



Skills-Based Volunteer Project Readiness Checklist (Project Specific)

If you've determined that your organization is ready to take on a skills-based volunteer (SBV) project and you're getting your project ready to go with our project readiness checklist <http://www.commonimpact.org/pdf/project-readiness-high-level.pdf>, you're probably starting to figure out that not all SBV projects are created equally!

Below is a suggested checklist to help get organizations ready for *specific types* of SBV projects. Since every project is tailored to individual organization's needs and the skills of the volunteer team, you'll likely have to tack on a couple of additional items to the lists below to be fully ready. Starting each project with an open, detailed conversation with your volunteer team about the information they need to get started and learn from you will allow you to build out these checklists in a way that meets the unique needs of your project.

Finance

Skilled volunteers with financial skills can help stabilize and streamline your organizational financial infrastructure and allow it to make informed decisions about organizational development and operations. Typical finance SBV projects include financial model development, financial statement development, cost-benefit analyses, and external market and environmental scans.

- € Senior leader with financial management responsibilities assigned as project lead [given the financial context / decisions will need to be made during the course of the project]
- € Currently utilized financial statements for current year and for past two years that can be shared with team
- € Available budget for financial management systems and streamlining
- € Documentation / Overview of any external Finance support

Human Resources

Skilled volunteers with experience in Human Resources can help develop the HR infrastructure of your organization and address the unique cultural and structural issues that arise in a nonprofit environment. Typical SBV projects in Human Resources include general HR health assessments and charter development, recruiting and hiring process development, policy development, benefits and compensation research and performance review development.

- € Documentation of all current HR models, policies and processes used by the organization
- € Identification of sensitive / non-sensitive HR materials
- € Documentation on organizational structure and any shifts that have occurred
- € Documentation / Overview of any external HR support (i.e. payroll consultants, etc.)

Marketing

Skilled volunteers with marketing expertise can dramatically increase an organization's internal branding infrastructure and its external marketing presence and reach. Typical SBV marketing projects include messaging platform development, creating communication and visual style guides, logo development, building print and electronic marketing materials, developing a PR and communications strategy, and conducting market research.

Branding Projects (i.e. internal guides and message development)

- € Organizational history, mission and vision statements
- € Documentation of any branding work done in the past and any large brand shifts
- € Any available organizational branding guidelines (visual style guide and/or communications guide, including any mandated branding guidelines from national office if your organization is a chapter or affiliate of a national organization)
- € Electronic or print format of primary marketing materials and collateral
- € Descriptions of key target audiences (i.e. donors, clients) and the *organizational* goals associated with each of those audiences

Marketing Projects (i.e. communication strategies, material development, market research)

- € Everything on the "Branding Projects" checklist above
- € Documentation of messaging platform (incl. key organizational messages, taglines and elevator speeches)
- € Description of the *marketing* goals associated with each of the organization's key target audiences
- € Available budget for additional marketing outreach, materials and/or resources

Operations

Skilled volunteers with operations background can help organizations increase the efficiency of their programs, allowing them achieve sustainable growth and deepen their impact. Typical Operations SBV projects include business process analysis (using LEAN or Six Sigma models), information mapping and program optimization projects.

- € Documentation / Overview of key operational processes (internal and / or external depending on what project is examining)
- € Identification of key stakeholders / perspectives for the operational processes being examined. Ensure that there is a mix of unique perspectives on the same process.

Strategic or Business Planning

Skills based volunteers can provide strategic perspective and expertise to your organization to help underline key strategies, prioritize organizational goals and develop a feasible, tactical plan to achieve those goals. SBV projects that involve strategic or business planning typically require a higher level of

engagement from your staff, a higher time commitment from your volunteer team, and a more open communication structure between all project participants.

- € Executive Director or senior leader assigned as project lead [given the strategic context / decisions will need to be made during the course of the project]
- € Documentation of any current or former strategic or business plans developed by the organization (including suggested or mandated strategic plan from national office if your organization is a chapter / affiliate of a national organization)
- € Project acknowledgement (and approval if necessary) from Board of Directors
- € Identification of key stakeholders to include in project process, articulation of input needed and time commitment from those stakeholders
- € Any relevant organizational history, background, highlighting strategic changes in direction (what worked and what didn't)

Technology

Skilled volunteers with Information Technology (IT) skills can solidify an organization's IT infrastructure, streamline organizational platforms and decrease organizational issues related to IT. Typical technology SBV projects include overall IT assessments, IT infrastructure development, networking configuration, database development and website creation.

- € Documentation of IT infrastructure, including hardware, software, primary applications / platforms, networking configuration
- € Documentation of internal and external IT support and maintenance
- € Available budget for IT improvements / streamlining