

Part 2

Orientation for Skilled Volunteers

Companion to Part 1 –
How nonprofits can recruit and manage Skilled Volunteers

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Preface

What is a Skilled Volunteer

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

Typical skills needed:

It is harder to find opportunities for Skilled Volunteers. For every 25 on-line listings for regular volunteers (like drivers, docents, admin), you will find perhaps one request for a Skilled Volunteer.

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

Source: MAS Newsbites

Why we made this booklet

Any time a professional gets a job in a new industry, you are oriented by your new boss and peers. But as a volunteer, you will have to learn on your own. This booklet contains the stats and “soft stuff”, so that you can start giving back faster.

3 ways to be a Skilled Volunteer

1. **Board member and lead subcommittee**

Boards of Directors need members with a mixture of skills sets. For example, a board member with expertise in HR would attend all Board meetings and lead all meetings for the HR subcommittee. They would need to be an expert on all HR issues and how to address them. Being a Board member is a great way to learn about areas outside of your regular work.

2. **Subcommittee member**

If you want to improve your skills within your area of expertise, you might want to be a member of just the subcommittee. You will learn how to apply your skills in a real setting. And you don't have to attend all the Board meetings.

3. **Volunteer on a one-time project**

Being on a Board is a long term commitment. You can volunteer on a one-time project where you would act more like a consultant. Consulting skills and the concrete results you get from a one-time project look great on a resume.

Where to find opportunities

On-line volunteer postings

Check the websites for Charity Village and Volunteer Toronto.

Networking

Talk to your friends and colleagues. Reach out to your LinkedIn and Facebook connections.

Cold calling nonprofits is not going to be a good use of your time. Once a nonprofit identifies that they have a gap, they fill the gap – either through volunteer listings or networking. Once the gap is done, they move onto the next gap which will require different expertise. So the window of opportunity is short for any one nonprofit in any one area.

What's in it for you

How can the nonprofit pay you in ways other than money?

As a recent graduate, you may be motivated to:

- build your resume with concrete examples (eg “my project increased revenue by 10%”)
- learn how to apply your education to a new industry. Some professions value employees with experience in multiple industries. Volunteering is a great way to learn the nonprofit industry, without jeopardizing your day job.
- learn how to be a consultant
- get specialized training
- get entry level work experience
- meet senior business people who could be a mentor. Obtain a reference.

Others may want to:

- connect with a cause because of personal or family reasons
- stretch intellectually
- reconnect with your education because your career path has gone on to other areas
- give back, 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 your existing network, camaraderie, connect with your neighbourhood, meet others who share common interests
- reduce boredom with retirement
- fill time with meaningful, part-time volunteer work (money is no longer a motivator)
- see the difference you 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 you have learned. Feel needed and important by demonstrating your corporate worth.
- opportunity to network with Board members
- get a sense of purpose in life: what you do can help someone other than yourself.

Price is a signal

People expect to get what they pay for. As a Skilled Volunteer, how do you replace price?

Tell your nonprofit what you need in return. In order for staff to feel comfortable working with you, there must be an exchange for your service.

Being open and honest about why you want to volunteer allows your nonprofit to trust you.

Diagnose and triage

What a nonprofit asks for is not necessarily what they need. Your project can end up much different from what you originally thought.

Like a doctor treating a patient with localized pain, the pain may only be a symptom and the real issue is more serious or embarrassing. **It is your job as the expert** to dig a little deeper and find the real problems. Your nonprofit needs someone with specific expertise to diagnose their challenges and triage the most important.

At MAS, for about 1/3 of my clients, I deliver what they originally asked for. But for the majority of my clients, I end up uncovering deeper issues.

Nonprofit asks ...

“Facilitate a session”

Clients express their needs in different ways. Most describe it in term of a solution “We need help facilitating a ½ day Board meeting”. Rarely is the request phrased in terms of a problem that needs solving “we need to rethink our mission in light of declining membership or funding cuts”. Perhaps staff need to do more thinking about diversifying revenues before calling a big Board session?

“Spokesperson training”

They may ask for help training their ED to be a spokesperson, without realizing that the messages on their website are unclear. The website needs to be the foundation of a brand, and if it’s not clear and concise, well no wonder, the ED isn’t either. First they need a new website.

“We need more donors”

Perhaps your nonprofit needs more donations and they jump to the conclusion that they need more new donors. After you investigate, you may find they don’t need new donors. They just need to renew the donors they’ve already got.

You discover...

falling membership

no clear messages

acquisition or retention

Make a proposal

You’ve done your diagnosis. You have triaged the priorities. Summarize it in a proposal.

- list what needs to be done.
- the benefits (save money, make money, increase profile, clarify messages, save time, etc)
- the costs and the time commitment from you, from staff and from other volunteers. Probably, time will be the biggest cost.
- project completion date

This is when you remind them what is in it for you. Show how this proposal helps them and ... helps you.

When to walk away

Despite how you've convinced yourself that you have found the solution to your nonprofit's problems, allow your nonprofit to say no.

Hesitation about the project

They may realize that they have other priorities. Your nonprofit may disagree with your analysis.

Or you may be hesitant: be wary of nonprofits who want an external blessing for a decision they have already made, or who want to fire somebody or get you to deliver an unpopular message

Hesitation about you

It is nearly impossible for a nonprofit to fire a volunteer. And it is so awkward to manage a volunteer who means well but is not adding value. Instead nonprofit staff will not overtly disagree with you, but they will withdraw.

Not right for you

If you don't have the resources, the knowledge or the time to commit, admit it now. Here is an example in marketing. There are two sides to marketing – the creative side and the analytical side. Some marketers feel more comfortable on the creative side (writing brochures and designing websites). But what if you discover... after your diagnosis ... that the nonprofit needs help on the analytical side (they could need help crunching numbers on their revenue or calculate donor churn). If you don't feel comfortable crunching numbers, admit it now and find another volunteer to join you.

Overwhelming

Perhaps the project is too overwhelming. If so, divide it up into clear stages. This is important for you too. Otherwise, this project will get bogged down and you won't get what you need.

Chemistry

If the chemistry is wrong, walk away now before it gets started. At least you can feel good that you have given them a plan to implement. Say "I feel that we are not on the same wavelength, perhaps another volunteer can help you".

No staff assigned

A staff person has to act as the internal liaison. If this doesn't happen, it's a strong signal to walk away.

Nonprofit vs For-profit

Small nonprofits are more similar to small for-profits

This section explains the differences between the for-profit sector and the nonprofit sector. But remember, there are bigger differences within the nonprofit sector. Expect that the challenges facing small nonprofits will be more similar to the challenges of small for-profits (than to large nonprofits). Expect that large nonprofits will be more similar to large for-profits.

Nonprofits have 2 bottom lines

The financial bottom line and the social bottom line. Some employees are persuaded by suggestions that will improve the financial efficiency of the nonprofit. Other employees will be motivated by the impact on the cause. Both are important. Before making suggestions, be prepared to stress the benefits to which ever bottom line your listener is most focused on.

Strategic differences

	FOR profit	NON profit
Strategic goal	competitiveness	mission effectiveness
Success factors	market share growth rate earnings	management practices social impact cost efficiency
Values	innovation	accountability to public integrity

Conflicting measures of success

In the for profit sector, profitability is the way corporations measure success – for both employees and shareholders. In the nonprofit sector, different audiences have difference metrics. Is success measured by winning or having everyone play? Amount of money raised or hours being useful? Meals served or lives changed? Expect lively discussions about how to measure success.

Slower decision making

Expect a culture of consensus building and getting buy-in from a wide range of employees. Even the Board may be involved in decisions about operations. This slows down the speed of decision making, compared to the hierarchy in for-profit enterprises.

Nonprofit vs For-profit

Overlapping responsibilities

In the for-profit sector, who sets the direction and who does the work is clear. In non profits, that clarity is lacking because of the many roles that exist. For example, a volunteer can be on the Board of Directors supervising the Executive Director and simultaneously working on program delivery under the watchful eye of the ED. Life gets complicated, especially when that volunteer may be a big donor or a member.

Unclear qualifications

Some positions are filled by people who are willing to do it, not necessarily because they are qualified. What may be considered conventional wisdom can often be thwarted by a Board member who enjoys the prestige of being on a Board, but has little understanding of their role. As well, volunteers may self-select to do a job for which they are not qualified or are ill-suited by temperament; they need to be delicately handled.

Competitors vs partners

Other nonprofits within the same cause will be considered partners with differing mandates or territories. They will not be considered competitors, despite the fact that they are approaching the same donors. They don't compete over clients, but they do compete over donors. Here is an analogy: in a for profit corporation, internal departments don't consider themselves as competitors because they have the same goals but they actually do compete with each other over a finite budget. Similarly, nonprofits think of each other as internal departments within the same cause, with the same goals ... but they are competing with each other for a finite pool of donations. During your conversations, avoid using the term "competitors", instead use the term "alternate providers".

The vocabulary is different

Many concepts in the for-profit and nonprofit industries are similar. The language used to discuss those concepts is different. Different languages in different industries is common and is appreciated because of the new ideas it can generate. But in the nonprofit industry, business terminology can trigger unexpected emotion.

If you encounter an emotional reaction to a comment you make, check whether the reaction is to the concept or whether you inadvertently used business terminology. Or a more common reaction is the listener will quietly tune you out, avoid you and you will never understand what happened. Switching between for-profit and nonprofit languages may well be the hardest part of your assignment and confounds volunteers who have been in the nonprofit industry for years.

Nonprofit vs For-profit

Sales vs Fundraising

A for-profit sales department and a nonprofit fundraising department will be structured similarly. The personalities of employees are similar. The type of work is similar (e.g. closing deals, managing clients, long lead times).

What is different? The payer is not typically the recipient. Donors (eg. individuals, corporations, foundations) pay for the service to fill their own emotional needs. Funders (e.g. government) pay to fulfill a social goal. Service recipients receive the service either for free or at cost and have no connection to donors. The exception to this is arts organizations who sell performance tickets — the people who are paying are also receiving the service.

Expect that no one in a small nonprofit will understand the fundamental principles of your profession

Most of the senior staff will be experts in their own cause (eg seniors, at-risk youth) but may not know anything about HR, marketing or governance. For example, HR employees in for-profit firms may take for granted their written HR policies, which might not yet exist in a nonprofit.

You will need to be more creative

Due to limited resources in most nonprofits, you will need to offer creative and inexpensive solutions. For example, a small for-profit firm may be able to justify the hiring of a part-time HR manager when they reach 30 employees. Nonprofits typically cannot justify to their funders to hire HR resources till they reach about 100 employees.

Lack of infrastructure

Most donors and funders want to fund projects, not infrastructure. The nonprofit sector is significantly underfunded for infrastructure eg staffing, IT. This makes it more challenging.

What to expect

Nonprofits have a life cycle

Where is your nonprofit on this scale? Are they transitioning between stages? If your nonprofit is transitioning, there will be a lot more going on in other practice areas. They will need to work on their more foundational needs like strategy, governance and HR, before they can work on their marketing, fundraising or accounting.

High energy, everyone involved, no formal structure

Formalize mission, small staff, founder burn out

Formal board + committees, staff focus on managing

Professional management, strategic alliances

Stagnating, declining interest, lost funding

Under promise and over deliver

You need to earn credibility. Anyone can call themselves a marketer. Anyone can say they have HR experience. Everyone thinks they are an expert at strategy. In the past, your nonprofit may have been disappointed with promises from previous volunteers. That can make them hesitant about you.

Expect resistance

To staff in a nonprofit, an expert from the for-profit sector can be intimidating ... or perhaps irritating. This is a typical response in consulting. Marketing volunteers can expect resistance from fundraising staff who may feel threatened by making their results more transparent. Strategy volunteers can experience resistance from senior management who feel that external advice is a sign of their own weaknesses. Governance volunteers can experience resistance from Board Chairs and founders, who like the way things have been done in the past and don't want to change. It is almost guaranteed you will experience resistance from someone, somewhere in the nonprofit. Don't take it personally.

Be sensitive

Remember that you may not understand what it means to be brought up with a different set of social norms. Or to have lived below the poverty line your whole life. Or what it's like to live with someone who needs constant care because of a medical diagnosis. Analogies you use to explain things based on your own experiences may be completely irrelevant to your nonprofit.

Ask lots of questions

How did the project get started? Talk to all possible decision makers and don't accept the first answer you get. Learn everything you can about the organization through their website, Google, CRA website, board memberships and annual report.

What to expect

Expect to learn

For example, how to motivate employees without using salary and benefits as a motivator. You can practice by learning how to motivate other volunteers.

Expect to feel good

Helping others can give you a sense of vitality and improve your mood. Like a runner's high.

The nonprofit sector is very accepting of diversity

Obstacles that you encounter in the for-profit sector (eg age, gender, disability) are less of an issue.

Nonprofits may not know how to manage you

You are not a typical volunteer. Most nonprofits have a mid-level employee called a Volunteer Coordinator who recruits and manages volunteers for events and operations. Professional Volunteers are managed by senior staff who are juggling other responsibilities and may not follow the procedures that the Volunteer Coordinator has established.

Dress in “Friday Casual” clothes

Appear professional, but not intimidating. Minimal jewelry.

Find out who the real client is

Your contact may be a staff member, but they may not be the decision maker. This means that decisions can be undone later by others who are not immersed in the nuances of the project.

Quantify your effort

Establish the value (not the cost) of doing the work. Establish the context of your contribution and get it acknowledged. Compare your contribution to commercial rates. Draw up a project plan and put your hours (and client hours needed) on a calendar, then add slack time. At the end, quantify your contribution in hours that you have donated.

Be the project manager

Act as the keeper of the project and its timetable. Track your hours. Since you are a valuable resource, you should be treated appropriately.

Do not commit to doing the work just because the client wants it. Do it because its the right thing to do. Ask yourself, if you were billing commercial rates, does this project make sense in terms of potential value?

Tips for HR volunteers

Typical project

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

HR needs vary based on # employees – scale

HR work to size

One of the challenges with the smaller nonprofits (<20 employees) is ensuring that they have the capability to implement what you put in place and importantly to follow through over the longer term. The challenge with larger nonprofits is ensuring they do not try to do too much.

Expect resistance to a corporate HR approach

Many nonprofit employees believe in their cause and are internally satisfied by the good they are doing. They enjoy an informal culture and may resist your attempts to formalize procedures or implement corporate-type programs

Establish upfront the depth of work you want to do

Do you want to do basic work like writing job descriptions and writing an Employee Manual? Or do you like strategic work such as designing recruiting strategies and a succession planning framework? Be clear, otherwise you may end up not enjoying the work.

Tips for governance volunteers

Typical project

Board orientation workshop	40%
Tips to incorporate startups	15%
Tips to apply for charitable designation	10%
Assessments, explain governance models, etc	45%

Role of Board vs role of management

In small nonprofits, expect a lack of clarity over roles. This can cause a sense of unease in the ED which you can help reduce.

Governance needs vary based on their stage in the life cycle

Startups need help with everything. Stagnating boards need a plan for retaining board members. Most organizations are successful at the start with very informal governance practices and procedures. But over time, due to increasing complexity, risk or the involvement of outside stakeholders (partners, funders) the governance must mature. Many funders are putting pressure on organizations to improve their governance practices.

Board composition

Many small nonprofits need help with thinking through what skills, expertise, attributes, connections and experiences they need on their board.

Tips for strategy volunteers

Understand your nonprofit's experience with strategic planning.

Do they have a strategic plan? Do they use it? Do they understand how much time can be expended in the effort?

Adapt your planning process

Ensure your process will work for the organization. Be flexible in your approach. If you are coming from a large for profit, don't impose a corporate discipline or process. Understand that there may not be the sort of data you are used to having. A facilitated planning process works best for most clients - ensure that the time is spent on high value conversations. Document the process and the decisions. It is critical that the strategic plan be a tool that the organization can use.

Do your homework

Troll the internet for background information. Ask the right questions of the staff and Board. Identify the critical issues and ensure they are addressed. Like all groups, it takes some preparation to get people to engage with strategic issues.

Translate strategy to action

As part of the assignment, develop an action plan or 1 year operating plan that takes the strategy to action. Work with the people who will own the deliverables to develop the plan. Many organizations have worked with strategic planners to develop a strategy but then struggle to figure out how to move that to deliverables and action plans.

Awareness

Increasing awareness almost always comes up, be clear why. Is it awareness with policy makers about the cause? Or awareness with donors and funders about the nonprofit?

Are your marketing skills transferable?

The marketing skills needed in the financial services and pharmaceutical industries are highly transferable. This includes

- offering a service (vs a product)
- communicating using words (vs visuals)
- building relationships with clients (finding gaps in Touch Points)

For nonprofits, branding is shaped less by advertising (which is the typical way to build a brand) and more by experiences received by service recipients and donors.

Only one of the 4Ps is relevant

Promotion - inexpensive promotion. Your nonprofit will rarely need help with expensive promotion such as broadcast advertising, product development, product packaging, pricing coupons, distribution channel management, store layout or marketing research.

Don't waste time with a traditional marketing plan

Because of the emphasis on promotion, many sections in a formal marketing plan do not apply. As well, most nonprofits are not accustomed to the formality nor the “lingo” of a traditional marketing plan because there is no audience of experienced marketers. Most nonprofits are service-oriented organizations with a single product line that need tactical advice.

No one understands the science side of marketing

Because of the emphasis on promotion, most nonprofits hire employees with expertise on the “art” side of marketing. Do not expect that there will be any employee who is capable of the science side of marketing. It will be up to you to crunch the numbers. Your nonprofit will need help analyzing the efficiency of their revenue streams and calculating the churn in their donor portfolio. See “Mid-Size Nonprofits: Marketing Self Audit”. Without this analysis, your nonprofit will repeat what they did the previous year without a clear marketing strategy.

What do they want more of?

After I view a new client's website and their CRA filing, this is my first question.

- recipients (e.g. an arts organization selling tickets to a performance, a seniors home).
- volunteers (to help provide the service or to help with admin).
- revenue (donations from foundations, corporations, donors and government to help pay for a service that recipients cannot afford)
- members (the head office of an association which receives dues from members)
- general awareness (for nonprofits with advocacy and education in their mission)
- awareness of their own nonprofit

Ask your nonprofit to place them in descending order. Even better, quantify each out of 100.

Report to one person, not a committee

Your job is to give objective advice. Your contact should communicate your advice internally, convince their colleagues and build consensus.

Marketing needs vary based on fundraising costs (not revenue)

Don't be tempted to compare nonprofits based on revenue (many nonprofits receive funding directly from governments) or cause (the deliverables are the same, regardless of the content of the message). The easiest way to compare is by the amount of money they spend on fundraising costs. Why? It's a proxy for staff expertise on marketing. And it's a proxy for the diversity of their revenue streams (which require more marketing sophistication). The transition between small and large is about \$100,000/year in fundraising costs and staff time.

Focus on the deliverables, not the marketing process

The process of marketing starts with reviewing profitability, competitors, key features and audience segments to determine a Unique Selling Proposition. This conversation is identical with all nonprofits. **If your nonprofit is large**, your deliverable would be a marketing audit which contains the strategy; middle management would then work with subcontractors (e.g. graphic artists, writers, webmaster) to implement the strategy.

If your nonprofit is small, your deliverable is refreshing their website. You still do the same strategic thinking, but skip the "internal document" and embed the strategic thinking directly into the website. Websites are more tangible and nonprofits will be willing to spend the time. You may have to learn how to do everything yourself because they cannot afford subcontractors. (eg creating website on Wordpress, writing and designing brochures on PowerPoint). Or find other volunteers who can.

Typical marketing project – small nonprofits

Their approach is "help us we have nothing". I audit their previous work and write and design a new website. Once the website is approved, I write and design brochures, donor presentations, donor letters on PowerPoint. Then I give tutorials on Wordpress.com and PowerPoint so that they can update themselves. It takes about 25 hours of my time and 20 hours client time. As a comparison, paid consultants would charge \$3-\$10,000 and use technology not available to nonprofits who then have to return and pay for updates.

Typical marketing project – mid and large nonprofits

Larger nonprofits are already doing the basics well, they want to "work smarter". They need help to analyze the efficiency of their revenue streams, the churn in their donor portfolio, gaps in their Touch Points and how to structure a marketing department. See "Mid-size Nonprofits: Marketing Self Audit".

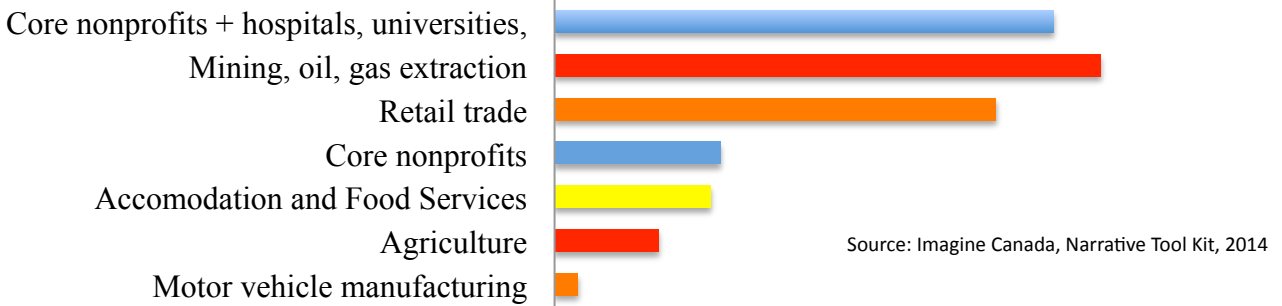
Good marketing needs the foundation of good strategy, good governance and good HR

The marketing challenge for many nonprofits is similar. The deliverables are similar. So why do some marketing projects go more smoothly than others? Usually, it has nothing to do with marketing. For those nonprofits who have concrete strategy, good governance and fair HR practices, a marketing project can proceed smoothly. For other nonprofits, it may be a better use of their time to fix their other "foundational" issues before spending their time on marketing.

The nonprofit industry in Canada

Nonprofits are a major sector in Canadian economy

Annual revenues exceed \$176billion. At 8.1% of our GDP, the nonprofit sector is larger than the automotive and agricultural sectors.

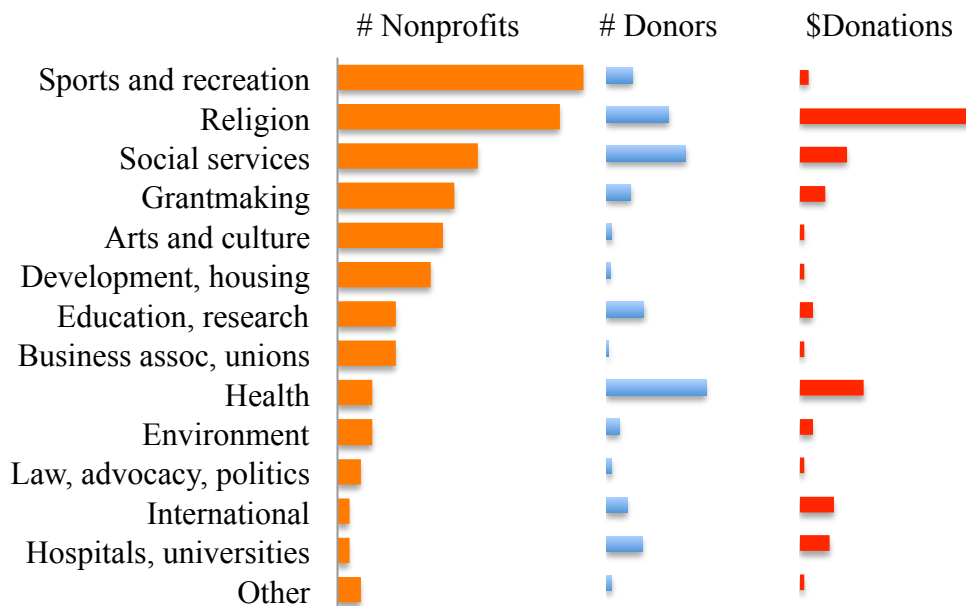


There are 2 million employees, which represent 11% of the Canadian workforce. Over 13 million Canadians volunteer; in fact half of nonprofits are run entirely by volunteers.

Size of your cause

Keep in mind how the cause for your client fits within the Canadian nonprofit sector. Sport and recreation nonprofits comprise the largest number of nonprofits but generate very little donation dollars (mostly volunteer hours). Conversely, there are fewer health organizations but they are very successful in attracting donors and generating donations.

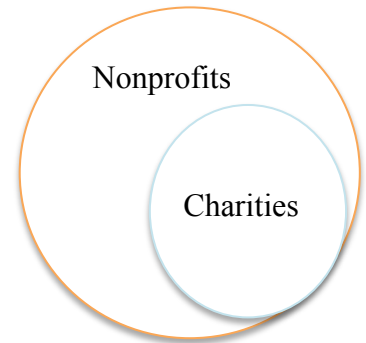
In the nonprofit industry, there is no correlation between the number of nonprofits (orange column), the number of donors (blue column) and where the money goes (red column).



The nonprofit industry in Canada

Not all nonprofits are charities

All 170,000 nonprofits in Canada are exempt from tax, have no shareholders and operate for purposes other than profit. About 50% of nonprofits stay as nonprofits because they are fully funded by members (e.g., sports clubs, associations, condos). The other 50% of nonprofits (eg. homeless shelters, refugee services) do not receive enough revenue to fulfill their mission. To encourage donors to donate to them, they apply for a charitable designation from the Canada Revenue Agency so they can give tax receipts.



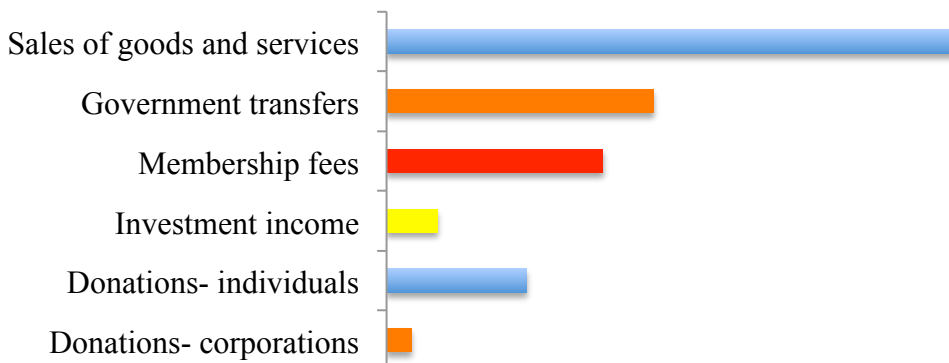
5% of nonprofits generate 85% of the revenue

The remaining 95% of nonprofits, who make less revenue, really need the help of professional volunteers.

	# Nonprofits	\$ Revenue
Small <\$1million/year	95%	15%
Medium \$1-\$10million/year	5%	25%
Large \$10million+/year	<1%	60%
Total	170,000	\$112billion

Donations generate a small part of revenue in the nonprofit sector

Most revenue comes from the sale of goods and services and from government transfers.



Source: Imagine Canada, Narrative Tool Kit, 2014

Other MAS publications:

- Part 1 – How nonprofits can recruit and manage 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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