



### ***Skills-Based Volunteer Project Readiness Checklist (High-Level)***

If you have figured out that your organization is ready to take on a skills-based volunteer project, now is the time to make sure you're getting your project ready to go!

Below you'll find a checklist of all of the critical components to *project readiness*. Once you've crossed all these items off your list, you'll be set up for a successful, impactful skills-based volunteer (SBV) project!

#### **Define Your Project Goals**

The first critical piece of getting "project ready" is to define your organizational and tactical goals for the project. Your goals should (1) articulate the connection between the project and the organization's overall strategic goals and (2) provide a high level definition of what success looks like at the end of the project.

- € Develop a clear articulation of the project's role in an overall organizational or program strategy
- € Decide upon the top 1-3 goals for a particular project and make sure they're documented
- € Reach agreement across your organization on project success, i.e. if the project was completed successfully, what would the volunteer team have achieved / what would your organization be able to do that it isn't able to do now.

#### **Define Your Project Scope**

The next critical step is to tightly scope your SBV project. One of the biggest mistakes organizations and volunteers make in setting up these SBV projects is to too loosely or broadly define the work that the volunteers will do on the project. Before your project begins, make sure you, your internal stakeholders and your volunteer team are all on the same page around project goals, project components, what's *not* included in the project and the overall timeline.

- € Create a defined scope of work
  - ✓ Document of major project components and milestones
  - ✓ Document of the estimated hours associated with each component / milestone [Note: Nonprofits can seek guidance on estimated hours from functional experts, their skills-based volunteer team and/or skills-based volunteer consultants]
- € Create a "Version Two" list. Document potential or discussed project components that are **not** within the agreed upon scope of work or time commitment
- € Define project processes and protocol
  - ✓ Document of the stages and associated steps required to successfully complete project
  - ✓ Document any communication protocol or plan for the stakeholders included in the project (i.e. how the volunteers should communicate / receive information from project stakeholders other than your assigned project lead)

- € Sign-off on the scope of work, project process and overall timeline by your organization's senior management and from the volunteer team

### **Define Project Leadership**

The next step you'll take is to define who is leading your project from within your organization – a single person that will be accountable for the project and should be the volunteer's main point of contact. There will likely be a person at your organization who seems a logical project lead -- makes sure that person has (1) the time needed to lead the project (2) ability to make quick decisions related to the project and (3) the organizational background needed to help the volunteers get the information they need to complete their work.

- € Assign a project lead from your organization
  - ✓ Assigned project lead should have the determined capacity needed to manage project [timing varies project to project but is typically a minimum of 2 hours / week]
  - ✓ Assigned project lead should have ability to make small to medium project decisions on their own and be able to quickly facilitate internal decision making on larger project questions
  - ✓ Assigned project lead should have deep knowledge of the challenges faced in the area the skills-based volunteer team is addressing [i.e. if your SBV team is working on an IT project, your lead need not have IT background or expertise, but should have deep perspective on what the organization's IT challenges are.]

### **Create a Post-Project Support Plan**

The final critical step to take before a project begins is to develop a post-project plan to ensure that the work on the project is incorporated into your organization in an impactful way and can be maintained once the volunteers have transitioned off. The key to any successful SBV project is making sure it has a life outside the bounds of the project work itself and the expertise provided within the scope of the project can be leveraged by your organization over the long term.

- € Document a roll-out or training plan for the project, including an understanding of the skills-based volunteer team's role (if any) and internal roles. You should be sure to train various staff members at your organization to reduce reliance on one staff person or the project lead.
- € Clearly articulate the staff resources that will be dedicated to supporting the integration of the project work into the organization's day-to-day operations
- € Create a communication plan that outlines the stakeholders and audiences that will need to be informed and engaged in carrying the project work forward
- € Ability to secure any identified financial resources needed to sustain project work over the long-term