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Nonprofit Skills-Based Volunteering Toolkit
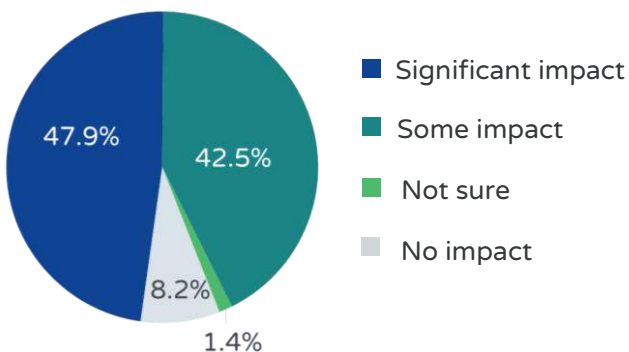
Tools for good pro bono

Welcome to Common Impact's Skills-Based Volunteering (SBV) Toolkit! Since 2000, Common Impact has supported nonprofits in effectively utilizing SBV to build internal capacity to better serve the community. Our decades of experience have proven that SBV holds great promise for both companies and nonprofits, and represents a sustainable resource for addressing social challenges, that complements traditional philanthropy and volunteerism.[1]

SBV is rapidly growing in popularity, with now **more than 50% of companies** engaging their employees in skilled service.[2] Although we have seen tremendous growth and excitement around SBV, it is still a relatively new concept for nonprofits and companies alike. As skills-based volunteers become more readily available to nonprofits, we at Common Impact want to ensure that we're sharing the key elements of **sustained impact** that we've gathered over our years as SBV practitioners.
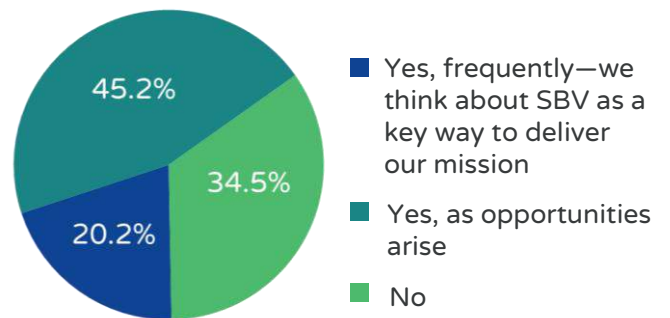
We've developed this toolkit to demystify SBV and equip nonprofits with the resources and best practices to engage in successful and strategic pro bono. Whether you are new to SBV or a seasoned veteran, this toolkit will provide you with the knowledge, tips, and tricks to ensure your organization is maximizing the value of SBV.

Need some inspiration before getting started? Check out the long-term impact that SBV has had on some of our alumni nonprofit partners!

To what extent has this project impacted your organization's ability to meet your mission?

- 47.9% Significant impact
- 42.5% Some impact
- Not sure
- 8.2% No impact
- 1.4%

Have you continued to use SBV to build the capacity of your organization after your project?

- 20.2% Yes, frequently—we think about SBV as a key way to deliver our mission
- 45.2% Yes, as opportunities arise
- 34.5% No

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[1] Read more about the benefits and challenges of skills-based volunteerism in [*The Promise of Skills-Based Volunteering*] https://ssir.org/articles/entry/the_promise_of_skills_based_volunteering, by Danielle Holly and Christine Letts, Stanford Social Innovation Review, Fall 2017
[2] CECP *Giving in Numbers*, 2016

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Readiness for SBV → Identifying & Scoping your Project → Recruiting Skilled Volunteers → Managing your Project → Evaluating your Project

Determining Organizational Readiness for Skills-Based Volunteering

Before embarking on a pro bono project, it is important to understand if your organization is at the right point in its lifecycle where pro bono resources will be the most beneficial. Take our readiness assessment to understand your strength and growth areas in becoming "ready" for skills-based volunteering. And please do not be discouraged by your areas for growth! The survey will provide you with resources to help you increase readiness in each area so that you can effectively utilize pro bono. In this section you'll:

✓ Refresh on the who, what, where, and why's of skills-based volunteering
✓ Understand whether your organization is ready to engage volunteers, and if not, what resources are available to help get you there
✓ Learn best practices to help your organization navigate the corporate, nonprofit power dynamic so you can effectively manage volunteer requests to create the greatest impact

Identifying and Scoping your Project

Once you've identified that you are organizationally ready for pro bono, it is time to scope out a project that will fit within your desired timeframe for the engagement. In this section you'll learn how to:

✓ Identify organizational challenges
✓ Scope these challenges into time-bound projects
✓ Assess skills-based project readiness
✓ Determine the costs and benefits of utilizing pro bono

Recruiting Skills-Based Volunteers

As a part of the sourcing process, Common Impact provided you with a project scope and description – a great start! Identifying and recruiting skills-based volunteer(s) for this project is your next step. In this section you'll learn how to:

✓ Tap the skills-based volunteers that are hidden in your current network

- ✓ Gain access to the platforms to meet new and ready skilled volunteers
- ✓ Sell companies on your project

Managing your Project

Once you have recruited the skills-based volunteer(s) that are aligned with your project needs, it is time to get started on your project. In this section you'll learn how to:

- ✓ Structure and manage your skills-based volunteer project
- ✓ Choose the correct person on your staff to support the volunteer(s)

Evaluating your Project

Measuring project impact and evaluating the volunteer(s)' experience enables your organization to not only improve processes for future engagements, but also provides you with the proof points to demonstrate the value of skills-based volunteering to key stakeholders. In this section you'll learn how to:

- ✓ Effectively evaluate your skills-based project
- ✓ Develop the tools and metrics to support your skills-based evaluation efforts

Org Readiness for Skills-Based Volunteering

Skills-Based Volunteering 101
Refresh on the who, what, where, and why's of skills-based volunteering.

Skills-Based Volunteering Organizational Readiness Wizard
An interactive assessment to understand whether your organization is ready to engage volunteers, and if not, what resources are available to help get you there.

Navigating Corporate Nonprofit Power Dynamics
A list of best practices to help you to advocate for your needs and create mutually beneficial cross-sector partnerships.

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The Nonprofit Environment and Capacity Building Need

As a nonprofit organization, you are likely well aware of the capacity building need unique to the nonprofit sector. This resource will provide you with a snapshot of the pressures that cause the capacity building gap in nonprofit organizations and an overview of how skills-based volunteering can be a resource to help nonprofits fill this gap.

Overview of Skills-Based Volunteerism
What is Skills-Based Volunteerism?

Skills-based volunteerism (SBV), also known as pro bono, allows individuals to put their expertise to work to help address complex social issues by helping nonprofits build their capacity and extend their reach in the community. Skills-based volunteering can take many forms. From providing general skills like tutoring, to serving on a board of directors, all the way to donating specialized expertise in key functional areas. Skills-based volunteering is the fastest growing form of corporate giving, with **nearly 50%** of companies reporting having an SBV program in place.[1]

Pressure to Keep Overhead Costs Low

As many of you know, unlike private sector funding which generally comes from client revenue, nonprofit funding usually comes from third parties such as government, donors, and foundations. These funders often put restrictions on how these funds can be used. Because of this, nonprofits are often pressured to keep their overhead costs low because many donors restrict donations to be spent on programming rather than the less visible overhead costs such as building infrastructure or staffing.

Nonprofits Underspend Significantly on Organizational Development

While corporations spend upwards of **35%** of total expenses on operating costs, nonprofits spend significantly less. On average, nonprofits spend about **2%** of their budget on overhead to support key operating functions.

35%	2%
Average FOR-PROFIT Overhead Cost	Average NONPROFIT Overhead Cost

Few Nonprofits have Functional Expertise on Staff

Something for corporate volunteers to consider while working on a flash consulting project is that nonprofit staff often wear many "hats" and specialize in multiple functional areas due to resource constraints. At times, this means that a nonprofit staff member may not have formal training in functional areas that are critical to infrastructure development. Instead, most nonprofits rely on untrained employees (41%), consultants (25%), or volunteers and board members (19%) to staff these functions.[2]

> The external pressure to keep overhead costs low combined with staffing constraints that limit infrastructure development (often related) **create a critical capacity building need for nonprofit organizations that can be filled by skills-based volunteers.**

By leveraging professional skills, such as marketing, human resources, or technology, in addition to their time, a volunteer can exponentially increase the impact made on the community through skills-based volunteering. **In fact, the value of a skilled volunteer hour is over 7 times the value of a traditional volunteer hour:**

Average Value of a Traditional Volunteer Hour: $27	Average Value of a Skilled Volunteer Hour: $150

1.. CECP, in association with The Conference Board. *Giving in Numbers: 2015 Edition.*
2. Common Impact (2007). *Assessing the Problem: Underinvestment in Organizational Infrastructure.*
3. Independent Sector (2015). *Value of Volunteer Time.* Retrieved from: https://www.independentsector.org/volunteer_time

Organizational Readiness Wizard

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Skills-based volunteers can make a significant impact on the ability of your nonprofit to realize its mission. Still, as you know, volunteers aren't "free" and in order to understand whether engaging skilled volunteers is worthwhile, it's important to know if your organization is ready to make the most of their contribution. Common Impact uses a number of organizational readiness factors that will be helpful to consider as you determine if your nonprofit is at the right point in its lifecycle for Pro Bono.

Strong Executive Leadership
- Conveys a strong social vision, energizes and listens to stakeholders, leverages opportunities to innovate and meet changing client needs, and is open to constructive critical feedback and new ideas.

Create Deep Social Impact
- Takes a compelling vision, breaks it into programs that work, and hones the model over time to achieve the mission

Effective Relationship Building
- Leverages external resources, engages people with different points of view, solicits feedback, and sustains long-standing partnerships

Organizational Stability
- Solid financial and operational footing, with no significant management, staff or board turnover in the last few years

Engagement of Volunteers
- Connects the work of volunteers to the organization's ability to strengthen its foundation for greater sustainability

Commitment to Capacity Building
- Senior leadership has shown a willingness to devote time and resources to capacity building functions.

You can also take our interactive readiness assessment to understand your strength and growth areas. And please do not be discouraged by your areas for growth! Common Impact has plenty of resources in each area to help you increase readiness so that you can maximize the impact of pro bono for your organization.

Navigating Corporate Nonprofit Power Dynamics

Power dynamics exist in every relationship, but are particularly pronounced in collaborations that include an exchange from one party to another—of resources, services, or ideas. Such dynamics often color corporate-nonprofit relationships, driving nonprofits to shapeshift in order to match the priorities of their funders or corporate partners. While it's important to acknowledge these dynamics, they don't have to dictate the norms of your SBV experience! Here are a few tips to help you to advocate for your needs and create mutually beneficial cross-sector partnerships.

Don't be afraid to say no

- Before you embark on an engagement, make sure the SBV resource aligns with your needs and goals. Don't be afraid to say no if a company comes to you with a project that is not the right fit.

- If this isn't the right time for SBV, that's okay! Provide your partners with clear reasons why this isn't the right project at this time. Proactively ask (and tell!) them how they can best support your organization.

Create a culture of trust and open communication

- While your volunteers may be subject matter experts, you're the expert on your organization. Be upfront about your operating environment, trust in the expertise of your volunteers, and approach the partnership with an open mind!

Direct the services to where you need them the most

- SBV is designed to address the core areas of a nonprofit's business that are traditionally under-resourced and under-funded. Be honest and directive about where volunteers can best plug in.

- Pro tip: don't forget to do your research to understand what unique talents, knowledge and experiences your partner can offer!

Feedback, feedback, feedback!

- Set the tone at the beginning of your project for how valuable feedback is. If you expect to receive it and intentionally create space for it as part of the process, then it will feel less personal and more reciprocal.

- It can help to think of yourself as a client receiving a service. Feedback is not only welcome, but necessary to move the project forward!

Encourage your partners to be committed beyond pro bono

- Consider pro bono as a potential gateway to a longer-term relationship. Actively brainstorm with your volunteers how to grow and develop the partnership over time.

Identifying and Scoping your Project

Common Impact Project Portfolio
A portfolio of Common Impact's most common long-term (6 weeks-6 months) projects to support you in thinking through how your capacity building needs could translate to a project.

Project Scoping Template
A worksheet to identify your organizational challenges and narrow challenges down into potential skills-based projects.

Skills-Based Volunteering Project Readiness Wizard
An interactive self-assessment to help you understand whether your organization's proposed project is ready to take on skilled volunteers and if not, what you'll need to do to get there.
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Pro Bono Calculator: Quantify the Value of your Pro Bono Project
A tool to help nonprofit organizations calculate the true value of pro bono for their organization by assessing organizational value and investment.

Operations

Information Mapping Project

Diagram and document methods for tracking and managing information across an or-
ganization, using flow charts, documentation from the nonprofit, and job descriptions

Program Delivery Optimization Project

Create a process map and analyze ways to generate greater efficiency across multiple
programs and services

Client and Crisis Relationship Training

Train new client managers or call center employees on how to build trust in client relationships, deescalate crisis-
level conversations, and produce high quality client care with minimal time

Strategy

Strategic Plan Development

Develop or update a strategic plan for the organization, including conducting an
environmental scan/market analysis, facilitation of organizational goals and priorities and
documentation of operational plan to achieve these goals

Partial Business Plan Development

Develop one portion of a business plan for a specific program or initiative. Possibilities include: 1) conducting   fi-
nancial analysis and projections; 2) developing the operational, marketing, or HR considerations for the plan, or 3)
creating benchmarks for successful implementation of the program or initiative

Full Business Plan Development

Develop a full business plan for a specific program or initiative, including conducting financial analysis and
projections, identifying operational, marketing, and HR considerations/benchmarks for successful implementation

Human Resources

Benefits and Compensation Review Project

Develop a compensation philosophy or analyze research (often requires purchase by non-
profit) to determine average salaries and benefits offered by similar nonprofits and present
findings to nonprofit executives that details existing average salaries, how they compare,
and changes they should consider making

Performance Review Development Project

Revamp the annual performance review process for employees of the nonprofit organization, including defining an
annual goal-setting, performance review process, and hiring a new employee

Recruiting and Hiring Process Project

Work with key nonprofit staff to craft a job description and write interview questions the organization can use when
hiring a new employee

Personnel Policy Development Project

Create an employee handbook for the organization with detailed documentation about personnel policies.
Please note: the members of the team must have significant experience in employment law

Succession Plan

Work with nonprofit leadership and Board of Directors to develop a strategic roadmap for a nonprofit leadership transition, which will ensure leadership continuity and retain and develop knowledge capital and relationships for the future

Marketing

Collateral Assessment

Analyze existing collateral for consistency of look, feel, and messaging consistency and provide recommendations to create greater alignment across the marketing portfolio

Brand Attributes Guide Project

Define and document a nonprofit's brand attributes such as target audiences, audience characteristics and attributes, and communications tone

Collateral Development Project

Revamp marketing collateral to create a visually appealing and consistent message. Examples of such projects include: brochures, annual reports, e-newsletters, or a website

Digital Communications Plan

Craft an integrated digital communications plan (may include website, social media, email or other online channels and platforms) and key recommendations for an organization, focusing on bringing together consistent content approach, design, and user experience

Market Research Project

Conduct a peer (competitive) analysis, focus groups and/or interviews to help a nonprofit understand and define their positioning in the marketplace

Sales

Sales Forecasting

Create structure around a nonprofit's charitable contributions or earned income revenue stream by categorizing the different stages of the sales process, assigning metrics and forecasting tools to each stage, and coaching internal stakeholders on how to translate ambiguous conversations into tangible forecasting

Defining an Organizational "Pitch" (3-4 months)

Craft a foundational messaging platform (positioning statement, tagline, and key messages) and then tweak that messaging platform to target the different, unique audiences of the nonprofit organization. Once that messaging is defined, outline the metrics that support each set of messages and train key internal stakeholders to use the new messaging

Product Creation (6 weeks to 4 months)

Support a nonprofit in developing product as part of an earned income revenue strategy. Project could include conceptualizing product, identifying key audiences, crafting packaging (i.e. messaging, pricing, etc.) and a bring- to-market strategy

Technology

Database Assessment

Assess the use and architecture of a database system and provide recommendations for changes that would streamline operations and the end user experience

Website Assessment

Analyze an organization's website and document recommendations for ways in which the visual design, architecture and layout would better achieve the organization's goals

Vendor Selection

Develop requirements for a new technology vendor (e.g. CRM, website CMS, Cloud-based intranet, etc.), guide the organization through the selection process

Network Assessment

Assess an organizations current network infrastructure and develop recommendations to improve security and/or networking capability

Database Development Project

Develop a database that manages program participants, improves fundraising efficiency, or generates statistics for funders

Website Development Project

Add new functionality to an existing website, or create a brand new site, that helps a nonprofit engages its key constituents more effectively

Networking & Security Implementation Project

Develop a network that protects files against intruders, connects multiple offices to the same central file system, or builds networking infrastructure that facilitates office expansion

IT Infrastructure Assessment & Strategic Plan

Assess all elements of IT Infrastructure, develop recommendations for infrastructure improvements to support operations and craft a 3-5 year strategic IT investment and implementation plan

Data & Analytics

Data Assessment

Collect and analyze a nonprofit's data to help drive decision making on key strategy and initiatives, increase engagement among constituents, report on program impact and generate insights about the behavioral patterns of their base.

Data Visualization | Infographic

Transform a nonprofit's current data into a dashboard-level visualization for organizational leadership, funders and other constituents to clearly understand and engage with its progress and metrics of success.

Predictive Modeling

Collect, collate and centralize data for a specific program of initiative such as fundraising. Create and implement a utilization plan that will help a nonprofit understand who they should be targeting, resulting in increased donations.

Data Tool Selection and Implementation

Understand what tools are being used to gather qualitative data to help a nonprofit evaluate the success of its programming. Research, design and launch a set of tools that will collect quantitative and qualitative data to help a nonprofit understand their impact and tell their story.

Project Scoping Template

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After reviewing Common Impact's project portfolio, use this worksheet to 1) identify organizational challenges, 2) narrow these challenges into potential skills-based projects, and 3) determine the deliverables where skilled-volunteers should focus their efforts.

Organization Name:
Organization Mission:

Strategic Organizational Goals	
1.	2.
3.	4.

Project Identification	
✓ Of your organizational goals over the next year, which goal is a priority for a skilled volunteer project?	
✓ If achieved, how will this goal help your organization better serve its clients (or meet its mission)?	
✓ What is your organization currently doing to tackle this challenge?	
✓ In an ideal world, what would you be doing to meet this goal?	
✓ What resource, product, process, capacity, etc. do you need to solve this challenge?	

Project Leadership	

Project Leads
 	
  ✓ Who will serve as the project "point person"? (This could be you!)
 	
  ✓ Who will be responsible for project implementation?
 	
  ✓ Who else will need to support this project?	

Leadership Development
 	
  ✓ What skills would you like to develop within your project point person (or within yourself if you are the project point person)?
 	
  ✓ How will you be intentional about knowledge transfer between the skilled volunteer and your staff?	

Project Readiness	

Project Goals
  ✓ What is the project's role within the overall program or organizational strategy?
  ✓ Upon completion, what will your organization be able to do that it isn't able to do now?	

Project Scope ✓ What are the major components and milestones? ✓ What should be achieved at each of these stages? How will success be documented?	
Project Leadership ✓ Who will serve as the "point person"? ✓ Who will be responsible for project implementation? ✓ Who else will need to support this project?	
Post-Project Support Plan ✓ How will you communicate next steps to organization staff? ✓ How will the projects meet organizational goals? Which staff resources will be dedicated to make sure that happens? ✓ Who else should know about the finished project (board members, media, volunteers, etc.)? ✓ What financial or other resources are needed to continue the project long-term?	

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Similar to organizational readiness, there are certain factors that make for a "ready" skills-based project. The factors in the chart below and the questions in our project readiness wizard will help you self-assess whether the project you scoped is ready to take on skilled volunteers and if not, the resources you'll need to get there.

Defined Project Goals

- Clear understanding of how the project will feed into your long-term strategic goals and you can articulate why it is important to solve the problem the project addresses.

Defined Project Scope

- The project is cohesive, addresses a core issue within your organization and takes into account the time commitment and capacity of the volunteer(s).

Project Prioritization

- The project is integral to your day-to-day work, increases staff capacity to execute, and has a sufficient level of buy-in from executive management and the board of directors.

Project Leadership

- Identification of a project lead who has the capacity to support the volunteer(s), a deep understanding of the challenge the project addresses, and the ability to make decisions autonomously.

Post-Project Support Plan

- Commitment to obtaining the resources to sustain the project work overtime.

Again, do not be discouraged by your areas for project growth! Identifying these areas for growth before embarking on your engagement will maximize both the short and long-term impact of the project on your organization.

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Once you have scoped a project and determined your readiness to engage with a team of volunteers, it is important to understand the value – that is the costs and benefits – associated with pro bono. We know first-hand that it is challenging for nonprofits to quantify social progress or to isolate the discrete impact of pro bono intervention. While that calculus looks different for every organization, we have broken down some of the value and investments related to pro bono in this worksheet that can get you started. Make sure to download our plug and play calculator for a step-by-step tool that will help you fully quantify the value without having to put on your math hat – we promise!

What is the Pro Bono project you would like to consider?

Organizational Value:

Market Value of Deliverable: _____

Either the listed value of the project (i.e. an out-of-the-box website from a traditional vendor is 20K) and the going rate for a consultant in your region times the estimated project lift (e.g. $150/hour for a web consultant x 100 hours)

Long-term Value: _____

What would be lost if this project did not exist (e.g. savings from discontinued vendors and associated fees, donor dollars earned from improved site enable expanded reach to X number of new constituents)

Long-term Value Unique to pro bono: _____

The long-term value that your organization will only recognize through pro bono, as opposed to an outside contractor or internal development (e.g. New or strengthened relationships with pro bono volunteers and/or companies (input average value of a first year of partnership with a company and/or corporate individuals).

Unquantifiable Value: _____

Business considerations that you are unable to quantify monetarily, but rather have a long-term value for your organization (e.g. improved organizational culture and morale after a project is successfully completed and the results are celebrated).

TOTAL: _____

Organizational Investment:

Cost of staff time to scope and manage pro bono engagement: _____

Monetary value of staff member(s) hour x anticipated time commitment

Opportunity Cost of Implementation: _____

The value of the initiatives that you could otherwise pursue with the resources devoted to this project (e.g. program director unable to launch a new initiative since dedicating time towards website project)

Implementation and Maintenance _____

Additional budget required to implement and maintain deliverable (e.g. website hosting fees, staff time consumed with training on updating new website)

TOTAL: _____

NET TOTAL (Total Value – Total Investment):

Questions to consider when you're communicating the value (costs and benefits) of engaging in pro bono:

- Do you need this project addressed immediately? What would be the results of a potentially protracted timeline?

- Is there a particular volunteer or corporate partner that you are looking to deepen your relationship with? How could this volunteer engagement produce that deeper relationship and heightened engagement? What would this do for your organization?

- What skillsets are you seeking to develop in your staff? Particular functional skills (database management, communications, budgeting)? Project management?

- *How will this project enable you to better achieve your mission?*

Recruiting Skills-Based Volunteers

Crafting a Volunteer Job Description
A worksheet to develop a job description that outlines the skills and experience necessary to complete your skills-based project.

Common Pro Bono Recruitment Sources
A collection of sources to identify volunteers that are the right fit for your project and organization.

Developing a Corporate Pitch
A worksheet to support you in pitching your pro bono project to a corporation.

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Crafting a Volunteer Job Description

Recruiting your skills-based volunteers should be taken as seriously as recruiting your staff! Now that you have a defined project scope, it is time to craft a job description that clearly outlines what you need and expect from your skills-based volunteer(s) so that you attract the people with the right skills and approach for your organization.

Functional Skills	What specific functional skills will the volunteer need to meet your project needs? If you don't know the name of the skill, i.e. "database architect," describe what you need them to do on the project.	
	Do you think you need an expert, someone who is proficient or someone who is willing to learn while doing? Define for each skill.	
Soft Skills	What are the soft skills the skilled volunteer will need to have to be successful (i.e. influential presentation skills, ability to navigate difficult conversations, creative problem solving, etc.)?	
Specific Background and Experience	Are there specific experiences that would be helpful for the skilled volunteer to have (i.e. exposure to a specific technology or platform, experience managing remote teams, etc.)?	

Craft the Job Description

Pull the above requirements together in a job description you could use to identify qualified skills-based volunteers

Common Pro Bono Recruitment Sources

With a job description in hand and an understanding of the type of skilled volunteer you are looking for—you are now ready to begin recruitment. We outlined several common sources of pro bono services in the chart below to help guide you through this step. In identifying the source that will serve you best, always consider those sources with which you may already have connections as it may be easier to broach the subject of receiving pro bono services. Additionally, similar to applying for a monetary grant, your requests for pro bono services should always be tailored to your audience to ensure the fit and to set your organization up for a success.

Source Category	Description
Professional Services Firms	Companies that provide consultative services as their business such design firms, law firms, management consulting firms, etc.
Corporations	Companies that have an existing employee engagement or skills-based program that can help execute pro bono projects at your organization
Individuals	Business professionals who have a set of functional skills who can do pro bono for you directly at an individual level
Intermediaries	Organizations like Common Impact that recruit and manage pro bono resources for a nonprofit (common pro bono intermediaries include Taproot Foundation, Catchafire, HandsOn Network and The Jericho Road Project).
Professional Schools	Business (MBA), IT and design schools that offer internships for their students or integrate pro bono consulting into their coursework.
Professional Associations	National organizations with local and regional members who can be tapped for lists of members in specific areas of expertise. For example, associations for human resources professionals, design associations, bar associations, etc.

Resources for Tapping into your Network

As noted, tapping into your existing network is often a fruitful way to find skills-based volunteers who are already familiar with your mission and programs. Consider using the following resources to think through creative ways to utilize those connections to tackle your pro bono projects.

Board Members, Management, and Staff of your nonprofit:

⇒ "Beyond Cash: A Guide on How Nonprofit Boards Can Tap Pro Bono and In-Kind Resources" (Taproot Foundation and BoardSource)

⇒ Bridgespan board resources

⇒ LinkedIn Nonprofit Learning Center (LinkedIn)

Your Existing Donors and Partners:

⇒ A Billion+Change

⇒ What You Need to Know to Make the Most of Corporate Pro Bono Opportunities (Common Impact)

Nonprofit Sector Job Boards:

⇒ Idealist.org

⇒ Bridgespan

⇒ The Chronicle of Philanthropy

Social Media:

⇒ LinkedIn

⇒ Facebook

⇒ Twitter

Developing a Corporate Pitch

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If you have identified that your organization has strong corporate partnerships, or are looking to develop one with a company in your local area, you can consider "pitching" your initiative or project as one that could be tackled by a team of volunteers. Keep in mind that for a company to be interested, you'll want to be able to communicate how skills-based volunteers can make an impact for your organization in a clear, compelling way. You can always refer back to our best practices on navigating the corporate nonprofit power dynamic in the beginning of the toolkit if you are unsure how to structure the conversation with your corporate partners!

What challenge are you trying to solve?	What's the big picture challenge your organization is trying to solve?	
	What are your key barriers to solving that challenge?	
What project will help you solve that challenge?	Describe your skills-based volunteer project in 1-2 sentences.	
	How does your project help you overcome the key barriers to solving the challenge articulated above?	
Think about the corporate partner you want to pitch….	Why does this particular corporate partner bring to the table that others couldn't? Think skill set, cultural competency, regional knowledge, etc.	
	Why is it the right time for this project?	
	How do you envision this supporting other elements of your current partnership with them (should one exist)?	

What's in it for them?	How does this connect to the goals that the company has for its community and employee engagement?	
	What will a company's employees learn from this project? What skills and on-the-ground knowledge will they gain?	
	How will you measure that benefit?	

Craft the pitch Pull the above points together in a 3-4 minute "pitch" that you'd use if you have the opportunity	

Managing your Project

Skills-Based Project Management 101
Guidelines for how to structure your skills-based project and best practices for successful project management.

Nonprofit Project Leader Description
An outline of the common characteristics that make for a strong nonprofit project lead.

Project Requirements Template
Step by step guidance to support you in developing a project requirements document to serve as the guidepost for your project.

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Now that you have scoped your project and secured volunteers, the next step is to consider how you will manage the project. Since these engagements are tackling core challenges your organization is facing, skills-based project management often requires a deeper level of communication and trust development with the volunteers than hands-on volunteer work.

From Common Impact's 17+ years of experience in this space, we have compiled best practices for project structure and management to support you in successfully managing your skills-based volunteer project.

Suggested Project Structure

Project Leadership

✓ Identify one member on your team to be the point person for the volunteer(s)
- Check out the Nonprofit Project Leader Description to understand who on your staff would be the best fit for this role

✓ If you are working with a volunteer team, identify a team lead, or project manager who will be your main point of contact and who will lead the team through the engagement

Communication schedule

✓ Hold 30-60 minute weekly meetings between the team and the nonprofit lead

✓ This iterative communication is crucial to ensure that all parties are on the same page and to provide your nonprofit a chance to reinforce your vision and goals for the project

Requirements Development

✓ Develop a project requirements document ([see project requirements template](#)) that dissects your project goal into project phases and milestone meetings

1. Kick-off meeting ([sample agenda](#))
   a. Schedule a kick-off meeting at the beginning of the project to ensure the volunteer(s) and your staff are on the same page with what success looks like
      i. Provide an orientation to your volunteer(s)
      ii. Share your goals for the project
      iii. Talk through historical work that's been completed to tackle your project need in the past
      iv. Speak to the realities of your organization's environment – are there any resource or time constraints that the team should take into account when developing the solution?

2. Milestone Meetings
   a. Use milestone meetings as a chance for your nonprofit to formally provide the volunteer(s) with feedback on draft deliverables throughout the project
   b. These formal feedback meetings will ensure your vision and operating realities are baked into the final deliverable

3. Project Wrap Meeting ([sample agenda](#))
   a. The purpose of the project wrap meeting is to provide space to celebrate the project and to bring closure to the volunteer(s) work by having them present the project process and final deliverable
   b. Consider inviting important stakeholders (board members, other staff, etc.) to this meeting to share the project deliverable and to communicate the value

Project Management Best Practices

Dedicate time to review the work you receive

- ✓ Schedule milestones meetings as formal points of feedback to ensure the project is progressing successfully and to provide your volunteer with thoughtful, candid, honest feedback

Involve all relevant staff

- ✓ Elicit staff feedback to confirm project need and builds employee buy-in

Be flexible

- ✓ Work with your volunteer's schedules and be prepared to make yourself available to them during business and off-business hours

Be open and responsive

- ✓ This is your vision – the volunteer(s) cannot build a great project for you without your input! Tell them when something is AND isn't working

Meet your deadlines

- ✓ The volunteer(s) often has a finite period to complete the project. Cancellations and missed deadlines can delay your project and risk loss of volunteer support

Foster a connection with your volunteers

- ✓ Expose the volunteer to your direct service and the outcomes of their work. If they feel a connection to your organization and the population you serve, that will only enhance their experience and the product they produce
- ✓ Skilled volunteers represent major potential as individuals who continue to be involved with your organization (direct service, donors, skilled volunteers, referrals to other organizations/professionals)

Recognize and thank your volunteer(s)

- ✓ Expressions of gratitude and recognition of their efforts will go a long way toward relationship-building
- ✓ Consider buying food if a meeting happens over lunch

Nonprofit Project Leader Description

Before kicking off your project, it is important to identify the person on your staff who will serve as point person for the volunteer(s). You might be inclined to consider the individual on your team who manages traditional volunteer engagements. Keep in mind that pro bono initiatives require a different set of skills than traditional volunteer management, often unique to the project that you're undertaking.

This role is also a **great professional development opportunity for a staff member**, where he/she could hone project management skills, gain exposure to new sectors, and deepen functional area expertise. Consider if this could be a development opportunity for your staff, and check out what makes for a great nonprofit project lead below!

The staff member you assign should have...

- Significant exposure to the project focus area (i.e. your technology staff for a database project)

- Ability to quickly respond to ensure project momentum. Hint: Your Executive Director is usually not the best choice for this reason!

- Ability to quickly make or facilitate the decisions necessary within a project to move it forward

- Comfort providing feedback and pushing back if the volunteers are off course on their deliverable

- Adaptability and a cross-sector perspective to help bridge the perspectives of your organization and your volunteers

- A focus on relationship development, and seek to cultivate your skilled volunteers to be engaged with your organization long term

- The trust of your staff to know what's best for your project and your organization. Hint: This is usually not your summer intern!

Once you've identified an internal team member to manage the project, the next step is to create the project requirements document. This document will serve as a guide for both your nonprofit team and the volunteer(s) by laying out all of the phases and steps to project completion.

[Project Title] Project Requirements Document
Organization Name

Overview of project

Type of Project:	[Project Name]
Est. Time Commitment:	[Hours per person per week]
Project Duration:	[Time frame]
Project Completion Date:	
Location of Client:	[Nonprofit Address}
Location of Project Work:	Most work takes place virtually, with occasional meetings in person at the nonprofit
Nonprofit Lead:	*Name* *Title* *Phone* *Email*

Appendices

Appendix A: [Information about your nonprofit [mission, program overview].
Appendix B: [Project pertinent materials (ex: financial statements for a finance project, marketing collateral for a marketing project)].

Project Description

Project Context
- Brief introduction to your organization and mission.
- Why do you need this project?
- What will the outcome be of this project on your org and on your mission?

Project Goals
- Succinct summary of the goal/outcome for this project.
- Ex: A team of HR professionals will develop a redesigned performance review process that aligns with the nonprofit's work planning and annual goal-setting processes.

Project Summary
- Project description that outlines the support the volunteer(s) will provide to your organization and the deliverable.
- Ex: Volunteer(s) will support {nonprofit] in defining its goals for a redesigned performance assessment, suggest a process and portfolio of tools that will achieve those goals, and develop up to 2 key tools outlined.

Project Milestones

1. <u>Discovery:</u> Understand ==[nonprofit]== as an organization, confirm pain points and goals for this project, and perform an initial review of ==[focus area of the project].== Create an initial project plan that maps the team's phases of work against a timeline (e.g. GANTT Chart), to be further refined as project progresses.
   - <u>Milestone 1 ==[target date]:==</u> Present initial findings from Discovery, the approach the team will take to achieve the final deliverable and a high-level timeline for the phases of work.
2. ==<u>[Phase 2 title; ex: HR Assessment or Market Analysis]</u>: [Outline the goal of Phase 2].==
   - <u>Milestone 2 ==[target date]:==</u> Deliver ==[Phase 2 deliverable].== Receive feedback from nonprofit.
3. ==<u>[Phase 3 title; ex: Draft development of performance review process; draft recommendations development] :</u>== [Outling the goal of Phase 3].
   - <u>Milestone 3 ==[target date]:==</u> Deliver ==[Phase 3 deliverable].== Receive feedback from Nonprofit.
   ==<u>[Phase 4 title: ex: Process Finalization and Tool Development]:</u>== Incorporate feedback from Nonprofit into draft deliverable and ==[goal of phase 4].==
   - <u>Milestone 4 ==[insert date]:==</u> Deliver ==[Phase 4 deliverable].==
4. <u>Project Wrap Meeting:</u> Create a 30-45 minute PowerPoint presentation, keeping in mind that some stakeholders may not be familiar with the project process.
   - <u>Milestone 5 ==[insert date]:==</u> Present a summary of the project process and final [instert deliverable] developed, hand off the final deliverable, and celebrate the volunteer(s)' hard work with the nonprofit at the project wrap meeting.

Project Deliverables

At the completion of this project, ==[nonprofit]== will have:
==List each deliverable in a separate bullet.==

Steps to Completion

Over the course of this ==[insert length]== project, the volunteer(s) will be responsible for the following main tasks:

PHASE 1: Kick-Off and Discovery

1. Prior to the kick-off meeting, the volunteer(s) will review the project requirements document and note any questions that arise.

2. Volunteer(s) and [nonprofit] will attend an introductory kick-off meeting as a chance to learn more about [nonprofit] and to begin asking questions about the project. This meeting can take place virtually via an online meeting platform to accommodate non-local volunteers. If project volunteers are local this meeting may also take place in person at the nonprofit, provided they are able to accomodate. During the kick-off meeting, the volunteer(s) will:
   a. Meet with [nonprofit] to learn more about the organization, and why this project is a priority for them.
   b. Review the requirements document and discuss the project goals and deliverables.
   c. Ask questions to identify information gaps and gather any information needed to begin the project.
   d. Establish a weekly, 30-60-minute check-in call with the nonprofit lead to gather information and feedback, check assumptions, communicate status updates, and answer questions.
   e. Set a target date for the discovery findings presentation.

3. Develop a high-level project plan that outlines the phases of the project and workstreams involved, mapped against a timeline.
   a. This plan is a starting point, to be expanded and refined as the project progresses. Many teams use a GANTT chart format.
   b. Ask the nonprofit if there are any important dates that will impact the project such as major events that will reduce their capacity, or busy periods when a service interruption should be avoided.
   c. Review the volunteer(s) availability and capacity in the context of work interdependencies to prevent stalls.

   d. Share a copy of the project plan and timeline with the nonprofit lead.

4. Perform an assessment of [project area focus, ex: current performance review process], documenting challenges with the current process and identifying goals for the new [project deliverable].
   a. Interview nonprofit staff to understand the nonprofit's current state and goals for the final deliverable.
   b. Review documentation of the current state that the nonprofit has available for the team.

5. Create a discovery findings document and/or presentation to review with [Nonprofit].
   a. Briefly review the project phases, highlighting the current phase, and the initial project goals and deliverables.
   b. Describe the volunteer(s)' discovery process.

   c. Present the volunteer(s)' findings the discovery process.

   d. If the team is leaning towards any particular recommendations at this point, share a bit of information about those potential recommendations and ask any questions that will help the volunteer refine its direction in preparation for the next phases of the project.

Milestone 1 [target date]: Present initial findings from Discovery, the approach the team will take to achieve the final deliverable and a high-level timeline for the phases of work. Receive the nonprofit's feedback and approval on the proposed project plan.

PHASE 2: [Phase 2 title]

1. [Steps the team will take to complete Phase 2]

Milestone 2 [target date]: Deliver [Phase 2 deliverable]. Receive feedback from nonprofit.

PHASE 3: [Phase 3 title]

1. [Steps the team will take to complete Phase 3]

Milestone 3 [target date]: Deliver [Phase 3 deliverable]. Receive feedback from nonprofit.

PHASE 4: [Phase 4 title]

1. [Steps the team will take to complete Phase 4]

Milestone 4 [target date]: Deliver [Phase 4 deliverable]. Receive feedback from nonprofit.

PHASE 5: Project Wrap Meeting (see sample agenda)

1. The project wrap meeting is an opportunity for the volunteer(s), the nonprofit, and other stakeholders to celebrate the success of the project. This meeting can take place virtually via an online meeting platform to accommodate non-local volunteers. If project volunteers are local, this meeting may also take place in person at the nonprofit, provided they are able to accomodate.

2. Work with the nonprofit to determine their desired audience and location for the project wrap meeting.

      a.   Some nonprofits prefer to invite stakeholders, such as Board members, who were not heavily involved in the project process so they can receive an overview of the project and its outcomes. Other nonprofits prefer to invite only those who were involved in the project.

3. **Create a 30-45 minute PowerPoint presentation for key stakeholders**, keeping in mind that some stakeholders may not be familiar with the project process. This should include:
   a. Volunteer(s) presents initial project challenge, approach and process
   b. Volunteer(s) highlights key features or points in the deliverable
   c. Volunteer(s) outlines maintenance and any outlying next steps for nonprofit staff

<u>Milestone 5:</u> By <mark>[target date],</mark> schedule and attend a wrap meeting where the volunteer(s) will:

   a. Share the end-of-project presentation with key stakeholders.
   b. Answer any remaining questions about the project process and final deliverables.
   c. **Celebrate the volunteer(s)' hard work and accomplishments**!

EVALUATION

1. Fill out <mark>[Nonprofit's]</mark> feedback survey to provide reflections on your volunteer experience, process, and any personal learnings.
2. Please report final volunteer hours to <mark>[Nonprofit].</mark>

Appendix A: Nonprofit Information

Organization Name

Address

Organization Name Contacts

Primary Contact:

Mission:

Programs:

Appendix B: Project Specific Information

Evaluating your Project

Evaluation Needs by Stakeholders
An outline of the most prominent needs by stakeholder group to support you in developing effective tools and metrics to successfully evaluate your skills-based volunteer project.

Skills-Based Project Evaluation Tool
A survey tool to evaluate your skills-based engagement.

A PURPOSE-DRIVEN WORKFORCE.
A STRONGER COMMUNITY.

Motivations by Stakeholders to Drive Data Collection

Now that you have completed your project, it is time to dive into evaluation! Considering the diverse needs and motivations of your stakeholders will support your organization in developing effective tools and metrics to successfully evaluate your skills-based volunteer project. See below for a snapshot of the most prominent needs by stakeholder group.

Nonprofits

- Gauge impact on operational effectiveness
- Build case for future capacity investments
- Disseminate impact data to key constituents

Companies and Funders

- Assess grant dollars leveraged
- Appraise nonprofit effectiveness
- Determine impact on employee recruitment and retention
- Measure social return on investment

Volunteers

- Identify leadership and professional development enhancement
- Measure community engagement impact from investment

common impact

A PURPOSE-DRIVEN WORKFORCE.
A STRONGER COMMUNITY.

The next and final step, once you have considered different stakeholder's motivations, is to develop the tools to evaluate your project. Measuring project impact and evaluating the volunteer(s)' experience enables your organization to not only improve processes for future engagements, but also provides you with the proof points to demonstrate the value of skills-based volunteering to key stakeholders.

The scope of your evaluation can range from small to complex, depending on what's feasible for your organization. To measure impact effectively, evaluations should be performed accurately and consistently over an extended period of time.

Evaluating the success of your pro bono project over the short, medium, and long term will allow you to gauge and communicate the project's impact on your organizational capacity and ultimately, in meeting your mission. In conducting your post-project examination, you may find it helpful to leverage the Evaluation Tool on the next few pages. You can also find an online version of this tool at: http://www.readinessroadmap.org/evaluation-tool.

Project Goals

The project's role in helping us meet our organization's overall strategic goals or program   strategy remained as anticipated.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

The top 3 project goals that were identified before the project began were met.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

The project success metrics that were identified before the project began were met.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

Project Scope

The project met the major project components and milestones as defined in the original   project scope.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

The project stayed within the timeline as defined for each of the project components and milestones defined in the original project scope.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

The skilled-volunteer team experience and expertise aligned well with the work that needed to be accomplished to reach our project goals.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

The project plan outlined at the start of the project was referred to frequently while the project was in progress and course corrections were made, as needed.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

Project Leadership

Our staff project lead was able to dedicate the time required to successfully lead the project for our organization.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

Our staff project lead was able to make or facilitate project decisions in a timely matter.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

Our staff project lead was able to successfully share the knowledge of the challenge addressed through the project with the skills- based volunteers.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

Our staff project lead and volunteer team developed a strong working relationship and were able to communicate quickly and effectively (on project feedback, to resolve any project issues, etc.) during the course of the project.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

Post Project Support Plan

Our staff received the required training to ensure that the work on the project was incorporated and maintained in our organization after the volunteers transitioned off.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

The project has been integrated into the organization's day-to-day operations.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

We have saved the project materials developed by the volunteers (project plan templates, decision trees) to use for future internal projects.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

The key stakeholders that need to be kept engaged about the integration of the project and carrying it forward are kept apprised in a timely manner.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

We have secured (or developed a plan for) financial resources (cash or equipment grants, corporate sponsorships) to sustain the project in the long-term.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

Outcomes Reporting

We have defined metrics that will help our organization continue to measure the impact of this project over time.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

We informed our key stakeholders about the start and completion of the project (newsletters, press release, 1:1 meetings).
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

We communicated impact data to our key stakeholders (cost savings, time savings, additional dollars raised, increase in client inquiries).
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

We have incorporated the impact data gathered from this project into our marketing collateral (case studies, stories etc.) to demonstrate our strengthened organizational capacity with key stakeholders.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

Engagement of Volunteers

We have requested project feedback from our volunteers to understand their perspective on project success.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

We have incorporated the project feedback received from our volunteers into our approach to volunteer engagement.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

Our volunteers (or a subset) have remained engaged with our organization after the project came to a close.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

We have added the volunteers to our ongoing communication lists (newsletters, annual appeal letters etc.) to ensure continued exposure to our programs.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

We have recognized the work of the volunteers and have kept them apprised of our progress on carrying the project forward within our organization.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All

After this project, we are more inclined and ready as an organization to engage another team of skills-based volunteers to meet another organizational challenge.
- ☐ Achieved
- ☐ Mostly Achieved
- ☐ Sort of Achieved
- ☐ Not At All