Skilled-Volunteering 101:

Is Your Organization Ready to Engage?

In 2009, with support from Capital One, Common Impact conducted a survey of over 185 nonprofit leaders and found that the majority of nonprofits viewed budgetary constraints and limited access to expertise as key barriers to building organizational sustainability. Since then, as Common Impact and Capital One have each had conversations with nonprofit executives, we have continued to hear that access to skills and budget are key barriers to building stronger organizations.

Speaking with Executive Directors, we have heard that most of them clearly understand how skills-based volunteering is an effective way to engage talent they otherwise couldn't afford – but what they are less sure about is how to effectively engage this resource. According to a 2009 survey from Deloitte, 72 percent of nonprofits strongly agreed that skills-based volunteers would help increase their impact, yet almost a quarter of these organizations say they had no plans to engage skills-based volunteers.[1]

In an effort to close the gap between nonprofits' need for skills-based assistance, and their ability to leverage this under-utilized resource, Common Impact and Capital One partnered to generate Skills-Based Volunteering 101: Is Your Organization Ready To Engage? This handbook will help your nonprofit answer the following questions:

- Is my organization ready for skills-based volunteers;
- What are the characteristics of good skills-based volunteering projects;
- What are examples of successful skills-based volunteering engagements; and
- What resources are available for my organization to use when assessing its readiness, and defining a skills-based project?

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[1] Deloitte. 2009 Executive Summary: Deloitte Volunteer IMPACT Survey.

Is My Organization Ready for Skills-Based Volunteers?

With a combined fifteen years of experience connecting corporate volunteers with local nonprofits, Common Impact and Capital One have both found that nonprofit readiness is a crucial component of successful skills-based engagements. Yet, according to Common Impact's nonprofit application data, only about one in four nonprofits is ready to engage skilled-volunteers.

So, what is readiness, and why is it so important to successfully engaging skilled-volunteers? Organizations that are ready have shown their programs get results and they also see the value that deep expertise and experience can bring to their organization. These organizations understand their challenges, and want to apply the time and talent of skilled-volunteers to identifying solutions.

Common Impact looks for readiness to ensure that value will be delivered to all participants: skilled-volunteers derive value from giving what they know, while nonprofits get access to expertise that helps them solve a pressing organizational need. Ultimately, Common Impact finds that one great experience can generate short and long-term returns for nonprofits and skilled-volunteers.

Common Impact's post project surveys, for example, capture some of the value generated from successful partnerships: 83 percent of nonprofits say their skilled-volunteers delivered a solution that will have a "high impact on their mission" and 75 percent of nonprofits learned new skills from their engagement, transferring knowledge that will now reside within that organization for years to come. Common Impact has also found that 90 percent of its skilled-volunteers see that their work with the nonprofit "made a real difference to the client" and over one-third of skilled-volunteers have stayed engaged with their nonprofit partner as board members, mentors, or advisors, providing on-going access to skills that will help the organization continue to adapt and succeed.

On the other-hand, nonprofits that engage skilled-volunteers before they are ready can find the drawbacks to be considerable. Some organizations find the value of their skilled-volunteer engagement was not worth the time or money spent; other organizations find solutions delivered are a mismatch for their needs; while other engagements may leave skilled-volunteers feeling under-utilized, under-appreciated, or frustrated. Any of these outcomes can have real consequences for the nonprofit's reputation as an organization that can effectively leverage outside resources to deliver quality services most cost-effectively.

As Common Impact screens and selects high-potential nonprofit organizations, we look at two levels of readiness: organizational and project readiness. Organizational readiness means a nonprofit can leverage skills-based volunteers' work to better meet their mission, while project readiness indicates it's the right time for the organization to engage internal and external resources to address the specific challenge that the organization has identified. During our decade of work, Common Impact has found that when both types of readiness are in place, skills-based projects are set up to succeed, providing mutually beneficial experiences that unlock the potential for long-term relationships between nonprofits and skilled-volunteers.

Organizational Readiness: Will Your Skills-Based Project Generate Mission Momentum?

As Common Impact meets with dozens of organizations each year to determine their organizational readiness, we look for the following five characteristics of readiness: strong executive leadership; potential to create deep social impact; effective relationship building; organizational stability; and strategic engagement of skilled-volunteers. We have found these to be strong indicators of whether an organization can build on the work of skills-based volunteers to move their mission forward. Below we've provided a definition of each criterion, in addition to specific steps your organization can take to ensure you are ready to engage skilled-volunteers.

Criterion	Definition	What We've Seen That Works
Strong Executive Leadership	Conveys a strong social vision, energizes and listens to stakeholders, and leverages opportunities to innovate and meet changing client needs	• When first meeting skilled-volunteers, share your vision and road-map for how your organization plans to realize this vision. • Treat this first meeting as a "donor pitch" with three goals: (1) engage your skilled-volunteers in your vision for the future; (2) communicate openness to their insights about your organization; and (3) convey your desire to partner together to improve how your organization meets community needs.
Potential to Create Deep Social Impact	Takes a compelling vision, breaks it into programs that work, and hones the model over time to achieve the mission	• Have nonprofit leadership communicate the story of how the organization began – focus on how programs developed and how they serve community needs. • Draw a clear connection between the work your skilled-volunteers will do and how it will benefit the people your organization serves.
Effective Relationship Building	Leverages external resources, engages people with different points of view and experience, solicits feedback, and sustains long-standing partnerships	• Think of skilled-volunteers as short-term staff and provide training, exposure to programs, and introductions to staff. • Learn about your skilled-volunteers and their motivations: ask about their background, interests, skills, and goals for involvement – then develop a role that meets these objectives. • Ask about their experience during, and after, their involvement – the feedback provides an opportunity to refine skilled-volunteer management and shows that satisfaction matters to your organization.
Organizational Stability	Solid financial and operational footing, with no significant management, staff or board turnover in the last few years	• Skilled-volunteers want to help a strong organization build a foundation for on-going sustainability. Sharing testimonials, outcomes data, or asking a client to share his/her story with your skilled-volunteers; are all effective ways to convey this. • Connect skilled-volunteers with organizational leaders, tenured board or staff and ask them to share what keeps them engaged – information about the great work you are doing now will help skilled-volunteers see how your organization is poised for future success.
Strategic Engagement of Skilled-Volunteers	Connects the work of skilled-volunteers to the organization's ability to strengthen its foundation for greater sustainability	• Skilled-volunteers want to know how their skills will help move the needle on your organization's ability to meet its mission and vision. To convey this, share information from your strategic plan, board retreats, or other planning exercises and define how volunteers' expertise will help address a specific issue. • Use every meeting as an opportunity to communicate that your skilled-volunteers' expertise is essential to cracking an organization-wide challenge – and be specific about the benefits your organization will receive after solving it.

Project Readiness: Is Now the Right Time to Tackle This Organizational Challenge?

Common Impact also looks for four characteristics of project readiness; these criteria ensure that it is the right time for the nonprofit to engage internal and external resources to address this specific challenge.

Criterion	Definition	What We've Seen That Works
Completed Pre-Project Groundwork	Defined project goals and success measures, and clarity on what skilled-volunteers need to know in order to start their work right away	• Create a "prep-pack" – all the information skilled-volunteers need to know to get started on the project. For example, if your organization were starting a website project, provide examples of websites your organization likes, include font and color-scheme preferences, and provide your logo in electronic format. • Provide these materials ahead of time so skilled-volunteers can come to your first meeting with specific questions and spend the bulk of the time digging into project goals and scope.
Clear Buy-In and Decision-Making	Consensus across stakeholder groups about the value of the project, and clear roles and responsibilities defined for all project stakeholders	• Staff and board, as needed, have agreed on the value of spending organizational resources on the project your organization has in mind – a great way to show this is inviting staff and board to the project kick-off and having them share why the project is considered high-priority by all. • Define stakeholder roles and responsibilities: who needs to give feedback during the project; who can review and sign-off at critical milestones; who only needs updates on the project timeline? Be able to provide these answers at the kick-off. • Decide who will be the project decision-maker. Most projects encounter a few points when one person will have to reconcile different points of view. Defining who will "make the call" keeps the project moving forward.
Post-Project Support Plan	Brings staff up-to-speed on the tools or systems delivered by skilled-volunteers, and dedicates resources to maintaining the results of the project once in place	• Define who who will maintain what your skilled-volunteers deliver; this is critical to the long-term value of the project. For example, if your skilled-volunteers are delivering a database, who will enter information? Who will make sure the data is correct? Identifying this person (or people) before the project begins allows them to ask questions along the way and learn from your skilled-volunteers. This way you won't find yourself with a great new database with the capability, but not the data-quality, to generate the reports you need. • Consider working with your skilled-volunteers to develop a training plan for staff; this further engages volunteers and ensures that multiple people on staff know how to use and maintain what the volunteers have delivered.
Defined Project Leadership	Designate a point-person with the time, tenure, and project leadership skills to manage the project effectively	• The most successful skills-based engagements have an effective nonprofit project manager at the helm. This person provides one point of contact to the skilled-volunteers, connects them with the information and resources they need for their work, and helps manage the expectations and timeline of the project. • If the project lead is not the project decision-maker, the lead should engage the decision-maker often to make sure the project is aligning with the decision-maker's goals.

What Are the Characteristics of a Good Skills-Based Volunteer Project?

Now that your organization has determined it's ready to engage, the next step is to make sure your project is a good match for skilled-volunteers. Thinking back on over 500 engagements, Common Impact and Capital One identified the following themes of successful skills-based projects:

- *Clearly Defined Scope:* A written document that outlines what is in – and out of – scope will ensure all parties are on the same page about what is included in the project. For example, a website project scope might include a proposed site map, a list of target audiences, and preferences about color scheme and photo placement; this will ensure the website project doesn't get too big, increasing the duration or complexity beyond what the skilled-volunteers can take on.
- *Two-Way Sign-Off:* After generating the scope document, the main project stakeholders and skilled- volunteers can review the document and sign-off during the initial project "meet and greet". A best practice: specify in the scoping document that if additional needs surface beyond what was defined in the original scope, that they will be captured by skilled-volunteers for a follow on project. While it's typical for additional needs to surface during a project, keeping the scope in check ensures the skilled-volunteers aren't being asked to commit more time than they had initially anticipated, which is key to delivering a successful experience.
- *Defined Deliverables:* Clearly articulating what you would like your skilled-volunteers to deliver at the end of the project provides a clear direction from the start. For example, if your organization wants an analysis of a new market, what data and information do you need to make a decision after they deliver their final report? If your skilled-volunteers are building a new technology system, do you need training materials to teach your staff how to use the new technology? The more information you can provide upfront, the better your skilled-volunteers will be able to meet – and exceed – your expectations.
- *Identified Project Milestones:* Defining project milestones – both timing and what will be delivered at each point – allows skilled-volunteers to have a clear sense of what your organization needs from them and when; clear milestones also allow your organization to share the project timeline with internal stakeholders so they know when their time and input will be needed. We find four milestones are typically sufficient:
    - ◊ Kick-off: introductions, review of scope and discussion of deliverables, Q&A
    - ◊ Milestone One: review draft of project deliverables, gather substantial feedback, Q&A
    - ◊ Milestone Two: review nearly final deliverables, gather feedback to tweak and finalize
    - ◊ Close-out: presentation of final deliverables, training (if needed), thank you and recognition
- *It's Not Time Sensitive*: If time is of the essence, hiring a consultant is always an option. However, if your organization is looking for a way to build mutually beneficial relationships while also reducing project cost, skilled-volunteers are a great option – but the trade-off can often be the project timeline. Since skilled-volunteers are usually contributing their free time to the project, and schedules can always change, picking projects that are not time-bound are your best bet. If your organization has a project that you would like to sync up with a specific date – say the start of the school-year – be sure to share that with your skilled-volunteers ahead of time; but remember, even the most attainable project plans can get unexpectedly waylaid!
- *Can Be Completed Remotely:* Skilled-volunteers tend to contribute their time after work-hours or on weekends, so selecting a project that can be completed largely offsite will increase the likelihood of finding volunteers for your project.
- *Minimized Risk:* Some projects require the nonprofit to provide skilled-volunteers with access to business-critical data; when this is the case, consider how to mitigate these risks. For example, when working with skilled-volunteers on developing a new website, make sure site content is backed up in case the new site launch isn't successful the first time.

Tips for Ensuring Your Project Will Drive Two-Way Value

If your organization has a project that meets the characteristics above, consider these tips. They will further ensure the project you have selected is a good fit for your organization and skilled-volunteers:

- *Linked to Organizational Planning:* If your project stems from your strategic plan, feedback from organization-wide retreats or surveys, or surfaced in board or other leadership planning exercises, your project is likely linked with a critical business need; explain the strategic connection to your skilled-volunteers, and it will generate excitement and commitment.
- *Reasonable Time Commitment:* Common Impact finds that most skilled-volunteers can contribute about one to two hours a week, and that four to six months allows enough time to complete a significant project without asking too much from the volunteers. However, before engaging skilled-volunteers, be sure to ask them how much time they can give to your project; this will drive what is a reasonable scope, and if the project is a good fit for them to complete.
- *It's Easy to Give What They Know:* Making it easy for your skilled-volunteers to work with your organization shows them how much you appreciate their time and expertise. When thinking about making it easy, consider these ideas:
    - ◊ Be flexible: Skilled-volunteers are usually contributing their free time, so schedule meetings and calls at times that work for them; this may be lunch, after-work, or weekends.
    - ◊ Define the time commitment and stick to it: once you've defined the hours skilled-volunteers can contribute to your project, keep the scope in check. Make sure you aren't asking for more time than your skilled-volunteers originally committed.
    - ◊ Identify a point person: multiple stakeholders may need to provide input into the project, but channeling this information through one designated person streamlines communication, making it easier for your skilled-volunteers to focus on the project.
- *Can Be Broken Into Phases:* Because skilled-volunteers like to work offsite, and tend to spend after-work hours or weekends on their projects, projects that can be broken into distinct phases allow skilled-volunteers to give time when they can. Using the milestones below, consider the following questions in order to phase your project:
    - ◊ Kick-off: What are the questions we need to discuss with our skilled-volunteers to get them started in the right direction?
    - ◊ Milestone One: What information does our organization need to see at this stage to provide concrete feedback to our skilled-volunteers so they can deliver what we need?
    - ◊ Milestone Two: What needs to have been decided in order to have a nearly final deliverable?
    - ◊ Close-out: What do we need to do ourselves, or with our volunteers, to ensure our organization can maintain what our skilled-volunteers deliver?
- *Delivers Value to Volunteers:* Shaping your project to provide benefits to volunteers generates lasting connections. Common Impact finds skilled-volunteers often want to learn new skills, meet new people, or get involved with an organization near where they live or work – but the best way to find out volunteers' goals is to ask upfront – and to structure the project to deliver.
- *Easy For-Profit → Nonprofit Skill Transfer:* If your skilled-volunteers are coming from the for-profit sector, make sure their expertise transfers easily; some skills require more background knowledge of the nonprofit sector in order to apply them most effectively. For example, technology skills tend to be easy to adapt once skilled-volunteers understand your model, project goals, and budget. Projects requiring finance skills on the other hand, require more ramp-up time, since third-party funding dynamics may be unfamiliar to private sector skilled-volunteers. Since skilled-volunteers often have a limited time horizon for project work, ramp-up time will reduce the time they have to produce. As a result, ensuring skills transfer easily is an important element of generating two-way value when engaging skilled-volunteers from the for-profit sector.

What Are Examples of Successful Skills-Based Engagements?

To help your organization get a sense of what kinds of engagements are successful, and what drives two-way value for nonprofits and skilled-volunteers, Common Impact and Capital One generated case studies to show skilled-volunteering in action. These case studies are intended to be illustrative, and while drawn from actual experience, the organizations mentioned are fictitious.

Case Study One: The Community House of Northern Virginia

The Mission: The Community House of Northern Virginia (CHNV) provides a range of human services to individuals and families to help Northern Virginians gain greater self-sufficiency.

The Need: CHNV has found that while individuals from Northern Virginia often wanted to volunteer at the organization, they lacked the personnel or tools to track volunteer interest or satisfaction. As a result, volunteer inquiries were handled on an ad hoc basis, resulting in volunteer attrition and lower satisfaction.

The Solution: CHNV worked with a team of operations and technology skilled-volunteers to identify best-practices in volunteer management. Based on the analysis, the team recommended building a volunteer database that would track CHNV's volunteer engagements; the team also generated surveys and reports CHNV could use to learn about volunteers' interests and evaluate their success in meeting those goals.

Evidence of CHNV's Readiness:

- *Strategic engagement of skilled-volunteers:* CHNV's management team identified repeat volunteering as a success metric because they found that as long-term volunteers learned about the organization, their knowledge translated to an even higher quality of service to their clients.
- *Effective relationship building:* CHNV could share concrete examples of how they built long-term relationships with partner agencies and ensured both CHNV and their partner organizations derived value from the relationship.
- *Completed Project Ground-Work:* They had spoken with recent volunteers and learned about what motivated them to volunteer and had gathered the names of similar organizations so their skilled-volunteers could contact them to learn about best-practices.
- *Buy-In and Decision-Making:* A member of the Board of Directors attended the first meeting and shared why improving volunteer retention was key to the organization's long-term sustainability.

Project Success Characteristics:

- *Linked to Organizational Planning:* Because the project flowed from a management mandate, the organization knew that completing this project was mission-critical, and would be a priority even with already full plates.
- *Defined Deliverables:* CHNV knew what they wanted to see at the end of the project – information about peer organizations' volunteer management best practices and recommendations on systems or tools to boost repeat volunteering and satisfaction.
- *Identified Project Milestones:* The organization identified the completion of best practices research and delivery of recommended approaches as the two project milestones; CHNV identified a rough timeline for when they wanted this input from their team.
- *Could Be Completed Remotely:* CHNV set up a weekly lunch time call with their volunteer team so the team could gather the input they needed from CHNV without taking time off of work.

Case Study Two: Mentors For Excellence

The Mission: Mentors for Excellence (MFE) strengthens communities by recruiting, matching, and supporting mentors to serve as literacy volunteers to children within their local Boston communities.

The Need: MFE realized the hundreds of mentors they worked with each year were the day-to-day face of their organization, but MFE did not have standard language, such as talking points, they could provide to mentors in order to leverage this network of potential ambassadors.

The Solution: MFE engaged a team of writers, product managers, and editors to generate a communications guide for their organization. The team used existing organizational messages to develop audience focused messaging for MFE parents, schools, and teachers, and then trained MFE mentors on how to communicate these new messages.

Evidence of MFE's Readiness:

- *Strong Executive Leadership:* MFE's Executive Director shared the need for MFE's literacy assistance, the organization's long-term vision, and how MFE tracked their success now to ensure they were advancing reading levels to meet their vision in the future.
- *Potential to Create Deep Social Impact:* The organization could cite examples of mentor-mentee relationships that not only improved reading skills, but also inspired a love of reading and learning.
- *Post-Project Support Plan:* MFE knew that training their mentors was an essential part of making their new messaging stick, but also knew this was something their staff didn't have the time to provide. As a result, their skilled-volunteers included a "train-the-trainer" exercise at the conclusion of the project to lead MFE mentors through an exercise they could use to train mentors at their sites.
- *Defined Project Leadership:* The organization knew their Development Director had the most experience marketing MFE, and identified her as the ideal project lead; before the project began, her manager was brought into the conversations to ensure she had the time to manage the project effectively.

Project Success Characteristics:

- *Easy to Give What They Know:* MFE asked their skilled-volunteers about their preferences for meeting times and used this as a basis for setting on-going call times. MFE also identified a project lead who was the main point of contact for their skilled-volunteers.
- *Two-Way Sign-Off:* At the project kick-off meeting, the MFE project lead and skilled-volunteers reviewed the scope document together and agreed on the number of messages and audiences that would be included in the communications guide.
- *Easy For-Profit → Nonprofit Skill Transfer:* Writing, branding and editing were all highly portable skills that allowed MFE's volunteer team to build on their skills and start work immediately.
- *Reasonable Time Commitment:* In one to two hours each week, MFE's volunteers produced example messages which MFE reviewed and then shared feedback on during their weekly call; the skilled-volunteer team delivered not only the communications guide, but also mentor training in under six months.

Case Study Three: Educational Funders, Inc.

The Mission: Educational Funders, Inc. (EFI) improves urban public schools by identifying the most effective school programs, partnering with donors to invest in the most effective initiatives, and supporting educators with hands-on expertise.

The Need: EFI knew their website kept current and potential donors apprised of their work, but their site was difficult and time-consuming to update, so it was often out-of-date. Without a compelling website, the organization struggled to communicate the impact of their work and build their major donor pipeline.

The Solution: EFI engaged a team of technologists to build a new site layout, refresh the look and feel, and make the information more intuitive to find. The team built the new site in an easy-to-use technology and trained the organization on how to make changes, so they could make updates in-house.

Evidence of EFI's Readiness:

- *Organizational Stability:* The organization shared examples of multi-year donors and a strong plan for financial sustainability. In addition, EFI had three core staff members that had been with the organization for over five years, ensuring institutional knowledge could be shared with their team.
- *Potential to Create Deep Social Impact:* EFI prided themselves on their ability to measure impact, and provided data that showed the effect their work had on urban public schools.
- *Buy-In and Decision-Making:* A mix of staff and board attended the initial meeting, showing the consensus and commitment of program staff, management and board to the website project. In addition, the group had already defined who would provide input along the way, versus those who would review progress and provide feedback at key milestones.
- *Post-Project Support Plan:* One of EFI's main goals with the project was to reduce the cost of website maintenance by bringing the support and updating of the site in-house. In preparation, the organization had already determined the staff member who would update the site moving forward.

Project Success Characteristics:

- *Clearly Defined Scope:* EFI knew they didn't want a complicated or flashy site, so using their existing site as a guide they documented ten sections they wanted their new site to include. They also provided information about who currently used their site, and who they were hoping would begin to use it after the redesign.
- *Minimal Risk:* EFI communicated the importance of always having their website accessible, even as the new site was built. As a result, their team made a copy of their existing site and redesigned this version. When the new site was complete, the team launched it in the morning, before schools opened. EFI also made sure they had all the information on their existing site saved elsewhere, in case some of their content didn't load properly when their new site was launched.
- *Not Time Sensitive:* EFI hoped to be able to launch their new site before the start of the new school year, and the organization shared this with their team, but also acknowledged that this was a goal. The team developed a project plan to try to meet the goal and also made sure if the goal wasn't met it wouldn't interrupt EFI's delivery of services.
- *Can Be Phased:* EFI and their skilled-volunteer team met to kick-off the project and defined four key milestones: kick-off, alpha (where the team would provide several examples of how the site could look so EFI could provide feedback), beta (where the team would present a nearly complete site design for final tweaks from EFI) and launch (when the new site would go live).

Resources Available to Get Ready for Skilled-Volunteering

To make the information in Skilled-Volunteering 101 practical and useable, Common Impact and Capital One reviewed information available and identified the best tools to help your organization:

- Assess your readiness;
- Prepare high-quality, win-win skills-based volunteering projects; and
- Learn from real-life examples of quality skilled-volunteering in action.

Assessing Readiness

- This questionnaire, created by the Corporation for National and Community Service will help your organization understand its own readiness to engage in skilled-volunteering projects. It contains questions that will help your organization assess its own preparedness and can be used to start engaging skilled-volunteers for the first time or to refine an existing program. **http://learning.nationalserviceresources.org/course/view.php?id=62**
- Because engaging, and managing, skilled-volunteers can be quite different than traditional volunteering, the Executive Service Corps of Washington created this self-assessment to help your organization think about readiness; this self-assessment will lead your organization through a series of questions to help determine if you are ready to leverage the time and talent of skilled-volunteers. **www.escwa.org/files/Readiness%20Assessment%20for%20Skills%20Based%20Volunteers.pdf**
- The Dwight Stuart Youth Fund developed this set of questions that your nonprofit can use when thinking about readiness; it will help your organization consider questions about resources (financial and human) how the project will be managed, and whether there is sufficient buy-in to merit exploring skilled-volunteering resources. **http://www.dsyf.org/pdf/DSYF_quick_assessment.pdf**

Preparing Win-Win Skills-Based Volunteering Projects

- This guide was developed to help nonprofits and companies form mutually beneficial relationships through skilled-volunteering. While the focus of this guide is on corporate skilled-volunteering, the nonprofit sections can help any organization think strategically, and concretely, about how to effectively leverage skilled-volunteers; it contains a series of checklists in areas such as "Getting Started," "Implementation" and "Evaluation". **www.karingal.org.au/imagebank/docs/baclinks/Resources/Employee%20Volunteering%20Guide.pdf**
- The Marguerite Casey Foundation developed this tool to help nonprofits identify their strengths and challenges related to internal capacity. This tool will allow your organization to understand current operational capacity; places where operational capacity is limited may be a great place to leverage skilled-volunteers for strategic and high-impact projects. **http://www.caseygrants.org/pages/resources/resources_downloadassessment.asp**
- After using the capacity self-assessment tool from The Marguerite Casey Foundation, your organization can use this worksheet to define project scope, including steps like milestone definition, stakeholder identification, and potential risk areas. Try filling out this document, circulating among stakeholders, getting internal sign-off and then sharing with skilled-volunteers; this will ensure everyone is starting from the same page. **http://www.jerichoroadproject.org/core%20docs/JR_Scope.doc**

Real-Life Skilled-Volunteering In Action

- See how a team of State Street Corporation's human resources experts enabled the Action Center for Educational Services and Scholarships (ACCESS) to focus staff development resources in areas that would have the greatest impact on their mission of helping students afford a college education. **http://www.commonimpact.org/pdf/ACCESS-Performance-Evaluation-Process.pdf**
- MS&L Atlanta engaged core skills of public relations, and marketing communications and put it to work for nonprofits such as the Special Olympics Georgia, Consumer Credit Counseling, and Samaritan House. MS&L Atlanta helped these organizations generate greater awareness, something each organization needed, but lacked the staff capacity to tackle. **http://www.pointsoflight.org/sites/default/files/SBVInsert_MS&L_FV.pdf**
- Learn about how Fannie Mae leveraged its employees to identify troubled home-owners, generate prevention plans, and organize an event to reach home owners in danger of losing their homes. This case study shows the importance of aligning skilled-volunteering with the skillsets of available volunteers and the profound impact skilled-volunteers can have on their communities. **http://www.pointsoflight.org/sites/default/files/SBVInsert_FannieMae_FV.pdf**

Checklist: Is My Organization Ready for Skills-Based Volunteers?

While every organization is different, Common Impact and Capital One developed this check-list to help nonprofits clarify if they are ready to engage skilled-volunteers. Ask a variety of staff to fill out this checklist and consider including a mix of staff roles, tenure and levels. If there is consensus that your organization can answer "yes" to most of the questions below, your organization may be ready to engage!

Organizational Readiness

Have we looked at our service model recently to ensure it is meeting the needs of our clients?
☐ Yes ☐ No

Do we know what makes our programs successful?
☐ Yes ☐ No

Organizationally, are we clear about how each program relates to our mission and vision?
☐ Yes ☐ No

Are all staff and board on the same page about the kind of social change we are trying to achieve?
☐ Yes ☐ No

Do we know what our organizational goals are for the next few years?
☐ Yes ☐ No

If we meet these goals, are we clear on how this will improve our ability to meet our mission?
☐ Yes ☐ No

When we've engaged volunteers in the past, did we monitor their satisfaction to make sure they had a good experience?
☐ Yes ☐ No

If we got feedback on ways to improve our volunteer engagement, did we act on it?
☐ Yes ☐ No

Do we know how to solicit information about what our skilled-volunteers are trying to get out of their involvement with our organization?
☐ Yes ☐ No

Once we get this information, are we confident we can create an experience that will deliver?
☐ Yes ☐ No

Do we have the bandwidth to manage external resources?
☐ Yes ☐ No

Do we know what organizational challenge we want skilled-volunteers to address?
☐ Yes ☐ No

Is it clear how addressing this challenge will help our organization more effectively deliver on our mission?
☐ Yes ☐ No

Project Readiness

Have we addressed any road-blocks that have affected our ability to solve this challenge in the past?
☐ Yes ☐ No

Can we define project success?
☐ Yes ☐ No

Do we know what kinds of deliverables we are looking for from our skilled-volunteers?
☐ Yes ☐ No

Do we know what information we need to provide volunteers in order to help them achieve success?
☐ Yes ☐ No

Can we access that information before skilled-volunteers are engaged?
☐ Yes ☐ No

Have we vetted this idea with stakeholders to be sure we are in agreement about the value of the project?
☐ Yes ☐ No

Do we know how much input each person wants to, and should give, into the project?
☐ Yes ☐ No

Do we know how we will support the project after it's delivered?
☐ Yes ☐ No

Do we know how we will use the project results?
☐ Yes ☐ No

Are all the individuals who need to be involved with this project able to do so right now?
☐ Yes ☐ No

Do we know who will manage this project, and does this person have the organizational knowledge and capacity to manage it?
☐ Yes ☐ No

(cut here)

About Capital One and Common Impact

Capital One Financial Corporation, headquartered in McLean, Virginia, is a Fortune 500 company with approximately 1,000 branch locations primarily in New York, New Jersey, Texas, Louisiana, Maryland, Virginia, and the District of Columbia. Its subsidiaries, Capital One, N.A. and Capital One Bank (USA), N.A., offer a broad spectrum of financial products and services to consumers, small businesses and commercial clients. We apply the same principles of innovation, collaboration, and empowerment in our commitment to our communities across the country that we do in our business. As corporate sponsor of this research, Capital One proudly supports Common Impact as they provide tools to help nonprofits prepare for skills-based volunteering projects. Since 2008, Capital One associates have delivered 250 projects valued at more than $4 million worth of skills-based professional services to strengthen and build capacity for both national and local nonprofit partners. We recognize that helping to build strong and healthy communities – good places to work, good places to do business and good places to raise families – benefits us all and we are proud to support this and other community initiatives.

Common Impact's mission is to strengthen high-potential nonprofit organizations by helping companies deploy their human capital more strategically in the social sector. Through Common Impact, employee teams from leading companies have provided IT, Marketing, HR, Finance and Operations solutions to nearly 300 high-potential organizations in Boston, New York, Richmond, VA and Raleigh, NC. Common Impact's approach harnesses the power of skilled-volunteers to execute capacity building projects with community-based nonprofits and creates successful partnerships that are of value to all participants. Common Impact has unlocked an estimated $7 million in net new resources for the social sector and a 7:1 social return on investment.

COMMON IMPACT
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