partners

Other charities: Calgary, US, Switzerland



Unemployed professionals who want to fill a gap in their resume



For-profit consultants who want to build their portfolio

Recruit individuals

Circulate volunteer job description to:

- volunteer postings online (Volunteer Toronto, Charity Village)
- Post on LinkedIn (or search for skill or experience you need)
- your own website and Facebook
- your Board of Directors to forward to their connections
- local companies with a large head office
 - ask if they would donate the time of staff
 - circulate internally to find an employee who will volunteer on their own time
- local consulting firm for pro bono help to build their portfolio
- local universities and community colleges – alumni or business professors may have local contacts.



What to look for in any Skilled Volunteer

Soft skills:

- listening skills
- focuses on your needs
- uses language that you can understand
- spirit of collaboration
- fresh perspective
- available time

How to pay in ways other than money

Understand what's in it for them

Recent graduates:

- build their resume
- apply their education to a new industry
- learn how to be a consultant

Others will want to:

- volunteer, but fear doing mundane assignments
- fill time with meaningful, part-time work
- see the difference they can make

Agenda

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2. Where to find us?
3. How to manage us?

How to manage

1. Clarify your expectations



2. Finish with a close form.



Tips to prepare you

- Orient your volunteer
- Approach from a position of strength
- Don't expect professionals will be emotionally tied to your cause.
- Don't expect professionals will want to be Board members
- Expect professionals to work faster
- Sensitize your employees to for-profit language

Tips for HR projects

- Help adjust expectations
- Establish upfront the depth of the work needed

Tips for strategy projects

- There are as many ways of doing strategic planning as there are strategic planners
- Provide background information
- The Board must be engaged early in the process

Tips for marketing projects

- Good marketing is deceptively hard
- Marketers are generalists OR specialists
- Distinction between marketing and fundraising
- Select carefully the other employees who will work with the marketer

When to walk away

- Hesitation about the project
- Hesitation about volunteer
- Not right for volunteer
- Overwhelming
- Chemistry
- No staff assigned

What to expect

- Expect that no one in a small nonprofit will understand the fundamental principles of each profession
- Expect resistance
- Nonprofits may not know how to manage volunteer

Our mission = build capacity
in the non profit sector.

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