

LEADERSHIP EASTSIDE, CLASS OF 2011
TEAM 5
Final Project Report

Executive Summary: Class of 2011 Team 5's project involves finding ways to improve the volunteer experience for both volunteers, including specifically volunteers with specialized skills, and non-profit agencies, resulting in better use of volunteers and a resulting increase in capacity for the non-profits. Specifically, Team 5 is piloting this process with two Eastside agencies, including developing and administering an assessment tool (survey), analyzing the results, providing feedback to the user agencies, and working with them to develop an action plan for instituting improvements in their volunteer management process.

1. How our project came to be. Team 5 is a group of nine LE participants who came together with the loosely defined common objective of matching volunteers on the Eastside, particularly those with specialized skills, with meaningful and lasting volunteer opportunities. Our goal was to produce a sustainable project that will have real benefit to end-users and will be sustainable and expandable over time.

Originally, we discussed creating a kind of volunteer bulletin board or exchange, probably a website, which would allow nonprofit organizations to reach out to volunteers and allow volunteers to identify opportunities. Initial research showed, however, that any number of such web sites already exist, including a comprehensive site run by United Way. We held preliminary discussions with various agencies, including Taproot Foundation, United Way and Executive Service Corps of Washington. Those conversations helped us focus instead on how agencies recruit volunteers, particularly those with specialized skills and how well the volunteer assignment is identified, planned and managed by the recruiting agency. It became clear that ensuring that the volunteer has a good experience is a key to that volunteer continuing his or her relationship with the agency. In that way, the agency gets the full benefit of the volunteer's time. There was a consistent theme throughout our discussions – that non-profits need volunteers, but do not always have the time or resources to plan for and manage them, particularly when it comes to those with specialized skills. In other words, there are two goals: one is to educate non-profits about best practices for managing volunteers, and another is to find ways to help non-profits make use of skills-based volunteers. Ultimately, the overall goal is to raise volunteer engagement and retention.

Through Executive Service Corps of Washington ("ESCWA"), we became aware of the Community Experience Project ("CEP"), a national initiative of Atlantic Philanthropies, a New York based foundation. The CEP is focused on improving our communities' ability to access and use the talents and skills of experienced adults. One specific focus is "baby boomers" who will be retiring in record numbers in the next few years – and who hopefully will be searching for ways to become involved in the community. The local CEP effort is a collaboration between the Seattle Foundation and the Next Chapter of Puget Sound. The ESCWA provides oversight of

the project in conjunction with a steering committee comprised of 10 members from the following organizations:

- Seattle Foundation
- ESCWA
- Girls Scouts of WA
- King Co. Retired & Senior Vol. Program (RSVP)
- Senior Services
- United Way
- YWCA
- Philanthropy Northwest

2. The opportunity. Over the next 15 years, the baby boomer population, which includes over 500,000 people in the King County area, will be creating and negotiating transitions in their work and civic life. A high percentage of this population has professional skills and an interest in service to community that will lead them to volunteer their talents to the social sector or to seek employment in non-profit organizations, schools and civic organizations. According to the Corporation for National and Community Service, Seattle has the fifth highest level of volunteering in the U.S. An estimated 936,000 people in the city's metro area put in about 56 hours of volunteer work per year. However, the area lags behind other communities in putting the abundant professional skills available to use. The Seattle metropolitan area is 9th in the nation in terms of people with Bachelors degrees and 16th in percentage of the population with advanced degrees engaging in volunteer activities. Within this reservoir of talent and experience are many skills needed by nonprofits, schools, and civic organizations, including financial and human resource management; technology expertise; teaching, coaching, mentoring, marketing and communications skills. One of biggest reasons people stop volunteering is the gap between expectations and the reality of the volunteer experience.¹ It is suggested by those watching trends in volunteer management that baby boomer volunteers, as well as those from younger generations, will expect even more tailored volunteer opportunities. A good volunteer match is more likely to be satisfying to both the volunteer and the organization, and it is likely to endure longer as well. They also suggest that nonprofit organizations which are more aware of the changing volunteer marketplace will be able to attract more effective volunteers.

3. The project. As discussions continued both within the team and with the CEP, it was suggested that we pilot a portion of the CEP, the Volunteer Impact Program, a collaborative project with United Way of King County, Seattle Works and ESCWA. The project is designed to send teams of volunteers into non-profit agencies to assess how the agencies manage volunteers, and to assist the agencies in developing action plans for improving their volunteer management. This process would assess the organization's program at a single point in time and provide a snapshot of perceptions throughout the organization (which might be different from what management believes). The project design involved the use of an assessment tool to measure those perceptions and the state of an agency's current volunteer management. When

¹ Statistics from *Portals for Volunteers in the Puget Sound*, October 15, 2008, as provided to us by Executive Service Corps of Washington.

completed and analyzed, the audit would provide an organization with information about its volunteer program that can be used as a planning tool going forward.

Originally, the intent was that Team 5 would create the volunteer management assessment tool. It turned out, however, that representatives of the CEP Steering Committee from United Way of King County and the YWCA had already identified an existing volunteer assessment developed by Energize, Inc. It therefore was determined that a first step for our team should be to review that tool and assess its applicability. Energize's survey consists of 12 sections providing an overview of the volunteer management discipline, but none of them directly relate to volunteers with specialized skills. As a result, part of our project became the creation of a new Section 13 for use with the survey which focuses specifically on that issue. The combined survey will be used in assisting non-profit agencies in better using – and retaining – the skills of volunteers through analysis of their volunteer management programs, including

- planning and resources,
- staffing,
- volunteer work design,
- recruitment,
- interviewing and screening,
- orientation and training,
- volunteer/employee relations,
- supervision,
- recognition,
- recording keeping and reporting,
- evaluation,
- volunteer input and
- use of volunteers with specialized skills.

Audit results will provide information regarding:

- The awareness of different levels of the organization in understanding what it takes to support volunteer involvement successfully.
- How effectively volunteers are incorporated into the work of the organization.
- The strengths and weaknesses of the current volunteer management system.

- What the organization can do to raise the profile of volunteer managers, increase effectiveness and help to utilize volunteers with specialized skills.
- What contributes to a successful volunteer program (EDUCATION).
- The status of the present volunteer effort (EVALUATION).
- The possibilities for the future (VISION).
- The next steps to take to move forward (A PLAN).
- Support needed from which parts of the organization (RESOURCES).

4. Our community partners. The next step was to identify non-profit agencies to be used as the pilot for the project, including vetting the draft of Section 13. We were especially pleased that because of our involvement, the initial audits would be on the Eastside. The CEP had already determined that a major priority was to focus on organizations serving people experiencing homelessness and poverty. We contacted Hopelink and Congregations for the Homeless, each of which graciously – and enthusiastically – agreed to participate. On April 13 and 14, 2009, we kicked off the pilot audit assessment program with Hopelink and Congregations for the Homeless. At this point, we have used the preliminary draft of Section 13 (relating to the use of volunteers with specialized skills) in the audit of Congregations for the Homeless, but are working with Hopelink to further revise the language and design of the section. We will also be working further with the CEP on the section design and content.

As this report is being prepared, we are in the process of analyzing 33 completed surveys from Hopelink and 4 from Congregations for the Homeless. We have designed a database to analyze results; upon receipt of the completed surveys, we will tally scores and prepare a report with the results, including general observations, priority issues for attention and recommended next steps. The final report for each organization will be submitted to its management for review and consideration. A final report will be presented by Team 5 to Hopelink’s executive directors and board members at its June 16, 2009 board meeting. A final report also will be presented to Congregations for the Homeless over the summer.

5. Looking forward. In addition to providing audit results to the community partners who have participated in the initial pilot, we will be giving feedback regarding survey results to Executive Service Corps of Washington in support of procuring additional grant funding for the CEP. We will also continue to refine new Section 13 of the audit specifically dealing with volunteers with specific skills for use by the CEP throughout the region. As a result, completing the survey will help not only the agency participating, but also the larger project.

Looking forward, the goal of Team 5 is to use years 2 and 3 of our Leadership Eastside experience to further that larger project, both by working further on the survey form itself, the analysis tools, testing the survey on other Eastside agencies and working with the CEP to expand its roll out of the tools. Ultimately, the tool and analysis of the results could be used by non-profits throughout the region, and in fact, could be used as an annual or semiannual assessment of progress.

We are pleased to report that one of our main goals – a work product that is both useful and sustainable – seems to be within reach.

6. Thank you. We would like to take this opportunity to once again thank the Community Experience Project, and especially Executive Service Corps of Washington, United Way of King County and the YWCA for their willingness to include us in this project. We particularly want to acknowledge Nancy Long (ESCWA), Lori Williams (ESCWA), Nikki Russell (United Way of King County) and Lisa Caissie (YWCA) whose vision helped get us connected with this process.

Heartfelt thanks, too, to Hopelink and Congregations for the Homeless for their enthusiasm and openness in participating in the pilot of the audit and assistance in refining Section 13 related to the use of volunteers with specialized skills. Our hope is that they receive as much from the experience as we have, and that their assistance has also resulted in a work product that will help them improve their volunteer programs. While there are too many people who helped us to mention each by name, special acknowledgement to Sheila Sloan-Evans and Alice Ferrier (Hopelink) and Steve Roberts (Congregations for the Homeless) for all of their help and encouragement.

Leadership Eastside Class of 2011, Team 5:

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