

Part 1

How nonprofits can recruit and manage Skilled Volunteers

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How to recruit Skilled Volunteers
How to pay them in ways other than money
How to select
How to manage
Tips

Preface

A Skilled Volunteer is a professional who offers specific expertise, for example in HR, accounting, strategy or marketing. Unlike volunteers who help with operations, Skilled Volunteers help management.

Why do you need Skilled Volunteers?

- *expertise that fills a gap* – recruit professionals with the expertise you need.
- *short term* – you don't need to nurture them over time like an employee. They do the project and then leave.
- *unbiased third party* – they can tell you the uncomfortable facts that your employees can't – because it's difficult to fire them. They aren't tied to the way things used to be like a founder. They don't have pet projects that a board member might have.
- *outside perspective* – They aren't caught up in the day-to-day crises, so it's easier for them to see the big picture. They can see your organization with fresh eyes.

Why we made this booklet

So that nonprofits across Canada can access skills, pro bono, from professionals in their local neighbourhoods.

How to recruit

Write a job description. Don't worry about being too specific about the problem; it's up to the Skilled Volunteer to diagnose the real problem and recommend solutions.

Circulate to:

- volunteer postings online (Volunteer Toronto, Charity Village)
- your own website, LinkedIn and Facebook
- your Board of Directors to forward to their connections
- local companies with a large head office - ask if they would donate the time of staff or circulate internally to find an employee who will volunteer on their own time
- local consulting firm, accounting and law firms for pro bono help to build their portfolio
- local universities and community colleges – alumni or business professors may have local contacts.
- Toronto has 2 pro bono consulting charities: [Management Advisory Services](#) and [Endeavour](#)

SAMPLE - Volunteer Opportunity – Marketing Professional

We are a non-profit organization (link to website) which needs a marketing professional with expertise in brand management to mentor us and help us plan our marketing strategy.

We need you to:

- rethink our website
- analyze the efficiency of our revenue streams and the churn of our donor portfolio

Project details:

- approx x hours/month, from now till December 201x
- timing can be when it's convenient for you — no scheduled meetings
- most communication by meeting, telephone and email
- initial orientation session
- must sign a confidentiality agreement and a volunteer contract.
- your primary contact will be (name of staff person). Other contacts include (names).
For biographies, see link to our website.

What's in it for you?

- contribute on a strategic level only — no implementation
- measure the difference you can make – results from your suggestions can be quantified for your resume (eg increased revenue by xx%, saved costs by xx%)
- meet new people outside your regular network
- give back to the community (... describe the cause of your non profit)
- honorarium \$xxx

What we are looking for:

- product management experience in the for-profit sector
- ability to find inexpensive solutions to problems
- copywriting and editing skills when reviewing our website and videos
- some exposure to managing a sales force (similar to our fundraisers)

Contact info: Jane Doe 222-333-4444

Submission deadline: Sept xx, 201x

How to pay

Understand what's in it for them

Treat Skilled Volunteers just like paid consultants, but pay them in ways other than money.

Recent graduates are motivated to:

- build their resume with concrete examples
- learn how to apply their education to a new industry
- learn how to be a consultant
- get specialized training
- gain entry level work experience. Obtain a reference.
- meet senior business people who could be a mentor.

Others will want to:

- connect with a cause because of personal or family reasons
- stretch intellectually
- reconnect with their education because their career path has gone on to other areas
- volunteer, but fear doing mundane assignments
- learn new skills (e.g. how to make a brochure in PowerPoint, how to create a website in WordPress)
- meet new people outside their existing network, connect with their neighbourhood, meet others who share common interests, camaraderie.
- reduce boredom with retirement
- sense of purpose
- fill time with meaningful, part-time volunteer work (money is no longer a motivator)
- see the difference they can make, get a sense of accomplishment (as an employee in a large organization, it is hard to measure the impact one person makes)
- share the expertise they have learned. Feel needed and important by demonstrating their corporate worth
- opportunity to network with Board members

Unemployed professionals who want to fill a gap in their resume

Caution: They may be perfectly qualified. But once they get a job, their motivation disappears which means they may disappear, even in the middle of the project.

For-profit consultants who want to build their portfolio

Caution for large nonprofits: They will want to place your logo on their website, are you ok with that?

Caution for small nonprofits: they may insist on following their own client management process which is designed for large organizations, but not small.

How to select

What to look for in any Skilled Volunteer

Soft skills such as:

- listening skills
- focuses on the needs of your nonprofit, not their own accomplishments
- uses language that you can understand and doesn't use big words to make themselves feel important. Candor, without being disagreeable.
- spirit of collaboration, willing to dig in and work with you to figure out the answer. Helps you think things through. Helps you set priorities.
- gives you a fresh perspective
- available time

All of the above, plus:

Governance Professionals

- 5 years on a board (or interacting with a board)
- experience with a variety of governance models
- willingness to adapt to different governance models
- experience with a Board similar to yours
- experience with Board/staff issues

Strategy Professionals

- 5 years experience in strategy development (for profit or nonprofit)
- experience working with similar organizations
- some knowledge of your sector
- can articulate a clear process for developing a strategic plan that works for you

HR Professionals

- experience in HR administration, policies, processes, benefits, health, safety and legislation
- ability to coordinate professional development programs
- experience with employee relations and resolution processes
- involvement in development of HR strategies

Marketing Professionals

- clear thinking and clear writing
- experience with the creative, artistic side of marketing
- experience with the number-crunching side of marketing
- constant experimentation, constant learning

How to manage

Mutually structure the relationship like a consultant.

If your Skilled Volunteer is an employee of large corporation (with no consulting experience) they will have expertise in their own area, but they may not know how to do consulting.

1. Clarify your expectations

You may also wish to ask the Skilled Volunteer to sign a confidentiality agreement.

Proposal

Volunteer Consultant – Marketing

Expected time frame: x months starting from (date)

Expected hours: xx hours

Expected format: (meetings, telephone calls, email)

Expected frequency of communications: (weekly)

Honorarium: \$xxx, paid at end.

Topics for investigation include:

- define our brand (clarify our message)
- help analyze results and set future marketing strategies

Expected benefits: save costs, increase revenue

Signature of main contact in non-profit:

Signature of Volunteer Consultant:

2. Finish with a close form.

Bring the project to a formal close – don't let it wither. This is the way you "pay" your skilled volunteer. It contains your results that your skilled volunteer needs to get a sense of accomplishment. It is your permission to put on their resume.

Every professional needs concrete accomplishments, but in a large corporation it is hard to measure the impact that one person has. If you are asked to be a reference, this form will ensure you give the correct information.

Project Close Form

Time frame:

Actual hours worked:

Honorarium: \$xxx

Project scope: clarified our message, analyzed results, set future marketing strategy

How success was measured:

- saved costs of \$xxxx/year
- increased revenue of \$xxxx/year
- CRA fundraising ratio from x% to x%
- defined our brand
- set marketing strategy for next x years
- re-allocated marketing budget to fit new strategy

Your signature

Add personal comments describing their personality characteristics that you found most helpful. Also, mention orally the areas that the volunteer needs to develop; this honesty is particularly helpful for recent graduates who are building a career.

Tips to prepare you

Orient your volunteer

Give them Part 2 “Orientation for Skilled Volunteers”. It will help them understand the nonprofit sector, how to give you advice and how to work with you.

Approach from a position of strength

You are offering a great opportunity. Many professionals spend most of their time dealing with implementation issues. Only a small part of their day job concerns strategic development, and this is usually the most fun. You are offering this professional a chance to work on the “fun stuff”.

Don’t expect professionals will be emotionally tied to your cause. Professionals love their profession and adapting to new challenges. Helping you part time is a great way to gain new experiences with no down-side risk to their career. In marketing, it is important for professionals to gain lateral experience in other industries, but in Canada there are only a few industries.

Don’t expect professionals will want to be Board members

Certainly you can offer a Board position if you discover that your professional wants to expand their skill set beyond their profession. However, if your professional wants to focus on honing their professional skills, keep them on as a coach.

Expect professionals to work faster

Professionals will expect work to be completed quickly, so prepare your staff. In marketing, professionals typically operate in a hierarchy, where decisions are made faster than in a consensus environment.

Sensitize your employees that the Skilled Volunteer may use for-profit language

Many concepts in the for-profit and non-profit industries are similar but the language used to discuss these concepts is different. For example, competitors vs alternate providers. Despite their best efforts, there is a high probability that your volunteer will inadvertently use business terminology. Prepare your employees to expect the occasional mix-up and focus on the underlying concept the volunteer is communicating.

Tips for HR projects

Help adjust expectations

Since resources are often limited in nonprofits, your Skilled Volunteer may need to adjust your expectation on new HR initiatives, training, benefits and salaries. They will need to be creative.

Establish upfront the depth of the work needed

Do you need your Skilled Volunteer to help with basic work (eg writing job descriptions) or strategic work (eg recruiting strategies)?

What are the signals that an employee needs coaching?

Do you see a supervisor who is struggling with staff? Perhaps there have been complaints about attitudes that affect morale and performance. Consider a Skilled Volunteer experienced in coaching.

Tips for strategy projects

There are as many ways of doing strategic planning as there are strategic planners

Most strategic planners have a well defined approach to strategic planning. Have a clear discussion about their approach, how the process will unfold, what the Skilled Volunteer will do and not do and what you and your organization will do. Get a sense of the time commitment and the elapsed time. Get a good description of the form of the final plan.

Provide background information

Your consultant may not be familiar with your sector or your organization. Provide recent reports on the sector, research reports, organizational overviews you've done for your Board and relevant website. The more information you can provide, the faster the consultant will get up to speed on your sector and your organizational issues.

The Board must be engaged early in the process

Strategy is a governance issue. Your Board should be comfortable with the process and prepared to engage as required. In most cases at least some Board members will have to dedicate significant time to developing a strategic plan.

This is an opportunity to step back and look at the big picture

You are inundated with day to day issues. Strategic planning allows you, and others in the organization, to step back and consider the big picture. This is often a first step in resolving other issues, e.g. Board development issues, organizational structure.

Tips for marketing projects

Remember that good marketing is deceptively hard

Marketing done well looks easy and obvious. It takes a lot of experience to make things look easy. It requires an outside perspective, to see you how your donors see you. It also requires tact, to tell you the uncomfortable facts that your employees can't.

Marketers are generalists OR specialists

When you are establishing the project scope, recruit a generalist marketer who has training in all aspects of product management. Eventually, you can recruit specialist marketers (eg writers, graphic designers) when you are ready to produce content.

Be sensitive to the distinction between marketing and fundraising

In large corporations, sales departments are completely separate from marketing departments. Sales people and marketers differ in personality type, skill set, emotional triggers and time frame for projects. A sales person would not be expected to handle a marketing assignment, any more than an accountant would. Similarly in large non-profits, the marketing and fundraising (ie sales) departments are also separate and equal. But in smaller non-profits, there appears to be an expectation that fundraisers will also do marketing. This sometimes causes a sense of unease.

Select carefully the other employees who will work with the marketer

Don't necessarily assume that your Director of Development should be involved, when in fact they may feel threatened. Select employees based on knowledge of the database, experience with clients, openness to new ideas, etc. Expect your employees to spend the same (or more) time on the project because they will be working together with the professional volunteer.

Report to one person, not to a committee

You recruited the Skilled Volunteer to give you objective advice. It is your job to communicate the advice internally, convince your colleagues and build consensus.

Other MAS publications

- Part 2 - Orientation for Skilled Volunteers
- Mid-size Nonprofits: Marketing Self Audit
- Fundraising Bootcamp – for EDs of small nonprofits
- Marketing Bootcamp – for EDs of small nonprofits
- Common Governance Problems
- Common HR Problems

About MAS Consulting

Management Advisory Services is a pro bono consulting service, operating in Toronto since 1993. Completing 200+ projects per year, we help small and midsize non profits in governance, strategy, HR, marketing, fundraising, finance, IT, executive coaching and facilitation. As a volunteer-run charity, MAS is funded by donations from satisfied nonprofit clients.

Our 50+ Volunteer Consultants are professionals who want to give back using the skills we learned in our careers.

Our mission is to build capacity in the non profit sector.

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If your nonprofit needs consulting help, contact MAS

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