Engaging Pro Bono and Skills-Based Volunteers

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Director, Education & Training
Agenda

- The Pro Bono Landscape
- Integrating Pro Bono Volunteers
- Communication and Involvement
- Designing Good Projects
- Building on a Strong Foundation
- Supporting the Relationship
- Putting Together a Plan
Nonprofits Have the Need

<table>
<thead>
<tr>
<th>FIELD</th>
<th>PRO BONO USE</th>
<th>ADDITIONAL NEED</th>
</tr>
</thead>
<tbody>
<tr>
<td>Marketing</td>
<td>41%</td>
<td>52%</td>
</tr>
<tr>
<td>Human resources</td>
<td>30%</td>
<td>35%</td>
</tr>
<tr>
<td>Financial and administrative support</td>
<td>29%</td>
<td>28%</td>
</tr>
<tr>
<td>Financial advisory or consulting</td>
<td>27%</td>
<td>43%</td>
</tr>
<tr>
<td>Information technology</td>
<td>27%</td>
<td>37%</td>
</tr>
<tr>
<td>Organizational design or coaching</td>
<td>26%</td>
<td>45%</td>
</tr>
<tr>
<td>Board member or executive search</td>
<td>20%</td>
<td>46%</td>
</tr>
</tbody>
</table>

Volunteers Have the Skills

<table>
<thead>
<tr>
<th></th>
<th>Among my career skills</th>
<th>Have done as volunteer</th>
<th>Gap</th>
</tr>
</thead>
<tbody>
<tr>
<td>Computers/hardware/software</td>
<td>49%</td>
<td>28%</td>
<td>-21</td>
</tr>
<tr>
<td>Operations/project management</td>
<td>36%</td>
<td>18%</td>
<td>-18</td>
</tr>
<tr>
<td>HR/recruitment and training</td>
<td>33%</td>
<td>16%</td>
<td>-17</td>
</tr>
<tr>
<td>Strategic planning</td>
<td>30%</td>
<td>16%</td>
<td>-14</td>
</tr>
<tr>
<td>Marketing/communications</td>
<td>35%</td>
<td>22%</td>
<td>-13</td>
</tr>
<tr>
<td>Information technology</td>
<td>24%</td>
<td>12%</td>
<td>-12</td>
</tr>
<tr>
<td>Program development</td>
<td>29%</td>
<td>18%</td>
<td>-11</td>
</tr>
<tr>
<td>Fundraising/development</td>
<td>28%</td>
<td>32%</td>
<td>+4</td>
</tr>
</tbody>
</table>

Source: Hart Consulting and VolunteerMatch Survey - 2010
Impactful...

Pro Bono volunteers can

- Bring specific skills and expertise
- Provide singular focus on projects
- Expand the capacity of paid staff
But not easy...

There can be pitfalls

- Wrong volunteer for the role/organization
- Unreasonable scope
- Volunteers improperly screened – paid staff improperly prepared
- Previous bad experiences can influence staff attitudes and enthusiasm
Integrating Pro Bono Volunteers

Keys for building buy-in

- Communicate to others – paid and volunteer staff
- Agree on skills and expertise, and screening criteria
- Manage scope with position descriptions and deliverables
- Clear reporting structure and decision-making responsibilities
Communicate to Build Buy-In

Identify Stakeholders

- Board, Exec. Management, Program Managers, Paid Staff, Volunteer Staff
- Assess where each stakeholder is on the engagement continuum
- Work with Champions - Share persuasive information with Information Seekers, Opponents
Involve Others in the Process

Engage supervisors or program managers in the process to build buy-in

- What does a volunteer need to know, do or be to be the right volunteer?

Clear and comprehensive position descriptions

- Responsibilities, decision making continuum

Interviews and screening process

- Screen for culture and fit not just for skills and traits (and not just “people like me”)

VolunteerMatch

Learning Center
Design Successful Projects

Successful projects include:

- Measurable deliverables or outcomes
- Accountabilities and responsibilities
- Timeline with evaluation

Manage scope to create more successful skills-based opportunities for Pro Bono volunteers
Resources for Designing Projects

Taproot Foundation Resources
https://taprootfoundation.org/resources/common-pro-bono-projects-catalog/

Common Impact Skills-Based Volunteering Tool Kit
https://www.capacitycommons.org/
# Engaging Pro Bono and Skills-Based Volunteers

## Pro Bono and Skills-Based Volunteer Worksheet

<table>
<thead>
<tr>
<th>Pro Bono Project</th>
<th>Specific Goals or Deliverables</th>
<th>Skills and Experience Needed</th>
<th>Internal Stakeholders</th>
<th>Timeline and Evaluation</th>
</tr>
</thead>
<tbody>
<tr>
<td>Market Research User's Survey</td>
<td>Research features and price of possible tools</td>
<td>Familiar with online survey tools</td>
<td>Product Manager, Front-end Engineers</td>
<td>6-8 weeks including report delivery</td>
</tr>
<tr>
<td></td>
<td>Create questions</td>
<td>Experience writing and analyzing surveys</td>
<td></td>
<td>Begin late January/early February</td>
</tr>
<tr>
<td></td>
<td>Design survey including A/B testing strategy; timing, etc.</td>
<td>nice to have; Familiar with VolunteerMatch</td>
<td></td>
<td>Volunteer will check in with Product Manager weekly</td>
</tr>
<tr>
<td></td>
<td>Review survey results and create a report including recommendations</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Pro Bono and Skills-Based Volunteer Worksheet | Engaging Pro Bono and Skills-Based Volunteers
Key Program Foundations & Documents

Ensure everyone is on the same page!

- Position description
- Agreement letter that includes a timeline
- NDA or confidentiality agreement
- Policies and procedures manual – as appropriate
- Intellectual property, conflict resolution, termination, etc.
Finding the Right Volunteer

- Recruit through appropriate channels - VolunteerMatch, corporate partners, professional associations
- Explore existing volunteer’s skills
- Tap into your network – donors, members, supporters
- Screen for skills, experience, and cultural fit
- Orient to work and organization
Support the Volunteer/Paid Staff Relationship

Supervisors may not have much management experience

- Start with the volunteer management basics
- Share resources – blogs, webinars, etc.

Facilitate the relationship

- Let go without checking out
- Assist in managing expectations
- Remove barriers, help solve challenges
- Design meaningful recognition
Evaluating Pro Bono Volunteer Engagement

There will be challenges

- Implement regular check-ins, build on them
- Share challenges and solutions across supervisors and projects
- Solicit feedback from supervisors and volunteers
- Share with your Information Seekers – great information for your communication channels!
Putting a Plan in Place

- Identify stakeholders and strategic needs
- Invest in foundation documents and processes
- Create clear and manageable scope
- Conduct appropriate screening and orientation
- Develop and build-on evaluation points
- Share impact and create meaningful recognition
Thank you!

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