Skills-Based Volunteering: A Discussion Paper

Anna Maranta and
Paula Speevak Sladowski
Carleton University
Centre for Voluntary Sector
Research and Development

FOREWORD

Purpose and Objectives:
The purpose of the discussion paper is to provide the context for skills-based volunteering by exploring the evolution of volunteerism and models of volunteer engagement. The objectives are:

1. To provide a framework for discussion about the policy and practical implications of skills-based volunteer engagement
2. To serve as a springboard for the development of programs, tools, resources, and policies that support organisations in skills-based volunteer engagement

Audiences:
This paper is designed to inform and support decision-making among those working in a variety of roles in the public, private, and non-profit and voluntary sector including:

- Volunteers
- Executive Directors, Board Chairs, CEO's of volunteer-involving organisations
- Managers of Volunteer Resources (Co-ordinators of Volunteers) of organisations
- Leadership/Intermediary organisations (networks, councils, coalitions)
- Policy Makers and Funders
- Volunteer Centres
- Educational Institutions
- Organized Labour
- Corporate Community Investment Directors
- Small Businesses

Programs and Voluntary Sector Relations, and to Ruth MacKenzie, President and CEO, of Volunteer Canada, for their leadership on this project and thoughtful review of early drafts of this paper.

We hope that this paper will stimulate discussions regarding responses to the changing culture of volunteerism, and new approaches to organizational sustainability. We imagine animated conversations in a variety of settings; around board room tables, in workshops, at strategic policy sessions, in class rooms, and in coffee shops.

Centre for Voluntary Sector Research and Development,

Carleton University, Ottawa, May 2010.

INTRODUCTION

Volunteering continues to be fundamental to Canadian society with more than 12 million volunteers contributing more than 2.1 billion hours of service each year.[1] Volunteering builds and strengthens relationships within local communities, contributes to population health and provides a sense of fulfillment and wellbeing to active citizens. Significant shifts in (a) the demographics and characteristics of today's volunteers, (b) changes in the nature of the non-profit and voluntary sector, and (c) the evolution of volunteer resource management practices, have given rise to a new focus on ***skills-based volunteer engagement***. This shift in focus will support the sustainability of organisations as they engage people (paid and unpaid) based on the skills they have to offer.

a) Demographics, Characteristics, and Societal Trends:

There has been growing interest among market researchers, academics, and non-profit and voluntary sector leadership in understanding the characteristics and decision-making factors for people from various cohorts and generations, including Baby boomers, Generation X & Y, and new Canadians. While there are differences in these cohorts in terms of their specific motivations and personal goals, when combined with overall societal trends, the following 6 common characteristics of today's volunteer emerges:

1. **Highly Educated** with professional backgrounds
2. **Goal-Oriented** with highly organized career , family, and social lives
3. **Sense of Mobility**/Transient in terms of residence, school, and work
4. **Technologically Skilled** and comfortable participating in social networks
5. **Individualistic** and have a strong desire for autonomy
6. **Multiple Interests and Identities** linked to many communities and causes

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[1] This survey included adults that were performing mandatory community service. Imagine Canada. CARING CANADIANS, INVOLVED CANADIANS: HIGHLIGHTS FROM THE 2007 CANADA SURVEY OF GIVING, VOLUNTEERING AND PARTICIPATING/CANADIENS DÉVOUÉS, CANADIENS ENGAGES: POINTS SAILLANTS DE L'ENQUETE CANADIENNE DE 2007 SUR LE DON, LE BENEVOLAT ET LA PARTICIPATION. 2009. 94 pp. ISBN 978-1-100-11864-2 (Internet) p. 10

The culture of volunteering is changing. In the past, many volunteers provided direct service or administrative support; board members provided organisational leadership and consultants (either paid or volunteer) provided specific expertise when needed. Volunteer engagement was less focused on specific skills or training, and more on passions and availability.

b) **Changing Nature of the Non-Profit and Voluntary Sector:**

Major investments have been made by the federal government, over the past decade, in research activities that enhance our understanding of the nature and scope of the non-profit and voluntary sector. These studies have consistently illuminated the following:
- The majority of incorporated non-profit organisations have a local mandate
- Two thirds have budgets less than $100,000 per year
- Approximately half are entirely volunteer managed and staffed
- Core, multi-year funding to organisations has been phased out by most funders
- Short-term, project/program funding is more common
- Emphasis on impact, performance measurements, and results-based management
- Challenges recruiting leadership and governance volunteers
- A focus on risk, liability and accountability

The rapid increase in the use of technology in the last decade has also profoundly affected the sector. Together with the advent of social marketing tools such as Facebook, new [micro-] non-profit and charitable causes and organisations can be rapidly developed to respond to changing social issues and needs.

An increased recognition of the reciprocal relationship between volunteers and the organisations they serve has also been noted. Increased efforts are being made to better meet the needs of volunteers while at the same time volunteers are seeking more meaningful ways to engage in volunteerism.

c) **The Evolution of the Volunteer Resource Management:**

During the 1990's, there was tremendous movement towards the professionalisation of the volunteer resource management practices with the establishment of professional accreditation programs through associations, certificates through community colleges, and sector-wide standards of practice, leading to the Canadian Code for Volunteer Involvement.[2] While this specialisation was important to understand the unique dimensions of management volunteer programs, in recent years, there has been a thrust to look at them within the context of integrated human resource management.

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[2]. CANADIAN CODE FOR VOLUNTEER INVOLVEMENT. Volunteer Canada. Available online from: http://creatrixdesigngroup.ca/node/44

The evolution of volunteer resource management practices contributed to a new or renewed focus on the implicit needs and interests of volunteers. While volunteers offer their time to improve the lives of others or to contribute to the vitality of their communities, having their individual motivations and criteria for volunteering met does not negate the generosity inherent in their volunteer activities. It is the balancing of meeting the goals of volunteers and meeting the goals of the organisation or community that has characterised the evolution of volunteer management in the past twenty years.

By understanding, accepting, and responding to the needs and interests of prospective volunteers, organisations become aware of the benefits they provide, not only to the clients, members, participants of their programs and services, and the organisation's infrastructure but to the volunteers themselves. Whether we are talking about more intangible benefits such as finding greater meaning in their lives, raised self-esteem, satisfaction in helping someone, or more concrete benefits such as work references, skills and language development, or meeting the criteria for school applications, the reciprocity of volunteering has increasingly become accepted and is forming the basis for developing recruitment and retention strategies.

Regardless of where the responsibility for supporting volunteer efforts is situated within an organisation, understanding how volunteers seek out and respond to volunteer opportunities is essential. A variety of "search lenses" have been identified which help to explain why people volunteer.[3] We have selected the following six lenses as a working model for this paper, in order to better understand skills-based volunteer engagement.

- Personal Goals/Motivations
- Location
- People Served
- Sub-Sector/Type of Organisation
- Issue or Situation
- **Skills**

In most cases volunteers search out voluntary activity using multiple lenses, although one lens is primary. The focus of this paper is on those volunteers using this last lens, *skills*, as their primary lens through which they seek volunteer work. Conversely, many organisations are beginning with the skills lens when engaging staff and volunteers.

From a review of the available literature it appears that in the United States this approach to engaging volunteers is rapidly becoming the aspired normative; in recent years volunteer brokerage services, pro bono think tanks and other similar organisations have developed to both respond to and drive this shift. UK-based research suggests that awareness of the availability of this form of non-financial support or "support-in-kind" has only begun to develop in the last few years.[4] Australia seems to have adopted the

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[3] Imagine Canada. CARING CANADIANS, INVOLVED CANADIANS: HIGHLIGHTS FROM THE 2007 CANADA SURVEY OF GIVING, VOLUNTEERING AND PARTICIPATING/ CANADIENS DÉVOUÉS, CANADIENS ENGAGES: POINTS SAILLANTS DE L'ENQUETE CANADIENNE DE 2007 SUR LE DON, LE BENEVOLAT ET LA PARTICIPATION. ISBN 978-1-100-11864-2 (Internet). p. 48. Accessed on February 21, 2010 from http://www.givingandvolunteering.ca/files/giving/en/csgvp_highlights_2007.pdf .
[4] p. 10. Alan Eagle, Lisa Parker and Rob Jackson. DEVELOPING UNDERSTANDING

concept of skills-based volunteer engagement within the framework of employer-supported volunteerism. However, at the time of this writing this appears to be less a deliberate strategy than a response to requests from nonprofit organisations for more strategic, skills-based volunteer time.[5]

In 2007, Volunteer Vancouver noted that "as a matter of public policy . . . we in Canada pay the least attention to volunteering of almost all developed Western countries." They further reported that the changing culture of volunteerism ". . . [potentially has] serious implications for not-for-profits' capacity to continue to meet their missions. Most not-for-profit organisations are either oblivious to, or ignoring, the problem."[6] To address this challenge the organisation released a new book in June 2009, *A People Lens: 101 Ways to Move Your Organization Forward*, a collection of stories and role suggestions, designed to inspire leaders in the voluntary sector to change the way they think about engaging volunteers with their organisation, suggesting that "this approach recognizes the changing face of available talent, and enables not-for-profit leaders to create and grow values-based, effective, sustainable and dynamic organizations".[7]

In addition to the changes in the culture of volunteerism that are driving this shift in focus, the economic downtown has become a motivating factor for the private sector to change their focus from giving monetary donations to providing intellectual capital through employer-supported volunteer initiatives. Recent research suggests that nonprofit organisations could reduce their operational costs significantly, and gain considerable capacity-building resources if they shifted their focus to soliciting pro bono and skilled volunteer support rather than soliciting monetary donations.[8] As awareness of the availability of such non-financial support from corporations is only in the early stages, charitable and nonprofit organisations are still challenged on how to identify and source opportunities to engage skills-based volunteers, particularly through employer-supported volunteer initiatives; navigate the application process, if required; and develop and maintain ongoing relationships with small business as well as multi-national corporations.[9]

AROUND NON-FINANCIAL SUPPORT. London: The Smart Company. Summer 2007. 36 pp.
http://www.nationwidefoundation.org.uk/NFS_report_08.pdf   accessed on March 3, 2010.

[5] See notes about the report on GLOBAL TRENDS IN SKILLS-BASED VOLUNTEERING. (Allen Consulting Group.2007.) accessed on March 3, 2010 from http://www.probonoaustralia.com.au/news/2007/05/global-trends-skill-based-volunteering-nab-report

[6] Volunteer Vancouver. "Volunteerism today – Does anyone really care? Exclusive Interview with Linda L. Graff." Vantage Point, August 27 2007.   Accessed on March 1, 2010 from
http://weinspireandbuildleadership.ca/vantagepoint/2007-10/volunteerism-today.html

[7] p. 2. Vantage Point. A PEOPLE LENS" 101 WAYS TO MOVE YOUR ORGANIZATION FORWARD. 2009. Available for purchase online at http://www.volunteervancouver.ca/content/people-lens

[8] Based on their 2009 Volunteer IMPACT Survey, Deloitte noted that "Despite the challenging economic backdrop, nearly 40 percent of nonprofit executives say they will spend between $50,000 and $250,000 or more of "hard-won" cash on outside contractors and consultants this year." They suggest that pro bono and skilled volunteer support could offset such costs in addition to addressing the decline in corporate giving dollars. i.e. rather than soliciting donations, nonprofit organisations could engage volunteers to meet their needs for skills and expertise. See: http://www.deloitte.com/view/en_US/us/press/Press-Releases/press-release/3f7afd0057101210VgnVCM100000ba42f00aRCRD.htm

[9] p. 10. Alan Eagle, Lisa Parker and Rob Jackson. DEVELOPING UNDERSTANDING
AROUND NON-FINANCIAL SUPPORT. London: The Smart Company. Summer 2007. 36 pp.
http://www.nationwidefoundation.org.uk/NFS_report_08.pdf   accessed on March 3, 2010.

Primarily directed at the nonprofit and voluntary sector, this paper will address the ways organisations need to adapt how they recruit, integrate, manage and retain these more highly skilled volunteers including the way they market their organisation to this specific group of volunteers.

We will introduce the concept of skills-based volunteerism which has been defined in the literature to mean service to nonprofit organisations by individuals or groups that capitalises on personal talents or core business or professional skills, experience or education for the purpose of building organisational strength and increasing capacity.[10]

We will then identify how a skills-based volunteer engagement strategy will add value to an organisation's ability to deliver its mission, discuss some of the policy and practical implications, and briefly outline some of the benefits and challenges of this approach to engaging volunteers. A series of steps is proposed for initiating a Skills-based Volunteer Strategy in a charitable or nonprofit organisation.

The paper will also briefly address the increasing focus on skills-based volunteering through employer-supported volunteer initiatives (ESVI) including support for nonprofit board membership and pro bono volunteer programs. We will also address the concept of an integrated human resources strategy.

Finally, this paper will identify, where available, "promising practices" related to the development of programs, tools, resources, and policies that support organisations in skills-based volunteer engagement, and suggest areas for further research and development.

> **Promising Practice – Program**
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> ***Power of Partnership*** is an annual event sponsored by ProHelp, a UK-based organisation that provides an opportunity for community groups to gain support from the business community for their projects. It features a series of workshops, seminars, displays, and advice sessions, enabling business and community groups to meet face-to-face, establish friendships, and working partnerships. A short video is available describing the event.
>
> *For more information: http://www.bitc.org.uk/community/employee_volunteering/prohelp/prohelp_video_2.html*

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[10] Adapted from Points of Light Institute website, http://www.pointsoflight.org/our-work/research/sbv accessed on February 9, 2010.

A Model of Volunteer Engagement

As identified above, individuals engage in the voluntary sector based on a variety of search lenses. In order to better understand how individuals seek out voluntary activities or placements, we highlight six lenses including the skills lens on which this paper is focused.

1. Personal Goals or Motivations: People are motivated to volunteer for a range of personal goals, including:
   - o Helping others
   - o Improving language skills
   - o Exploring career options
   - o Gaining work experience
   - o Satisfying school graduation or admissions criteria
   - o Making social contacts
   - o Networking for business
   - o Building a resume
   - o Raising Self-Esteem
   - o Retirement Planning

2. Location: With increased attention to place-based decision-making and citizen engagement, many people are becoming involved in their local neighbourhoods, and communities, to participate in planning and supporting programs and services. Some of these "grassroots volunteers" are engaging in voluntary activities spontaneously in response to the perceived need, without any formal structure i.e. job descriptions, risk management policies, etc. For some, the time, costs, and energy required to travel to volunteer sites is an important consideration in choosing

volunteer work; while for others, their focus is on safety and other environmental factors that are present in the neighbourhood and immediate surroundings.

3. <u>People Served:</u> Family history or personal preferences often make people more inclined to want to work with a particular population such as youth, frail elderly, children, people with disabilities, or those without housing. Ethnicity or heritage may also bridge people to particular organisations.

4. <u>Organisation/Sub-Sector:</u> Our passions vary depending upon our life experiences, professional backgrounds, or personal priorities and this may influence the types of organisations or the sub-sector with which we want to volunteer (i.e. literacy, human rights, social services, recreation, arts and culture …)

5. <u>Issue/Situation:</u> When a particular public policy issue arises, such as same-sex marriage, municipal restructuring, parental leave benefits or a natural disaster or health emergency occurs, many people are willing to respond to calls for help or efforts to mobilize citizens.

6. **<u>Skills</u>**: Those who focus on the skills component of a volunteer opportunity are either people who already have professional skills or specific talents they wish to share or those who want to refine or strengthen these skills through the experience.

As noted in the introduction, these lenses are not mutually exclusive, although one is often primary. Above all, volunteers want to know that they have made a difference, that the time and talents they have invested were appreciated. In the remainder of this paper we will focus on volunteers using this last lens as their primary filter through which they choose to engage in the voluntary sector. Our primary focus will be on sector-based responses to volunteers seeking to engage in volunteering through this lens.

Skills-based volunteerism

What is skills-based volunteerism?

For the purposes of this paper, skills-based volunteering is defined as service to nonprofit organisations by individuals or groups that capitalises on personal talents or core business or professional skills, experience or education, often for the purpose of building organisational strength and increasing capacity.[11] It is one component of non-financial support that the private sector can offer charitable and non-profit organisations.[12]

Examples of Skills-Based Volunteerism
The projects or tasks that highly skilled volunteers might be engaged to complete for a nonprofit organisation are highly varied. Here is a list of possibilities:

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[11] Adapted from Points of Light Institute website, http://www.pointsoflight.org/our-work/research/sbv accessed on February 9, 2010.
[12] Non-financial support may also include material donations, loans of specialised equipment, or use of space for events or on an ongoing basis, for example.

- An editor proof-reading promotional materials for an organisations fundraising campaign
- A photographer taking images of a special event, and introducing the organisation to the use of the web-based tools Flikr
- An artist designing a mural for the new entryway
- A musical group that plays at an annual fundraising gala
- A leadership coach who provides an executive director with one-on-one support
- A marketing consultant:
    o Designing a logo or brand
    o Creating templates for more effective newsletters and brochures;
    o Cultivating media contacts and obtaining free publicity for the nonprofit
- A lawyer developing the bylaws for a newly forming nonprofit organisation
- An accountant:
    o Advising a new organisation on creating a bookkeeping system
    o Developing tools and reports to monitor financial performance
    o Assistance in preparing for a financial review or audit
- A board development consultant helping the board
    o to develop or revise mission, vision and objective statements
    o create a structure for effective board meetings
    o to define roles and responsibilities
    o get involved in fund-raising

Meeting the goals of today's volunteer

As noted in the introduction to this paper, the culture of volunteerism has changed. The common characteristics that today's volunteers share requires a change in how they are engaged in the nonprofit and voluntary sector. While younger volunteers (20s and 30s) may enter the voluntary sector with motivations that are similar to traditional volunteers - the desire to make a positive difference in their communities, and to enrich their own lives - because they are juggling multiple demands on their time – paid work, family and home life commitments – they may desire increased flexibility regarding time commitments and location of their voluntary activity, they may be less interested in making long-term commitments to one organisation, or to one segment of the voluntary sector, and they may be interested in incorporating technology into their volunteer work due to their significant ease and expertise. Their commitment to their volunteer activities may be strong as they have specific personal and professional goals including the desire to acquire or strengthen specific skills, explore career options, gain work experience, and develop personal and professional networks. In periods of transition, or un/underemployment, these young professionals are likely to turn to voluntary activities to keep their skills sharp, and to develop their resume or portfolio. They are less likely to differentiate between their paid and unpaid work activities, expecting that they will readily transfer knowledge and skills from one setting to another.

Older volunteers (50+) are likely to have been engaged in the workplace for most of their adult lives, and have acquired readily transferable skills and expertise and professional designations; they also are likely to have a history of volunteerism. They are commonly known as the sandwich generation – simultaneously caring for children or grandchildren

and aging parents – leaving them with less time for volunteer activity. Many expect to be engaged in meaningful (paid or unpaid) work past the age of traditional retirement. [13]

These highly-skilled volunteers may transfer relatively high expectations from their workplace to the nonprofit organisation with which they engage including a desire for relative ease of entry into the volunteer activity; expectations related to orientation and training; well-defined lines of communication including specific reporting mechanisms; opportunities for evaluation, incentives and recognition. These volunteers may enter the voluntary sector through traditional avenues and also through employer-supported volunteer initiatives, pro bono volunteer programs, as well as following retirement, as a second career.[14]

Engaging these talented people, through well-defined, skills-focused projects will address many of their needs, and will benefit the charitable or nonprofit organisation. As noted in Vantage Point's, *A People Lens, "*Jointly vesting in strategically important projects compels volunteer/not-for-profit teams to work intensively together for success. In these circumstances people not only learn but also actively integrate new processes, systems and practices," that move the organisation forward, and, "perhaps more significantly, many on both sides of the exchange also experience a broadening of their outlooks and attitudes."[15]

Initiating a skills-based volunteer engagement strategy

To meet the needs of the changing culture of volunteerism, the nonprofit and voluntary sector has begun to respond by adjusting or shifting its focus from more generalised to more specific recruiting practices. A skills-based volunteer engagement strategy focuses on identifying the skills required to complete specific projects or tasks derived from the organisation's mission, and then recruiting individuals with these specific skills or areas of expertise.

The most likely person to implement a skills-based volunteer engagement strategy is the nonprofit organisation's manager of volunteers. Some nonprofit organisations without a designated coordinator of volunteers will need to identify the person most responsible to develop, implement and manage such as a strategy. Depending on the nature of the

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Promising Practice – Tool

**Employer supported volunteering for large companies –
A Complete Beginners Guide**
from: Volunteering England

A detailed 28 page guide designed for nonprofits considering the engagement of employer-supported volunteers. Includes readiness checklists, planning documents, and templates with many embedded links to other related sites, organisations and specific supportive documents.
The document is useful for any nonprofit wishing to engage skilled volunteers, although the links are primarily UK-specific.

*For more information:
http://www.volunteering.org.uk/NR/rdonlyres/5999CB98-270D-4E7E-AC32-93C597725A53/0/beginners_guide_vios_v2.doc*

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[13] For more information on engaging baby boomers see
http://www.taprootfoundation.org/docs/taproot_boomer.pdf
[14] One community appeals directly to those planning their retirement, or recently retired, suggesting that they consider a second career in the nonprofit sector. See p. 6. THE MYTHS AND REALITIES OF THE WORKFORCE CRUNCH IN NON-PROFITS. Calgary Chamber of Voluntary Organizations. 7 pp. Accessed February 28, 2010 from http://www.calgarycvo.org/sites/default/files/resources/HR_Myths.pdf
[15] pp. 19-20. Vantage Point. A PEOPLE LENS" 101 WAYS TO MOVE YOUR ORGANIZATION FORWARD. 2009. Available for purchase online at http://www.volunteervancouver.ca/content/people-lens

project or task, this may be members of the senior management team, including members of the Board of Directors, the Executive Director or CEO. Where the skilled or pro bono volunteer is providing specific technical or professional expertise, the person most responsible for that area of the organisation's functioning is the most likely choice. Senior management level support, especially from the executive director, is essential to successful volunteer engagement and satisfaction. *Vantage Point* suggests that the executive director **must** lead the engagement strategy for it to be successful, stating that only the ED has "the strategic acumen to create and execute this new kind of people engagement."[16]

On a cautionary note, while an organisation may have a well-defined system for volunteer engagement, including a designated person to manage volunteer resources, some professionals seeking skills-based opportunities may be more inclined to approach senior leadership, preferring to deal directly with the Executive Director, President, or Chief Executive Officer. This may be because they are already connected with them through their professional or social networks. In other cases, it is reflective of the corporate culture from which they come. This could have the unintended consequence of undermining the role of the person responsible for volunteer resources. It could also inadvertently circumvent standard volunteer management practices such as screening, selection, and ongoing supervision. Some may regard this reality as part of the new way of engaging highly skilled volunteers, allocating senior leadership time to, at a minimum, do the initial meeting, and in some cases, remain the primary contact for the volunteer. Others are cautious that this phenomenon may create an elitist stream of volunteer engagement, and actually erode the infrastructure and standards that have evolved in the field of volunteer resource management.

> **Promising Practice – Resource**
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> ***The Online Learning Center of the Corporation for National & Community Service*** offers, free, easy-to-use online courses and tools for volunteer and service programs. While US-based, many of these resources could be readily adapted to the Canadian setting.
>
> NB Registration is required to access courses.
>
> *For more information:* http://learning.nationalserviceresources.org/login/index.php

Depending on the goals and needs of the organisation, the effort and expertise required by the volunteer manager or other designate to implement a skills-based volunteer strategy will vary. There are web-based tools and courses available to guide volunteer managers or other designates to initiate a skills-based volunteer engagement strategy.[17]
Benefits and Challenges of Initiating a Skills-based Volunteer Strategy

As noted in the above discussion, volunteers have the potential to gain a lot through their voluntary activities. Nonprofit organisations benefit as well, but may also experience challenges. In determining whether an organisation is ready to initiate a skills-based approach to volunteerism it may be helpful to consider the following benefits and challenges.[18]

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[16] Personal communication, Colleen Kelly, May 18, 2010
[17] READINESS CHECKLIST FOR ENGAGING PRO BONO AND HIGHLY SKILLED VOLUNTEERS. Accessed on February 16, 2010 from
http://learning.nationalserviceresources.org/file.php/62/KnowledgeAssessment3.pdf
[18] For further information about the potential benefits and challenges of corporate support-in-kind see pp. 16-23 of Alan Eagle, Lisa Parker and Rob Jackson. DEVELOPING UNDERSTANDING

Benefits of engaging professionally or specifically skilled volunteers

1. **Increase organisational capacity** – regular paid staff are able to focus on the delivery of the services mandated in their mission while episodic or project-focused volunteers address specific needs or goals

2. **Provide specialised skills** – these volunteers may have specialised knowledge, skills and experience not present in the existing roster of volunteers

3. **Improve long-term capacity** – these volunteers may leave a legacy of increased knowledge, skills or expertise. When they are working in an advisory role they raise the level of knowledge in paid staff.

4. **Increase volunteer base** – these volunteers may wish to remain engaged with the organisation leading to a larger, stronger volunteer base; future involvement brings valuable experience

5. **Increased visibility** – when these volunteers have a positive experience with your organisation they will share this with their peer networks leveraging your organisation within the community it serves and beyond. They become the marketing campaign few organisations can ever afford.

6. **Mission Delivery** – these individuals can deliver projects related to your mission with limited time and involvement from the paid employees.

7. **Increased Impact** – the impact of your organisation can be expanded significantly by engaging peoples' heads to plan and think differently, rather than continuing to execute in the same ways .

8. **Raise Current Salaries** – improved engagement of people can bring the number of paid employees down so that there can be more reasonable salaries paid to people who have skills to connect/delegate/convene/enable other people

Challenges of engaging skilled volunteers

1. **Roles and expectations** – an inappropriate fit between the volunteer and the project or task or the organisation may lead to abandonment of the project or task causing disruption to the organisation, a loss of the organisation's investment in the volunteer and a negative public image or perception; clearly defining roles and expectations will help to mitigate this

2. **Financial Impact** – engaging shorter term volunteers may increase financial demands related to recruitment and retention

3. **Orientation and Training** – engaging shorter term volunteers potentially requires an increase in the frequency of allocating staff and resources needed to orient and train larger numbers of volunteers

4. **Staff resources** – increased use of essential paid staff may be required to manage volunteers who make shorter term commitments, diverting their energy away from core organisational activities

5. **Integration of Volunteers** – introducing shorter term volunteers into an organisation along

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> with regular volunteers may be logistically challenging; attention to creating teams that work is key, no matter how long or specific the volunteer assignment may be.

Many of these challenges may be mitigated by quality people leadership. Following a step-by-step approach to engaging highly skilled people will prevent nonprofit organisations from encountering many of these challenges, and increase the benefits for their organisation and the clients they serve. Below is a series of proposed *"Steps to Initiating a Skills-based Volunteer Strategy."*

Some organisations, however, may assess that they do not yet have the organisational capacity to engage highly skilled volunteers. The executive director and other members of the senior management team may not be fully supportive. The organisation may need to engage or designate (paid) volunteer management staff, or they may need to provide release time so that their volunteer management staff may undertake educational programs to develop the necessary change management skills. The availability of pre-service and in-service learning opportunities for volunteer managers about this "new" approach to volunteerism is an area for further investigation.

Organisations may also benefit from the formal or informal mentorship of other nonprofit organisations that have successfully navigated this paradigm shift. The development of peer support networks or mentorships to facilitate the required changes in volunteer management is an area for future research. The UK-based *Small Charities Coalition* is one possible model that deserves further investigation – they match small charities with other organisations, often larger charities or private sector organisations, that have the knowledge, skills, experience, and in some cases resources, that the small charity lacks.[19]

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Promising Practice – Tool

The Nonprofit Readiness Toolkit for Pro Bono Volunteering – an online course with many checklists and assessment tools designed to assist nonprofit organisations to determine their readiness to work with highly-skilled volunteers.

NB: Requires registration to access.

For more information:
http://learning.nationalservi ceresources.org/course/vie w.php?id=62

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Steps to Initiating a Skills-based Volunteer Strategy

1) Assessment

- assessed organisational readiness to engage highly skilled and pro bono volunteers[20]
- clarified roles and responsibilities within organisation for volunteer management

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[19] A free service, The Small Charities Coalition is about helping small charities to help themselves, and enable them to have access to the considerable expertise of their larger counterparts in the charitable sector or those from other sectors. For more information, see http://www.smallcharities.org.uk/aboutus/ accessed on March 10, 2010

[20] The Online Learning Center of the Corporation for National & Community Service offers, free, easy-to-use online courses and tools for volunteer and service programs. One course, **"**The Nonprofit Readiness Toolkit for Pro Bono Volunteering", designed to help nonprofit organisations prepare for pro bono and highly skilled volunteers includes a "readiness checklist" that assists the nonprofit organisation in assessing their capacity for engaging volunteers. Accessed on February 18, 2010 from http://learning.nationalserviceresources.org/file.php/62/KnowledgeAssessment3.pdf

- defined organisational goals and needs using the organisation's strategic plan and/or other planning documents
- proactively identified potential projects or tasks that could be completed by highly skilled and pro bono volunteers
- developed a system for responding to highly skilled and pro bono volunteers who want to offer their time and talent to your organisation

2) Planning
- obtained commitment from staff to collaborate with highly skilled and pro bono volunteers on projects involving their area of expertise
- developed draft documents describing projects or tasks including the details of the scope of the work, estimated time required, timeframe, deliverables and accountability/evaluation process[21]
- developed draft contract describing the roles and responsibilities of the both the volunteer and the organisation
- developed or reviewed screening and interview tools; modified tools as necessary related to the specific parameters of the project or task
- developed a marketing or outreach plan designed to attract specifically- professionally-skilled or pro bono volunteers
  For example:
  o develop project or task-specific marketing tools including those suitable for electronic and print-based distributions
  o announce volunteer positions through regular communication channels including posting positions on organisation (e-)bulletin boards, publishing in (e-)newsletters; posting on social marketing sites i.e. Facebook, Twitter; distributing promotional flyers, postcards, bookmarks, etc
  o identify potential sources of volunteers through current volunteers[22]
    - contact existing volunteers to determine personal interest
    - contact existing volunteers for suggestion for volunteer contacts
  o conduct a volunteer interest survey to determine interest in specific tasks or projects [23]

> **Promising Practice - Tool**
>
> ***Give Back Chicago*** hosts a live skills auction providing an opportunity for highly skilled volunteers to network with non profit organisations who have current skills-based volunteer opportunities available.
>
> A ticket includes a (donated) wine and cheese reception and a gift certificate towards the purchase of dinner from Market vendors.
>
> The balance of the registration is donated to one of the nonprofit organisations based through a random draw held at the end of the event. Prospective volunteers vote for their preferred organisation when registering.
>
> *For more information:*
> *http://givebackchicago.eventbrite.com/*

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[21] "Expectations should be made clear from the get-go by having solid project and job descriptions. The position, time commitment and desired deliverables must be established in the initial recruitment process." p. 11. Vantage Point. A PEOPLE LENS" 101 WAYS TO MOVE YOUR ORGANIZATION FORWARD. 2009. Available for purchase online at http://www.volunteervancouver.ca/content/people-lens

[22] "Charities that use volunteers to recruit other volunteers have higher retention rates. Having volunteers represent the charity implies trust, evidence of a positive organizational culture, and confidence that the charity provides a worthwhile experience for volunteers." p. 11
http://www.urban.org/UploadedPDF/411005_VolunteerManagement.pdf

- partner with other nonprofit organisations to host volunteer fairs
- engage a volunteer broker
- develop strategic relationships with business and corporations, especially with those that have employer-supported volunteer initiatives including pro bono volunteer programs[24]

3) Engagement

- review or develop and implement "onboarding" protocols that orient volunteers to the organisation i.e. explain the organisations' mission, vision, objectives; explain the relationship of volunteer to the organisation; explain the rights and responsibilities of all volunteers that work for the organisation, and explain the organisations' recognition practices
- define parameters of relationship based on project definition; consider use of formal contract
- develop and implement an orientation plan specific to the highly skilled volunteer's project or task
- clarify communication/reporting channels, including direct supervision and accountability
- complete screening process as per organisational policy
- review any relevant conflict-of-interest policies as per organisational policy
- a focus on accountability and the role of learning in the organisation

4) Implementation

- engage volunteer in sharing experience with appropriate members of the senior management team

> **Promising Practice - Resource**
>
> Volunteer brokerage organisations offer matching services for nonprofit organisations and volunteers. Some are profession-specific i.e. **Volunteer Lawyers Service (VLS)** is a pro bono program that assists eligible non-partisan charitable organisations in obtaining pro bono legal services that would otherwise be unavailable to them due to a lack of financial resources. The VLS matches nonprofit organisation with a volunteer lawyer based on the needs of the organisation, on an issue by issue basis, based on an application process.
>
> *For more information, see:*
> *http://www.volunteerlawyersalberta.com/index.html*

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[23] A *volunteer interest survey* has been developed by Volunteer Toronto for workplaces to assess the interests of their employees; it could easily be adapted for use by nonprofit organisations. See http://www.volunteertoronto.ca/site/volunteer_toronto/assets/pdf/EVP_-_EMPLOYEE_SURVEY.pdf

[24] In a press release about their 2009 Volunteer IMPACT Survey, Deloitte noted that "The slow adoption of skilled volunteer services could be due in part to a startling lack of knowledge among nonprofits when it comes to securing pro bono projects. Nearly all nonprofits surveyed (97 percent) do not know who in a company to approach with pro bono requests. Likewise, 95 percent do not know which companies to appeal to with these requests. This lack of familiarity with ways to secure pro bono services could also be driven by the fact that half (50 percent) of corporations nationwide do not offer skilled volunteer support, despite a belief in its value." While this information is based on findings from the US, there is little reason to believe that the situation in Canada is different. Accessed on March 1, 2010 from http://www.deloitte.com/view/en_US/us/press/Press-Releases/press-release/3f7afd0057101210VgnVCM100000ba42f00aRCRD.htm

Guidelines for developing such strategic relationships may be found in Sections 3 and 4 of EMPLOYER SUPPORTED VOLUNTEERING FOR VOLUNTEER-INVOLVING ORGANISATIONS – A COMPLETE BEGINNERS GUIDE, Volunteering England. Accessed on February 24, 2010 from http://www.volunteering.org.uk/WhatWeDo/Projects+and+initiatives/Employer+Supported+Volunteering/Volunteer+Involving+Organisations

5) Reporting and Evaluation

- develop a tracking system to record and monitor the contributions of volunteers[25]
- develop a reporting mechanism to track outcomes/deliverables and hours of volunteer service
- draft an exit interview for use at the closure of specific volunteer projects

6) Recognition

- develop a recognition plan that identifies the contributions that volunteers make to the organisation
  - profile volunteer in your organisation's newsletter and/or annual report
  - profile volunteer in local media
  - invite volunteer to annual general meeting, and acknowledge them verbally, or give them an award
  - host volunteer recognition events such as an appreciation lunch, dinner, barbeque or reception, either regularly or at the conclusion of the project
  - nominate volunteer for corporate or community volunteer sector awards
  - provide letters of reference or other appropriate documentation of voluntary activity
- develop a plan for maintaining a relationship with highly skilled volunteers[26]
  - invite volunteer to join organisational staff in training in a new or related field
  - ask volunteer to participate in another project
  - invite volunteer to take on a leadership role in a committee
  - invite volunteer to become a member of the

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[25] Volunteering England reports an increasing interest in the issue of the economics of voluntary work. The Volunteer Investment and Value Audit (VIVA) is a measurement tool that assesses the 'outputs' of volunteer programmes (the value of volunteers' time) in relation to the 'inputs' (the resources used to support the volunteers). They caution that "The economic approach focuses purely on monetary value and may be damaging if it reinforces the notion that volunteering is all about saving money. It is therefore vital that indicators of cost-effectiveness are always considered within a full appreciation of why your organisation has volunteers and the many values and benefits which volunteering produces." For more information see http://voluntaryaction.info/vivahelpguide.htm and http://www.volunteering.org.uk/WhatWeDo/Projects+and+initiatives/Employer+Supported+Volunteering/Resources/Evaluation/VIVA

[26] "For many pro bono volunteers, opportunities for professional advancement may mean more than appearing at an annual recognition banquet. . . A one time pro bono volunteer may become an ardent advocate for the nonprofit organization if he/she is provided with the opportunity to advance or to try out new experiences." Accessed on February 18, 2010 from http://learning.nationalserviceresources.org/mod/book/view.php?id=524&chapterid=270

board of directors

The assessment and planning steps described in this process are key to actively engaging highly-skilled volunteers. The remaining steps strengthen the organisation's capacity to manage all volunteers.

Related Themes

Two related themes were identified: employer-supported volunteer initiatives, the response of the private sector to the changing culture of volunteerism, and its impact on the workplace, and the development of integrated human resources, an approach that engages individuals with the necessary competencies to fulfil the organisation's mission, who may be paid or unpaid.

Employer-supported Volunteer Initiatives (ESVI)

Employer-supported volunteer programs are one way that corporations can meet the increasing demand for donations and support from the nonprofit and voluntary sector in this time of economic challenge.[27] ESVI are also an opportunity for corporations to respond to pressure from customers, shareholders, potential investors and business partners to become more socially aware and accountable.

There are many ways that employers can demonstrate their support of volunteerism. Businesses and corporations can develop workplace policy that enables employees to take time off to volunteer in their local communities; grants paid leaves or sabbaticals or provides for secondments that allow an employee to work on a specific project fulltime. They can make donations to charitable and nonprofit organisations where their employees have demonstrated a volunteer commitment. Alternately, some businesses may encourage employees to focus their volunteer efforts on organisational key or signature issues, issues that may be locally relevant or that are critical on a national or global level. These signature issues frequently align with workplace-giving or fund-raising campaigns.

Corporations may also help their employees learn about volunteer opportunities, including skills-based volunteerism, in their communities, or in their professions by designating or hiring staff to develop and implement programs that will assist employees to participate in voluntary activities.[28]

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[27] Based on their 2009 Volunteer IMPACT Survey, Deloitte noted that "Despite the challenging economic backdrop, nearly 40 percent of nonprofit executives say they will spend between $50,000 and $250,000 or more of "hard-won" cash on outside contractors and consultants this year." They suggest that pro bono and skilled volunteer support could offset such costs in addition to addressing the decline in corporate giving dollars. i.e. rather than soliciting donations, nonprofit organisations could engage volunteers to meet their needs for skills and expertise. See: http://www.deloitte.com/view/en_US/us/press/Press-Releases/press-release/3f7afd0057101210VgnVCM100000ba42f00aRCRD.htm

[28] Nadine Maillot. A SOUND INVESTMENT: THE VALUE OF ADDING VOLUNTEER RESOURCES MANAGEMENT TO YOUR PHILANTHROPIC PORTFOLIO. Volunteer Canada, 2004. (Version française également disponible.) ISBN 1-897135-00-9 This document includes profiles of businesses that have developed employee volunteer program including companies such as *Business Objects* which is it reports hired staff to match skilled volunteers with nonprofit organisations. p. 8. Accessed on February 21, 2010 from http://volunteer.ca/volunteer/pdf/UPSEng.pdf. Also see p. 7. "The continuum of employer-supported

Such initiatives benefit employees by enabling them to become involved in their local communities without compromising their employment, and may increase their employability through acquisition of further skills, and experience.[29]

These same initiatives strengthen relationship between the different sectors, and benefit the corporation by enhancing their public image as good corporate citizens, by aligning themselves with employees' and community values, and increase employee loyalty by gaining more committed, skilled and satisfied employees.[30]

Benefits for nonprofit organisations include "the creation of a community advocate for the organization's mission and programs, or a potential board member, or a leader-mentor for the staff, or connections to new networks, or a potential financial contributor to the organization."[31]

There are several specific programs that employers may wish to implement in their workplaces depending on the nature of their workforce including the two discussed below, supporting nonprofit board service and implementing a pro bono volunteer program.

- Nonprofit board service

  Board members are the governing body of charitable and nonprofit organisations. Boards work to ensure that the organisation fulfills its legal, ethical and financial obligations to the organisation and to the public. Activities involved may include organisational development, strategic planning, human resource planning, policy development, fundraising, as well as public relations. Board members are often responsible for the hiring and evaluation of executive staff. They may draw upon professional expertise in engineering, finance, human resources, information technology, law,

> **Promising Practice – Resource**
>
> *Volunteer Toronto* promotes **Employee Volunteer Programs** through a series of information documents which encourage businesses and corporations to implement such practices in their workplaces. There are also tools available to assess employee interest.
>
> *For more information:*
> *http://www.volunteertoronto.ca/index.cfm?id=14369*

> **Promising Practice – Tool**
>
> Volunteering England offers an 18 page guide, *Employer supported volunteering for large companies – A Complete Beginners Guide*, for corporations considering initiating an employer-supported volunteer program. The guide includes a step-by-step plan, with readiness checklists, links to policy development and planning support documents and templates, and other related organisations.
>
> *For more information:*
> *http://www.volunteering.org.uk/NR/rdonlyres/E8E7B5E1-C946-4E7A-A777-5B994CFE796F/0/beginners_guide_large_employers2007update.doc*

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volunteerism." in VOLUNTEER CONNECTIONS: THE BENEFITS AND CHALLENGES OF EMPLOYER-SUPPORTED VOLUNTEERISM. Volunteer Canada, 2001. ISBN 0-9688866-6-3. 52 pp.
[29] ". . .to be effective, adult learning experiences should be engaging, personally relevant, with real world applications.. . .people who volunteer their intellectual capital to a nonprofit organization are in an optimal learning environment to practice and develop skills, given the authenticity of the work. p. 3. 2008 EXECUTIVE SUMMARY: DELOITTE VOLUNTEER IMPACT SURVEY. Accessed on March 2, 2010 from http://www.deloitte.com/assets/Dcom-UnitedStates/Local%20Assets/Documents/us_comminv_VolunteerIMPACT080425.pdf
[30] p. 10. VOLUNTEER CONNECTIONS.
[31] NON-PROFIT READINESS TOOL KIT FOR PRO BONO VOLUNTEERING. The Online Learning Center of the Corporation for National and Community Service. Accessed on February 23, 2010 from http://learning.nationalserviceresources.org/mod/book/view.php?id=520&chapterid=235

marketing, operations management, public relations, etc. They may serve on working groups or sub-committees. They may serve as "in-house" consultants.

Board membership benefit volunteers by providing opportunities to develop and enhance leadership skills; expand professional and personal contacts, develop specific professional skills depending on the role undertaken and well as an opportunity to serve their community through working for an organisation whose mission aligns with personal values.
"Board service is one of the most valuable assets the business community can offer nonprofits and it is an excellent way for businesses to contribute intellectual capital,"[32] serving to strengthen the nonprofit sector. [33]
As noted above, in times of economic constraints when monetary donations may not be feasible, private businesses and corporations may still be able to participate in and support the public sector through such in-kind donations of time and expertise.

Corporations that wish to support their employees' involvement on volunteer boards of directors may develop their own cross-sector relationships, particularly if they want to encourage employees to focus their volunteer efforts on organisational key or signature issues.

They may also refer employees to one of several different organisations that work to match individual volunteers with charitable or nonprofit organisations seeking board members.[34]

Cautions:

Board members must understand their roles, so that they can be productive in serving nonprofit organisations. General and specific training about roles within and functions of a volunteer board are essential; the roles and functions of a board are different in the business or private sector. Some matching organisations provide this kind of information. In some communities, local volunteer organisations offer workshops or online courses.

- Pro bono volunteer programs

The term "pro bono" originated within the legal profession but has been adopted to describe the professional skills and services that many corporate and business volunteers willingly donate to benefit nonprofit organisations, often

Promising Practice – Program
BoardMatch Fundamentals Canada is an innovative service that introduces registered charities and nonprofit organisations to talented and enthusiastic individuals interested in sharing their expertise by serving as members of volunteer boards of directors. The service has placed more than 2400 volunteers on the boards of over 650 charitable organisations in Calgary, Fredericton, Greater Toronto Area, Greater Vancouver, and Thunder Bay.
NB: The program does not pre-screen prospective board candidates and participating agencies.
For more information - http://www.altruvest.org/BoardMatch/Content/ProgramOverview.aspx

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[32] Deloitte states that "Our people are encouraged to serve on boards of nonprofit organizations in their community. Nearly half of our partners, principals and directors currently serve on at least one board." http://www.deloitte.com/view/en_US/us/About/Community-Involvement/nonprofit-board-service/index.htm
[33] One organisation's perspective may be found here:
http://www.deloitte.com/view/en_US/us/About/Community-Involvement/Pro-Bono-Service/index.htm
[34] BoardMatch Fundamentals Canada offers an education program for potential board candidates, as well as a matching service for both candidates and organisations. See http://www.boardmatch.org/ accessed on February 21, 2010.

within formalised outcomes-focused agreements.[35] Any corporation with a large body of skilled professionals may be able to establish a pro bono volunteer initiative in its workplace.

The donation of such intellectual capital strengthens the capacity of charitable and non-profit organisations so that they are better able to fulfil their missions.
Pro bono volunteers have a very similar profile to those encountered through a skills-based volunteer engagement strategy. They are likely to be highly-skilled professionals with specific personal and professional goals that they hope to meet through a volunteer commitment.

Pro bono volunteer programs are often facilitated by a corporation's volunteer department or manager.

Pro bono volunteers are likely to be engaged in volunteer commitments that are organised as time-limited projects or contracts with specific well-defined deliverables, and a well-defined reporting mechanism.
Pro bono volunteers are more likely to work directly with the senior management team of a nonprofit or voluntary organisation. They may be specifically engaged by the board or the executive director to act as advisors on capacity-building projects. Charitable and nonprofit organisations may need to assess their readiness for engaging with pro bono volunteers.[36]

Resistance within Traditional Models:

- Skilled or pro bono volunteers must provide the kind of capacity-building support required or defined as needed by the charitable or non-profit organisation.[37] On the other hand, an organization may not know what it needs or what is available until they are approached by the volunteer with the idea.

- Skilled or pro bono volunteers cannot be seen as imposing business models or styles of leadership on

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Promising Practice – Resource

The *Pro Bono Action Tank (PBAT)* provides resources to inspire and enable the business community to engage in pro bono service, develop standards to ensure high-quality service delivery, and make it easier for nonprofit organisations to access the professional expertise they need to achieve their missions.

For more information, visit www.probonoactiontank.org

Promising Practice – Tool

Framework: Designing Pro Bono Service for Impact: A guide to the tenets of high-quality pro bono service delivery. A tool for enabling corporations to develop a pro bono volunteer program.

For more information: http://www.probonoactiontank.org/pdf/resources/Designing%20for%20Impact%20Framework_PBAT.pdf

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[35] www.probonoactiontank,org
[36] READINESS CHECKLIST FOR ENGAGING PRO BONO AND HIGHLY SKILLED VOLUNTEERS. Accessed on February 16, 2010 from
http://learning.nationalserviceresources.org/file.php/62/KnowledgeAssessment3.pdf
[37] p. 18. Alan Eagle, Lisa Parker and Rob Jackson. DEVELOPING UNDERSTANDING AROUND NON-FINANCIAL SUPPORT. London: The Smart Company. Summer 2007. 36 pp.
http://www.nationwidefoundation.org.uk/NFS_report_08.pdf   accessed on March 3, 2010; See similar comments on p. 3. Allen Consulting Group. GLOBAL TRENDS IN SKILL-BASED VOLUNTEERING. Australia, 2007. 38 pp.
http://www.probonoaustralia.com.au/sites/www.probonoaustralia.com.au/files/news/archive/2007/05/151109-upload-00001.pdf

charitable or nonprofit organisations. On the other hand, organizations can benefits from being explosed to models and mindsets from other sectors.

- Pro bono volunteers cannot be used to replace regular staff or consultants. If paid staff perceives that pro bono or skilled volunteers are being used as a cost-cutting measure, resentment will follow, undermining the individual volunteer and potentially the whole volunteer program.[38] On the other hand, if paid employees understand that their role is to engage skilled volunteers in this way, their role as recruiter and manager is reinforced through skilled volunteers.

Integrated Human Resource Strategy

An integrated human resource strategy is a planned approach to identifying the work functions that an organisation needs to achieve its mission. This approach requires organisations willing to invest the time required to attract and retain both paid and unpaid staff or volunteers with the specific skills needed to meet these demands, and to create a reputation for offering a workplace where people can gain satisfaction from their work.

Job design is one key component of an integrated human resource strategy. This includes defining jobs and positions that are meaningful to the organisation and challenging to volunteers and that make good use of their skills is important to the success of this strategy. The *Community Access Programs of Halifax* has developed an online tool to help organisations focus on job design including strategic questions to help applicants through the process.[39]

Further research related to implementing an integrated human resource strategy has been completed by *Volunteer Calgary.* They recently piloted a project to recruit high-skilled or professionally skilled individuals to work for voluntary organisations with the goal of providing meaningful involvement to the volunteers and capacity enhancement for the organisations. Their project identified five important lessons learned:

1. **Essential Strategic Leadership** – The Executive Director must champion a culture and structure that supports the full integration of highly-skilled volunteers.

2. **Role and Place of the Manager of Volunteers** – Organisations need to identify a staff manager of volunteers who is a member of the management team.

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[38] I cannot state this strongly enough. This sentiment was expressed in many, many documents from Canadian, US, Irish and other sources. There is a fear that government and/or the public sector not become reliant on highly skilled volunteer support to the detriment of paid staff i.e. situations cannot arise where skilled volunteers or pro bono workers are engaged to perform work previously assigned to regular paid staff as a cost cutting measure.

[39] http://www.halifaxcap.ca/volunteer/manual/section1/position.htm

3. **A People First Focus** - requires an alignment of systems, policies and processes for paid and unpaid staff.

4. **Valuing All the People** – Volunteers and staff need to understand the "value" that each brings to the organisation to overcome the outdated perceptions of "I am/you are just a volunteer, and I am smarter and better because I am paid."

5. **Readiness for an integrated human resource strategy approach** – To succeed, this approach needs to be integrated with the organisation's strategic plan.[40]

More research about the use of this strategic approach is necessary.
Policy Implications

Public policy related to volunteer engagement or community services tends to have one or more of the following six objectives:

- To develop citizenship
- To develop employment skills
- To demonstrate suitability or character
- To support inclusion or integration
- To support the community
- To enhance democracy

Citizenship: There are a number of mandatory community service programs that have a stated goal of developing citizenship such as the community service hours that have become a high school graduation requirement in many provinces and territories. In the handbook for immigrants going through the process of becoming citizens, there is a reference to volunteering as a means of expressing citizenship. In Quebec, the "autonomous community sector" is recognized as a vehicle for the expression of citizenship.

Employment: Volunteering is recommended by employment counselors, social workers, integration workers, and guidance counselors to those who would benefit from volunteering as a vehicle to enhance their employability. A number of social assistance programs in the country require community involvement as an eligibility requirement i.e. in order to continue to receive benefits recipients must perform volunteer work, in part because it is recognized as a means to improve work habits and to develop marketable skills.[41] In addition to volunteering being recognized for its impact on employability, many employers have begun to include volunteer activities in performance assessments and decisions around promotions and merit-based compensation. Many Community Investment Committees in corporations use the skills development benefits of a proposed volunteer activity as a criteria for assessing requests to participate in community events. As part of a retiring person's transition, human resource departments will often arrange for a placement in a voluntary organisation.

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[40] Adapted from "*Integrated Human Resource Strategy Learnings & Implications from the High Skills Volunteer Research Pilot Project*" available online from
http://www.volunteercalgary.ab.ca/news_resources/high_skills_research.html
[41] However, this makes sense only when these volunteers enhance the mission delivery of the organisation. If the organization is "serving" these volunteers, such mandatory volunteering does not serve the greater community well.

Suitability/Character: Many universities explicitly ask for a log of volunteer involvement as a way of assessing a person's suitability for a range of professional degree programs including medicine, social work, recreation, and teaching. In fact, many have a specified minimum number of hours required. The justice system has also recognised community involvement as a means to either assess or to develop character. For example, defense lawyers will often recommend that their clients participate in volunteering prior to a sentencing hearing. The courts will often consider alternative sentencing programs or Community Service Orders, ostensibly as a means of rehabilitation or character development.

Inclusion/Integration: Volunteering is often recommended by social service workers, child and youth development workers and developmental therapists as an activity through which individuals with special needs may learn or enhance daily living skills, social skills and employment skills.
New immigrants are frequently encouraged by integration workers and language instructors to participate in volunteer activities to develop language skills, to develop friendships and supportive networks as well as to learn about Canadian culture.

Supporting the Community: Prominent in many public policy and corporate policy documents, "supporting the community" is mentioned as a main purpose of community service or volunteering programs. More often than not, this is seen by the public as a secondary benefit to one of the four above.

Democratic Renewal: Voluntary organisations and voluntary action has been recognized by many governments around the world to be a vehicle for strengthening democracy. As citizens organize around their collective values, they contribute to societal norms and standards that have a direct influence on public policy. At a time when the Canadian government has renewed interest in citizen engagement and democratic renewal, this ought to be more explicit in a number of related public policies.

Conclusion

Skills-based volunteer engagement is not new. It has always been one of the lens through which volunteers have sought out voluntary activities. Likewise, organisations have always formally or informally attempted to match the skills of the volunteer with the needs of their organisation. This was evident in the volunteer opportunities databases, largely developed in the mid-nineties, which included skills/expertise field and search capacities. There have been programs over the years that have been skills-based, including international development organisations, board recruitment initiatives, management assistance programs, and those aimed at retired executives.

What is new is the broader understanding and use of a skills-based approach and how it relates to the overall human resource strategies in an organisation. What is also new is the primacy of the skills lens used by both the volunteer and the organisation. The skills are viewed as the assets they bring in their desire to be engaged in the community.

Explicit Reciprocity is also relatively new. While organisations have been aware of the need to attend to the interests and needs of volunteers as a means of recruitment and retention, volunteers' personal goals were still seen as secondary to achieving the

mission of the organisation and meeting the needs of the clients they serve. In strategic skills-based volunteer engagement, both sets of needs and goals are known and negotiated upfront and the relationship is evaluated against those needs and goals by both the volunteer and the organisation.

Skills-Based engagement coupled with short-term or episodic volunteering creates the need for the design of volunteer assignments and contracts to be highly focussed and to set clear boundaries, in terms of the scope of the work, the resource requirements, and the time frame. **Results-based Management** practices are incorporated into the design of skills-based volunteer engagement both in carrying out and evaluation the task, project, or product.

Integrated Human and Financial Resource Management needs to be reflected in strategic planning, budget development and monitoring, and all areas of accountability and reporting. What resources does the organisation need to achieve its mission and how do you generate and grow the various types of **human** and financial capital assets?

On a **cautionary note** – focusing on skills as a volunteer engagement strategy should not be detached from a connection to the organisation's mission or from some desire by volunteers to contribute to community. Ensuring that the human resources and, in particular, volunteer management policies and practices are not circumvented and that all staff members have the skills and attitude to identify needs, opportunities, and people that come together.

Organisational readiness, particularly the leadership of the executive director and senior management, was identified as key to the successful implementation of a skills-based volunteer engagement strategy. Mentorship was also identified as vital to the successful transition to this model of people engagement; mentoring relationships should be ongoing, and include peer-to-peer support, within the organisation and within the broader non-profit and voluntary and non-profit sector.

NOTE TO READER: As noted in our introduction, we hope that this paper will stimulate discussion both within and outside the voluntary sector. It will serve to inform the next phase of this three year project – ***The Changing Culture of Volunteering: A Skills-based Approach to Volunteer Involvement -*** during which pilot projects will assist both capacity-builders and local organisations serving children, youth and families to develop their capacity to engage skilled volunteers, which will in turn enable them to successfully fulfil their missions.

The paper has also discussed some of the practical implications of engaging skilled volunteers, including identifying some cautions. The importance of a skills-based volunteer engagement philosophy being reflected in the organisations' strategic plan was identified as a mitigating factor. We also identified some of the programs, tools, resources, and policies that already exist to support the adoption of skills-based volunteer engagement. Many were developed for use outside Canada, and may need to be adapted for internal use.

Several organisations have been identified as having demonstrated leadership in response to the changing culture of volunteerism or civic engagement - *Vantage Point,*

Volunteer Calgary and the *Framework Foundation*. Their journeys and innovations will be captured in a series of case studies that will follow. Visit www.volunteer.ca

Terminology

Canadian Code for Volunteer Involvement
The Canadian Code for Volunteer Involvement provides voluntary and not-for-profit organisations with a philosophical framework for involving volunteers at the governance, leadership and direct service levels.

Capacity-Building Philanthropy is the regular, ongoing contribution by the private sector of human resources, technology, skills and knowledge to assist nonprofit organisations to enhance their capacity to fulfill their missions to serve.

Corporate social responsibility (CSR), also called 'corporate responsibility', is a redefinition of the role of business requiring companies to account for their social and environmental impact as well as their financial performance, and to make a positive contribution to the communities in which they work. It includes these concepts:
- good employment practices and diversity in the workplace
- corporate governance
- fair trading in the market place
- environmental responsibilities
- human rights practices
- community investment (including employer supported volunteering)[42]

Employer-supported volunteer initiatives are initiatives through which businesses enable their employees to donate skills and volunteer time. It can take many shapes and forms with varying levels of employer support.[43]

Grassroots volunteers or **volunteering** is the engagement of individuals in meeting the specific needs in their own neighbourhoods or communities. Such volunteers are engaged spontaneously in response to the perceived need, without any formal structure i.e. job descriptions, risk management policies, etc.

The term **highly-skilled volunteer** has arisen in the nonprofit and voluntary sector to distinguish traditional volunteers from those individuals who are engaged in volunteerism because they have specific knowledge, skills or expertise. These volunteers may also be called "professionally-skilled" or "specifically-skilled" volunteers.

Human capital refers to the unique set of capabilities and expertise of individuals that are productive in some economic context. From an organisational perspective, **human capital** is one of an organisation's intangible assets; it is all of the competencies (skills, experience, potential and capacity) and commitment of the people within the organisation. **Human capital** is a way of viewing people as critical contributors to an organisation's success. Companies, governments and individuals can invest in this 'capital' just as they can invest in technology and buildings or in finances.

An **Integrated human resource strategy** is a strategically planned approach to identifying the work functions that need to be accomplished in organisations and to involving people, whether paid or unpaid, to perform the work needed to achieve the organisation's mission. It assumes that "highly-skilled" or "professionally-skilled" individuals can be engaged in organisations by offering their skills and knowledge in both a paid and volunteer capacity. The strategy is not only viable but will increasingly become a necessity for voluntary organisations to remain sustainable. In order for an integrated human resource strategy to be successful, organisations utilising this

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[42] From Volunteering England.
http://www.volunteering.org.uk/WhatWeDo/Projects+and+initiatives/Employer+Supported+Volunteering/Employers/CSR+and+CCI/CSR/
[43] http://volunteer.ca/volunteer/pdf/UPSEng.pdf p. 19 Accessed on Sunday, February 21, 2010

strategy will need to create a reputation for offering a workplace where people can gain satisfaction from their work regardless of whether or not they are paid.

An **international volunteer** is a person who volunteers outside of his or her own country. Some international volunteers, usually those who will more than three months or more in the field, receive a small stipend, and agree not to engage in any other paid work during their full-time volunteer assignment. Short-term international volunteers usually receive no stipend, sometimes international volunteers must pay all of their own transportation and housing expenses.[44]

Knowledge Philanthropy is the donation of one's knowledge, skill and expertise to move and organisation closer to its mission.[45]

Micro-volunteering is defined as contributing to a charitable or nonprofit organisation or cause through small, quick, convenient, and low-commitment ways which don't require the commitment of regular, scheduled volunteering. A brief list of examples includes tasks such as developing web or promotional content i.e. a question and answer section for the organisation's web page; proof reading organisational documents, developing a Facebook page; taking promotional photos; introducing the use of web-based tools such as Flikr. **Micro-volunteering** is linked to skills-based volunteering although projects or tasks are likely to be less complex.

Mission-based management is a process for organisational decision-making that is mission-driven, ensures internal accountability, distributes resources in alignment with organisation-wide goals, and is based on timely, open, and accurate information.[46]

Non-financial support refers to the different types of donations to charitable organisations, excluding contributions of cash. Non-financial support can take the form of consultation, training, volunteer time, donations or loans of equipment, use of space for specific events or on an ongoing basis, etc. For the purpose of this paper, 'NFS' refers to the donation of skills-based support, such as consultation and mentoring, etc.[47]

The **nonprofit and voluntary sector** is a term used to describe "the sphere of social activity undertaken by organisations that are non-profit and non-governmental." This sector may also be called the civil sector or the third sector; the other two sectors include the public sector and the private sector.[48] The organisation that comprise the **non profit and voluntary sector,** have the following characteristics:
- have some degree of internal organisational structure, meaningful boundaries, or legal charter of information
- are non-profit, that is, not returning profits to their owners or directors and not primarily guided by commercial goals
- institutionally separate from government, so that while government funds may be received, the organisation does not exercise governmental authority
- are self-governing, which means the organisations control their management and operations to a major extent
- are not compulsory, which means that membership and contributions of time and money are not required by law or otherwise made a condition of citizenship.[49]

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[44] http://www.icvolunteers.org/index.php?what=icts&id=21 Accessed on Thursday, February 11, 2010.

[45] Volunteer Vancouver. http://www.volunteervancouver.ca/content/media Accessed on Wednesday, February 10, 2010.

[46] http://www.upstate.edu/mbm/faqs.php [Accessed on March 31, 2010

[47] Adapted from p. 9 . Alan Eagle, Lisa Parker and Rob Jackson. DEVELOPING UNDERSTANDING AROUND NON-FINANCIAL SUPPORT. London: The Smart Company. Summer 2007. 36 pp. http://www.nationwidefoundation.org.uk/NFS_report_08.pdf accessed on March 3, 2010.

[48] Adapted from http://en.wikipedia.org/wiki/Voluntary_sector accessed on March 1, 2010.

[49] Adapted from a description used by the Johns Hopkins Centre for Civil Society Studies cited by the Office for the Community and Voluntary Sector, Ministry of Social Development, New Zealand, accessed on March 1, 2010 from http://www.ocvs.govt.nz/about-the-community-and-voluntary-sector/definition-of-the-sector/index.html

Pro bono [volunteering] is the donation of professional services that are included in an employees' job description and for which the recipient nonprofit would otherwise have to pay. It is a subset of skilled volunteering that gives nonprofits access to the business skills and experience they need to develop and implement sound business strategies, increase their capabilities and improve their organisational infrastructure. By contributing business services and skills to nonprofits, corporate pro bono programs are improving people's lives while adding significant value to their own recruitment, productivity and profitability.[50] A **pro bono volunteer** is different from other volunteers in that they bring expertise to an organisation on a project basis that includes clear guidelines, deadlines, and deliverables.[51] They are more likely to function as consultants. Rather than having a long term role in the organisation, they provide technical assistance, such as financial or legal expertise, marketing and communications experience, human resources experience or other organisational development expertise.[52]

Recruitment is the process of encouraging people to give their time and energy to an organisation as volunteers. Successful recruitment requires the support of the entire organisation. Recruitment activities are closely tied to overall public relations and marketing efforts.

Release Time is an employer-based leave policy, which permits employees paid leave to perform community service. Policies may quantify time in hours or days.

Signature Issues are issues defined by a business or organisation that serve as a focus for employee-based volunteer efforts. They may be locally, nationally or globally relevant. They may or may not be directly related to the day-to-day work of the business.

Skills-based volunteerism is service to nonprofit organisations by individuals or groups that capitalises on personal talents or core business or professional skills, experience or education, often for the purpose of building organisational strength and increasing capacity.[53]

A **Timeraiser** is a nonprofit event supporting artists and nonprofit agencies. A Canadian initiative, begun in 2002, it is "one part volunteer fair, one part silent art auction and one solid night on the town." Participants meet with representatives from different organisations and match their skills to the needs of those organisations. Once attendees have made their match, they become eligible to bid on the artwork by talented, emerging artists that is also on display. Rather than bid money, participants bid volunteer hours to charitable and nonprofit organisations. Winning bidders then have a year to complete their pledge, after which they receive the artwork as a reminder of their goodwill.[54] Timeraiser's mission is to "bring people to causes and causes to people".[1]

Traditional volunteerism does not require specific skills or training, although training may be provided for effective use of volunteers in some settings. Commonly, traditional volunteers provide administrative support or direct service.

A **Volunteer** is a person who provides or offers to provide a service voluntarily, for the greater benefit of society, without the motivation of financial or material reward. Volunteer service can take many forms, often involving administrative and clerical support or direct service. Volunteers do NOT replace paid workers, but complement regular staff enabling them to focus on core organisational activities.

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[50] http://www.energizeinc.com/hot/2009/09jul.html Accessed on Thursday, February 11, 2010
[51] http://learning.nationalserviceresources.org/mod/book/view.php?id=520&chapterid=235 Accessed on Tuesday, February 16, 2010
[52] http://learning.nationalserviceresources.org/mod/book/view.php?id=522 Accessed on Tuesday, February 16, 2010
[53] Adapted from Points of Light Institute website, http://www.pointsoflight.org/our-work/research/sbv accessed on February 9, 2010.
[54] Adapted from p. 22. Vantage Point. A PEOPLE LENS" 101 WAYS TO MOVE YOUR ORGANIZATION FORWARD. 2009. Available for purchase online at http://www.volunteervancouver.ca/content/people-lens and Timeraiser's main site: http://timeraiser.ca

A **Volunteer broker** or **brokering organisation** matches the needs of volunteers and nonprofit organisations.

Volunteer engagement includes motivation, meaning, quality of life, excitement, value-building and ownership, as well as unleashing the latent potential in people to become involved.[55]

Volunteer manager, also referred to as volunteer administrator, director, coordinator, leader, etc. is a professional who applies the best practices in volunteer management in compliance with nationally accepted standards to identify, strengthen and effectively maximize voluntary involvement for the purpose of improving the quality of life of individuals and of communities.[56]

Volunteer Roles

Episodic - complex term with several different meanings depending on the sector of involvement. [57]

1. an individual who makes a onetime commitment to provide assistance with no expectation for future participation; may also be known as spontaneous, emergent, drop-in or walk-in volunteers. Often assigned to low risk, low responsibility tasks i.e. ticket taker at a music festival; bus staff at a soup kitchen

2. Unaffiliated – an individual motivated by a sudden desire to help others, often in times of trouble i.e. health emergencies or natural disasters. These individuals may be able to offer a wide variety of skills.

3. Interim – an individual who gives concentrated service for a period of six months or less. Community service workers and high school, college or university students doing internships are examples. Health professionals working in international settings for specifically defined periods of times are another example.

4. Affiliated – an individual who serves an organisation or program for a specific continuous engagement and has been trained to provide a specific service.

Ongoing Episodic - a low risk, low commitment, low responsibility assignment or task; volunteer may return to the same assignment over and over

Short-Term – often project-focused with a well-defined beginning, middle, and end, or an event or project that is very time specific over a short period of time i.e. those who help with packing Christmas hampers or those who help with annual art, music or sports events or festivals

Seasonal – episodic, typically low risk, low commitment, low responsibility assignment or task that occurs on a regular schedule

Consultant or professional – highly-focused, high commitment, high responsibility assignment; usually time-limited, although may be an ongoing episodic commitment; usually project focused with well-defined guidelines, deadlines and deliverables. May be a **pro bono volunteer.**

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[55] Canada Volunteerism Initiative/Initiative canadienne sur le bénévolat. VOLUNTEER ZONE BÉNÉVOLES: FINAL REPORT. Volunteer/Bénévoles Canada, 2005. ISBN 1-897135-25-4. p. 8
[56] Volunteer Canada. Canadian Code for Volunteer Involvement. (Également disponible en français). 2006. ISBN 1-897135-52-1 p. 16. Accessed on Wednesday February 10, 2010.
[57] MAINTAINING THE PASSION: SUSTAINING THE EMERGENCY RESPONSE EPISODIC VOLUNTEER. 20 pp. p.3 Accessed February 25, 2010 from http://readyforcrisis.ca/resources/pdf/crc_disastermanagement_maintaining_e.pdf

Team Volunteering – a group of volunteers, who take on an assignment, project or program; may be a one-time commitment or an ongoing short- or long-term commitment

Virtual Volunteer – provision of service from an off-site location using electronic methods (phone, fax, internet, and email) to complete tasks; may be a onetime commitment, a short- or long-term commitment. Also called online volunteering, cyber service, telementoring, e-volunteering, and cyber volunteering.

Volunteering is the practice of an individual or group of individuals contributing time or talents on behalf of others, usually in their local community, without the motivation of financial or material gain. **Volunteering** is generally considered an altruistic activity, intended to promote good or improve human quality of life.

Formal volunteering is the provision of service through a group, club, or organisation to benefit others or the environment.

Informal volunteering is the provision of services directly to an individual who is not a relative. Direct provision of service is often not counted in official estimates of volunteer hours donated.

Volunteerism is the reliance on volunteers to perform educational, community, and social service work.

Work-place Giving is focused fund-raising by employees of a business or organisation that is directed by the mission, mandate or vision of the employer.

APPENDIX – Case Studies

Case Study #1: Volunteer Calgary

Volunteer Calgary has supported the development of volunteerism in the city for over 50 years. Its mission is "leading, promoting, connecting and strengthening volunteerism." **Volunteer Calgary** does this by:

- promoting the value of volunteering,
- connecting people to volunteer opportunities,
- strengthening the ability of the non-profit sector, groups and individuals to support volunteers; and
- providing leadership on issues relating to volunteerism.

Through its services and programs, **Volunteer Calgary** has enhanced the ability of more than 450 non-profit member organizations to engage volunteers and linked thousands of Calgarians with unique volunteer opportunities through its searchable database. More than 300 individuals are registered with their "board match" program. Volunteer Calgary also facilitates employee volunteering.

Their long-term vision is "see all Calgarians taking responsibility for creating a healthy and caring community by getting involved in local issues . . . [resulting in a] community [that] will reflect a warm and caring place where diversity is accepted, the basic needs of all citizens are met, and citizens routinely look out for one another."

Noting significant changes in the demographics of the city's population, and the pace of economic growth, **Volunteer Calgary** began to explore innovative ways to respond to these changes in 2007. The *High Skills Research Project* explored strategic volunteer engagement as a way to enhance and grow the capacity of the voluntary sector.[58] As noted in our discussion paper, research together with their own experience strongly supports that individuals want to be involved in volunteering with charitable and non-profit organisations; however, they want to use and develop their skills and experience in high-skills, non-traditional volunteer roles. "Strategic Volunteer Engagement" as **Volunteer Calgary** defined it "strives to elevate the engagement of volunteers to the strategic level such that volunteer engagement is considered as critical an input as funding and paid employees."

The pilot project explored what high-skills volunteer engagement would look like and what factors would be associated with the successful implementation of this strategy. It was premised on the notion that "this approach to organizational capacity-building could be promoted as a way of addressing human resourcing issues in the voluntary sector."

It involved 7 organizations representing a wide range of interests and that were of various sizes and at different stages in their organisational development. Based on an initial assumption that significant organisational changes would be required to support

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[58] Unless otherwise noted, this discussion is adapted from **Strategic Volunteer Engagement**, a four-page Volunteer Calgary document as well as from a personal interview with Laurel Benson, President and CEO of Volunteer Calgary, March 23rd, 2010.

the engagement of highly-skilled volunteers, the Research Project included either the ED or CEO of the organisations as well as the managers of volunteers.

In order to enhance organisational readiness and receptiveness to highly-skilled volunteers, nine workshops were developed addressing the following:

- The Canadian Code for Volunteer Involvement
- Developing Effective Policies and Procedures
- Trends in Volunteerism (presented by Linda Graff)
- Documenting Learnings/Evaluation
- High Skills Volunteer Position Design
- Developing a Recruitment Strategy
- Developing High-Skills Volunteer Training and a Parallel Strategy for Staff
- A Conversation with Colleen Kelly – Volunteer Vancouver (now *Vantage Point*)

As noted in our discussion paper, their project, which ended in October 2007, identified five important lessons learned:

Essential Strategic Leadership – The Executive Director must champion a culture and structure that supports the full integration of highly-skilled volunteers.

1. **Role and Place of the Manager of Volunteers** – Organisations need a staff manager of volunteers who is a member of the management team.

2. **Professionally Managed Volunteer Programs** - require an alignment of systems, policies and processes for paid and unpaid staff.

3. **Valuing Volunteers** – Volunteers and staff need to understand the "value" that volunteers contribute to the organization to overcome the outdated perceptions of "I am/you are just a volunteer."

4. **Readiness for an integrated human resource strategy approach** – To succeed, this approach needs to be integrated with the organisation's strategic plan.[59]

Based on these preliminary learnings, **Volunteer Calgary** plans to take the following steps to support the successful engagement of volunteers in high impact roles that advance the missions of individuals organisations and enhances the capacity of the sector overall:

1. **Encourage potential volunteers to engage their skills and talents in the voluntary sector through social marketing activity**

2. **Support the Advancement of the Profession of Volunteer Management**

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[59] Adapted from "*Integrated Human Resource Strategy Learnings & Implications from the High Skills Volunteer Research Pilot Project*" available online from
http://www.volunteercalgary.ab.ca/news_resources/high_skills_research.html

3. **Engage Executive Directors, Senior Management and Board of Directors in effective volunteer engagement and encourage adoption of Integrated Human Resources**

4. **Empower and inform volunteers to participate in designing volunteer opportunities that engage their skills and passion and increase sector capacity**

5. **Conduct practical research by working directly with nonprofit organizations and volunteers in their efforts to become engaged and integrating this knowledge into future programs and services**

These activities are part of their 2010 – 2012 Action Plan.[60]

Laurel Benson, President and CEO, will participate in this pilot project as a member of the Advisory Committee. As a leading organisation, they may be involved in a greater role.

More information about Volunteer Calgary from their website:
http://www.volunteercalgary.ab.ca/

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[60] Volunteer Calgary, Strategic Volunteer Engagement Action Plan 2010 – 2012.

Case Study #2: Vantage Point

Engaging People from a New Vantage Point
A Brief Case Study of Vantage Point's Decade of Transition

Vantage Point is an innovative capacity-building organization that sees communities and the world through a people lens. The voices of the people who have played a key role in their decade of transformation are reflected in this case study, to inform, inspire, and invite other voluntary organizations to travel along new paths toward building strong, sustainable community organizations with a focus on continuity of leadership while meaningfully engaging people.

With a mission **to inspire and build leadership in the voluntary sector**, Vantage Point "recognizes that people are the competitive advantage of the voluntary sector". Founded in 1943, and formerly known as Volunteer Vancouver, it is provincially incorporated as a not-for-profit society with charitable status federally and is expanding its scope to provide service across the country, with international links as well.

"People care about communities – not organizations"

At the turn of the millennium, Vantage Point's journey towards a new understanding of people engagement was quietly underway, with a new executive director, in a new era. Volunteer centres were asking themselves who their primary audience was (volunteers or voluntary organizations?). Technological advancements had eliminated time and geography as key structures in the way people work, live, and play, creating a virtual, global community open 24 hours a day. The standards of practice of volunteer resource management, and the assumptions they were based on, were starting to unravel. Let us begin with 6 assumptions Vantage Point challenged along the way:

1. There are not enough people willing to volunteer
2. Private companies must be paid for their expertise
3. A long-term commitment is needed to make the volunteer training investment worthwhile
4. Professionals are busy and they would rather write a cheque than volunteer their time & talent
5. If an organization takes volunteer engagement seriously, they need a single designated person to co-ordinate volunteers
6. Volunteers complement and support the work of paid professionals

Not enough volunteers? We heard from a Community Investment Director from a locally based, multi-national software company. The company is looking at employee volunteer engagement as a vehicle for contributing to community while developing human resources. With the average age of her workforce 26 years of age, she wanted a holistic approach that would open their eyes, feed their passions, and stretch their

minds. When she first began calling organizations, all she was being offered was weekend painting jobs, handing out water, and stocking shelves.

> **"I realized that it was not a problem of supply (available volunteers) but one of demand (meaningful opportunities)".**

Private Companies only want to give money? Given that corporations have can give "money, product, or people", this executive was also looking for a way to integrate these strategies so that the company's community investment could have more impact. She was interested a longer-term authentic approach that would empower employees, speak to their individual readiness, and involve a range of activities around an issue, along the following continuum:

Awareness   Understanding   Exposure/Contact   Engagement
                    Reflection/Integration

Long-term Commitment Needed? An independent management consultant, who volunteered with the Volunteer Leadership Development Program at Vantage Point, observed how much impact an intensive short-term intervention can be to the future of an organization. The long-term benefits of engaging a volunteer for a few of days to facilitate a strategic planning session, serve as a mediator between an executive director and board chair to clarify their respective roles, review a board governance model, or redesign an organization's web-site can be felt for years to come. Whether these people are retired executives, public servants, or small business operators, these external resources come to you with the skills you are missing and you do not need to provide training. They know the skill, they only require context about the organization.

> **"Having a seasoned management guru come in to your organization, at a critical time, without any preconceptions, and offer you two hours of their best thinking, can put you back on track for the next 20 years!"**

Prefer to give money rather than time and talent? A busy professional software designer talked about the importance of being connected to the community he lives in and how volunteering his time allows him to see and feel the difference he his making in a way that writing cheque can never do for him. While he continues to donate to a number of causes, he does not consider it a substitute for sharing his skills and time.

> **"With a busy schedule and the amount of travelling he needs to do, he is able to give to community, on his time and even when he is on the other side of the world. "**

Centralized Volunteer Resource Management? Great Human Resource Management practices are important in organizations in the public, private, and voluntary sector. While there may be someone responsible for ensuring the latest standards, legislation, and social trends are integrated into the practice, their role is to support all those who engage and manage people.

A former program manager at Vantage Point talked about the shift from providing training exclusively to Managers and Co-ordinators of Volunteers to a focus on organizational leadership. With a people lens, all those in paid and volunteer leadership roles in an organization will understand the principles of engaging members of the community in their work. Volunteer engagement ought to be a core competency for any position in an organization in the same way that computer literacy has become a core competency to most positions, as opposed to only those with administrative responsibilities. This approach must come from the leadership and this is why Vantage Point gears its services to Executive Directors/CEO's and Board Chairs.

One challenge was (as Volunteer Vancouver) the main contacts in member organizations were the co-ordinators and managers of volunteer programs. Developing a leadership constituency required intentional network building. While workshops and events continued for everyone, promotion was geared to Executive Directors and Board chairs. In fact the names of the new initiatives reflected the intended audiences such as the Board Chair Academy, leadership coaching program, and the Executive Director Learning Circle.

> **"In order to change our course, we needed to over-steer the ship for a while"**

Volunteers Complement and Support Paid Staff? With the changing demographics, Vantage Point saw it was important to stay relevant to different characteristics shared by new cohorts of potential volunteers wanting to engage with community. Whether we are talking about youth, baby boomers, or young retirees, we are seeing people motivated to offer newly acquired skills or share career-long experiences. The workplace and education system have produced people with more specialized skills with a focus on certification and professional credentials. This means that what they can bring to an organization is often outside the qualifications and skills-set of the more generalist - professional staff in not-for-profit and voluntary organizations. This emerging reality calls into question what kinds of task you might pay someone to do and what roles might be appealing to those wanting to volunteer their time.

> **"You can pay people to stuff envelopes"**

Walking the Talk:

Vantage Point integrated their evolving understanding of engaging community through a people lens in every aspect of their own work. When People were hired or leadership volunteers were engaged, everyone heard this philosophy as context. It was clear Program Directors were expected to identify opportunities that would appeal to passionate, talented people in the community. Everyone's work was focused on delivering the mission.

The impetus for this came from their executive director and was integrated into all positions descriptions, performance appraisals, policies, and practices. In 2009, external

resources performed 272 different roles at Vantage Point – including business analysts, curriculum developers, non-standard HR experts, designated Program Managers and strategists.

"We began to understand, when we clarified that specific expectation in the hiring process, Program Directors started to do their work differently. It became about learning from the exceptionally talented people in the community while those same individuals worked with the Program Directors to deliver the mission of Vantage Point."

Forks in the Road:

The transformation from the organization formerly known as Volunteer Vancouver to what evolved into what is now known as Vantage Point was, for the most part, a gradual, organic process. Yet it is marked by a number of forks in the road and intentional decision-making points. Some of these were referenced in our discussion regarding the assumptions that were challenged. Of the people who shared their reflections on the journey, the following emerged:

- Do we work with people to find volunteer opportunities or work with organizations to engage volunteers?
- Do we talk about recruiting volunteers or about engaging community?
- Does the name Volunteer Vancouver still reflect who we are?

Working with Volunteers or Organizations? It was becoming more and more uncomfortable to be investing time and resources in promoting volunteering when the gap was growing between what volunteers were looking for and what organizations were offering. Follow-up surveys with people they had referred to organizations indicated there was a relatively low level of satisfaction with their contact with the organizations and only a small percentage were actually engaged in volunteer work, as a result of these services. It became an ethical issue for Vantage Point. Was it right to set people up for disappointment?

"How could we offer a service (finding a meaningful volunteer opportunity) when we really had no control of the quality of the product?"

One former board member recalls many long soul-searching debates around the table to determine the most effective strategic direction to have the greatest impact on the not-for-profit and voluntary sector and in communities. At the prospect of moving exclusively to working with organizations, many board members were initially concerned.

"Are we abandoning part of our mission and are we going to be letting people down?"

No one was pressured into making a decision that would have such a profound impact on the future of the organization. There was explicit agreement that that individual

paces and levels of comfort would be respected in order for the shared vision to emerge.

Everyone agreed the govolunteer database of volunteer opportunities would be continued, as a self-directed tool for both prospective volunteers and volunteer-involving organizations. However, providing telephone or in-person support to people looking for volunteer opportunities would not be continued. People requiring support, such as those looking to volunteering as a means of integrating into Canada, people who want to improve their employment skills, or to re-enter the community, after institutional living, would be referred back to their settlement workers, employment counselors, and social workers.

Recruiting Volunteers or Engaging Community? A marketing professional we spoke with commented on the limitations that are created by the traditional tasks associated with the word volunteer. For many, the word means ongoing, direct service, in hospitals, recreation centres, and ball fields, and girl-guide troupes.

> **"Do you rebrand the word volunteer or do you adopt new vocabulary?"**

Organizations that engage community look at the people resources of individuals, companies, and the public sector. They look at the skills, expertise, and services required to achieve their mission. They create compelling assignments and projects that attract people who want to combine their skills and passions.

> **"When the community is engaged in the organization by people offering their time and talents, they become a network of champions who will open up even more doors"**

Volunteer Vancouver to Vantage Point The board of directors had many discussions over the decade about whether or not the name reflected this new way of engaging with community. Rather than changing their name early on, based on aspirations and a strategic plan, they waited until the transformation was well underway – until they had truly outgrown the name Volunteer Vancouver, as it had been known, and they had authentically grown into Vantage Point. There are still some who are concerned that the name itself does not describe what it does and that it does not evoke an intuitive understanding about the spirit of giving time to community.

In the course of working through all the information they were gathering, the leadership at Vantage Point discovered from the National Survey on Nonprofit and Voluntary Organizations **not-for-profit organizations** were challenged by:

1. No time to plan
2. Not finding the right board members
3. Shortage of volunteers
4. Financial uncertainty

In the community, potential volunteers were saying they were attracted to positions with:

1. A compelling mission
2. Ability to make a difference
3. Skills & experience required
4. Time specific

Vantage Point incorporated the last changes in the transition when the leadership understood clearly these talented people in community could be the capacity builders. There is an absolute correlation between what organizations require and what this group of specifically talented people can offer. The trick was to bring the two together. At Vantage Point they realized only strong organizations can significantly engage people – those paid with money and those paid in other ways.

In keeping with the mission, "We inspire and build leadership in the voluntary sector" the leadership at Vantage Point moved to working to inspire and build strong leadership in the community. One of the unique tactics of this building process is to engage people differently. That begins with a focus on the people we pay with money – primarily the Executive Director/CEO. If an organization is going to become strong, sustainable and focus on continuity of leadership, the Executive Director must build that organization through a focus on planning, building a strong and engaged board, and instituting good people practices.

For more information about Vantage Point, please visit www.thevantagepoint.ca

Case Study #3: Frameworks Foundation

Framework Foundation

Established in 2002, the mission of the **Framework Foundation** is to promote civic engagement of Canadians aged 22 to 35 through the merits of volunteerism.

Conceptualised by four friends, Anil Patel, Simon Foster, Nick Maiese, and Andrew Klingel, Framework discussed their initial volunteer engagement plan – *Timeraiser* - with Toronto-based volunteer agencies, academics, volunteers, peers, and charitable status organizations to elicit interest and feedback. Based on this first round of research, the **Framework** model was refined into the early summer of 2003. [61]

At this point, **Framework** engaged two MBA students, Bryan Santone and Ron Jagdeo, through a United-Way internship program. Their research was designed to improve the understanding of current trends in civic engagement and volunteerism, the mitigating factors for and against entry into volunteering roles, and to determine specifically how the target demographic (22–35 year olds with a post-secondary education in Toronto) might respond to the **Framework**-designed '*Timeraiser* event-model'. Four specific behaviour-groups were identified within the targeted demographic, including:

1. Volunteer - Givers
2. Volunteer - Non Givers
3. Non Volunteer - Givers
4. Non Volunteer - Non Givers

A 'Giver' was defined as "someone who had donated money towards a registered not-for-profit and/or charitable organization - sometime in the past three years." A 'Volunteer' was defined as someone who had given their time freely to work with a community organization in the planning or carrying out of a significant task – sometime in the past 3 years. The 'Non Volunteer – Giver' was thought to be the strongest candidate for involvement in voluntary activities through the **Framework** '*Timeraiser*' concept.

Focus group discussions explored how 'Givers' and 'Non givers' might perceive this kind of event, how likely they might be to participate, and how likely they might be to complete their volunteer commitment. Preliminary findings suggested that the giver/non-volunteer demographic was the desired target because they had no current volunteer commitments; Framework's proposed volunteer options did not represent an onerous time commitment and Framework proposed volunteer opportunities in the area of Culture and Recreation that this demographic found interesting. This research has informed **Framework's** volunteer engagement activities.

Timeraiser, the concept explored in their preliminary research, is a comprehensive volunteer engagement process that they describe as "part volunteer fair, part silent art auction and part night out" or "speed-dating" for volunteers. The cost of the event is $20.00 plus a minimum pledge of 20 volunteer hours to be completed in the next 12

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[61] Unless otherwise cited, the following discussion is adapted from Dom Bortolussi, Lead Author. FRAMEWORK FOUNDATION: A WORKING PAPER ON THE: FRAMEWORK TIMERAISER MODEL RESEARCH PROGRAM AND FINDINGS (2002- 2003). p.3-4. Accessed on March 31, 2010 from http://www.frameworkfoundation.ca/pdf/Research_TR_Design.pdf

months. Guests bid additional volunteers hours at a charitable organisation they choose for pieces of original art. Following completion of their volunteer hours, participants bring home the artwork as a reminder of their goodwill. *Timeraiser* has positioned itself as "a 'win-win-win' situation: A **Framework** agency will get the skills and expertise of a motivated volunteer, the participant will get a rewarding volunteer experience, and potentially a piece of original artwork as a reminder of their contribution to community."

The *Timeraiser* event facilitates connections between citizens, businesses, charitable and not-for-profit organisations and emerging artists. It seeks to cultivate engaged citizens by making it simple for individuals to find meaningful volunteer opportunities believing that engaged citizens are critical to building strong communities.

The silent art auction is the key component of the *Timeraiser* event. Art is not donated but purchased at fair market value from new Canadian artists. As Anil Patel states in a promotional video on their site, artists are often approached to donate art to support charitable causes. Purchasing their art and then using it as an incentive for volunteers benefits the Canadian art community by supporting individual artists. As of 2010, *Timeraiser* has invested over $310,000 in the careers of more than 450 artists across the country. The promotional benefits for individual visual artists whose work is chosen for inclusion in the auction are significant, as noted by Drew Kahn, artist in the same video available on the *Timeraiser* website.

Agencies wishing to become involved in a *Timeraiser* event submit an online auction which is reviewed by a jury. In selecting partner agencies, *Timeraiser* strives to provide event participants with a variety of interesting volunteer opportunities that will inspire them to volunteer in the long-term. A short, 9 minute video posted on the CivicFootprintTV Youtube channel describes how agencies may (re-)engage in their city's *Timeraiser* event[62]. The video talks agencies through the registration process, provides information about the event, including tips on how to successfully market the agency, and the follow-up process. Agencies are advised that they will be solicited for feedback in the post-event period, and will be contacted prior to the next *Timeraiser* event in their city to determine interest in future activities.

Prospective participants register on the *timeraiser.ca* website where they can explore the art gallery and obtain details about agencies that will be participating in their city's event. The highly interactive website encourages participants to get involved in their communities

Following the *Timeraiser* event, volunteer commitments are monitored by **Framework.** Participants are provided the contact of the organisation to which they committed their volunteer hours. In turn the organisation is given the contact information of the participant. Participants make the necessary arrangements to fulfill their commitment, and once they have completed the required number of hours, they claim their piece of art. Participants are encouraged to plan, track and adjust their giving, volunteering and participating efforts on the **Civic Footprint.ca** website with goal of the broadening their civic footprint; the "concept refers to each citizen's unique ability to contribute time and money to help develop stronger communities across Canada."

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[62] This channel has 26 uploaded videos available that not only walk volunteers, participants, agencies, and artists through the *Timeraiser* event, but also provide information about many different technologies that support *Timeraiser*'s ongoing work.

Since its launch in Toronto seven years ago the *Timeraiser* program has expanded nationally to Calgary (2006), Vancouver and Ottawa (2008), Hamilton and Edmonton (2009) with plans for further expansion in 2010. The *Timeraiser* website states that this expansion prioritized managed, meaningful growth focusing "on nurturing vital local partnerships, engaging enthusiastic and skilled local volunteers while going deeper into existing cities." *Timeraiser* has also engaged in community development by bringing together emerging community leaders from across Canada with the goal of providing a forum where participants were able "to share ideas and learn from a variety of diverse community impact initiatives across the country"; participants explored similarities and differences ". . . return[ing] to their city with new ideas of how to make the Timeraiser as relevant and meaningful to their community."

Due to their collaborative approach, at the end of 2009, *Timeraiser*, had successfully:

1. Generated over 51,000 volunteer hours
2. Invested $300,000 in the careers of emerging artists
3. Engaged 5,000 Canadians to pick up a cause; and
4. Worked with 250+ charitable organizations.

Further, they state that if you take into account "the total financial and social community impact . . . the program's return on investment is estimated to approach 220%, generating nearly $2.20 in 'social good' for each dollar invested in programming."

Their future goal is be present in every major Canadian city, to deepen their involvement in every community in which they operate, and to continuing to inspire people to become involved in their own communities.[63]

For further information contact, check out their various web presences:

Framework Foundation: http://www.frameworkfoundation.ca/

Timeraiser: http://www.timeraiser.ca/

Civic Footprint: http://civicfootprint.ca/

Timeraiser 's Public Gallery: www.picasaweb.google.ca/timeraiser

Facebook: www.facebook.com/timeraiser

Twitter: www.twitter.com/timeraiser

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[63] Anil Patel in MIXING VOLUNTEERISM WITH THE ARTS, accessed on April7th, 2010 from http://www.getinvolved.ca/watch/video/timeraiser