

# **CORPORATE ENGAGEMENT:**

## **IS YOUR ORGANIZATION READY TO ENGAGE?**

Center for Nonprofit Excellence  
[cncoloradosprings.org](http://cncoloradosprings.org)  
719.575.4341

# CENTER FOR NONPROFIT EXCELLENCE



- We believe nonprofits radically strengthen our community
- We strengthen nonprofits through the resources and services we provide – educational workshops, consulting, roundtables, and more!
- A champion for all causes, we connect nonprofits, businesses, and individuals with what they need to create social change

Center for Nonprofit Excellence

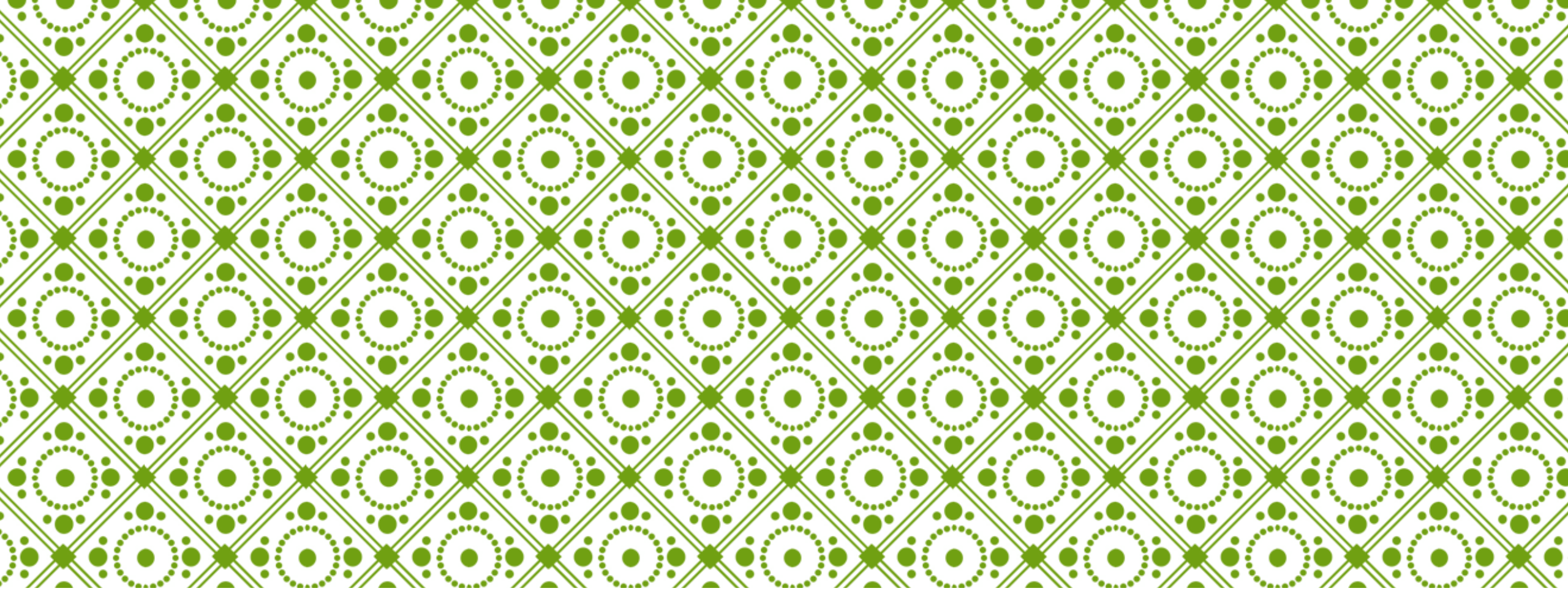
[info@cncoloradosprings.org](mailto:info@cncoloradosprings.org)

# IS MY ORGANIZATION READY FOR SKILLS-BASED VOLUNTEERS FROM CORPORATE TEAMS?

Skilled-volunteers derive value from giving what they know, while nonprofits get access to expertise that helps them solve a pressing organizational need. One great experience can generate short and long-term returns for nonprofits and skilled-volunteers.

# IS MY ORGANIZATION READY FOR SKILLS-BASED VOLUNTEERS FROM CORPORATE TEAMS?

On the other-hand, nonprofits that engage skilled-volunteers before they are ready can find the drawbacks to be considerable. Some organizations find the value of their skilled-volunteer engagement was not worth the time or money spent; other organizations find solutions delivered are a mismatch for their needs; while other engagements may leave skilled-volunteers feeling under-utilized, under-appreciated, or frustrated. Any of these outcomes can have real consequences for the nonprofit's reputation as an organization that can effectively leverage outside resources to deliver quality services most cost-effectively



# FIVE CHARACTERISTICS OF READINESS



# STRONG EXECUTIVE LEADERSHIP

Definition: Conveys a strong social vision, energizes and listens to stakeholders, and leverages opportunities to innovate and meet changing client needs

## What Works:

- When first meeting with skilled-volunteers, share your vision and roadmap for how your organization plans to realize this vision. Treat this first meeting as a “donor pitch” with three goals:
  1. engage your skilled-volunteers in your vision for the future;
  2. communicate openness to their insights about your organization; and
  3. convey your desire to partner together to improve how your organization meets community needs.

# POTENTIAL TO CREATE DEEP SOCIAL IMPACT

Definition: Takes a compelling vision, breaks it into programs that work, and hones the model over time to achieve the mission

## What Works:

- When first meeting with skilled-volunteers, share your vision and roadmap for how your organization plans to realize this vision.
- Have nonprofit leadership communicate the story of how the organization began – focus on how programs developed and how they serve community needs.
- Draw a clear connection between the work your skilled-volunteers will do and how it will benefit the people your organization serves.

# EFFECTIVE RELATIONSHIP BUILDING

Definition: Leverages external resources, engages people with different points of view and experience, solicits feedback, and sustains long-standing partnerships

## What Works:

- Think of skilled-volunteers as short-term staff and provide training, exposure to programs, and introductions to staff.
- Learn about your skilled-volunteers and their motivations: ask about their background, interests, skills, and goals for involvement – then develop a role that meets these objectives.
- Ask about their experience during, and after, their involvement – the feedback provides an opportunity to refine skilled-volunteer management and shows that satisfaction matters to your organization



# ORGANIZATIONAL STABILITY

Definition: Solid financial and operational footing, with no significant management, staff or board turnover in the last few years

## What Works:

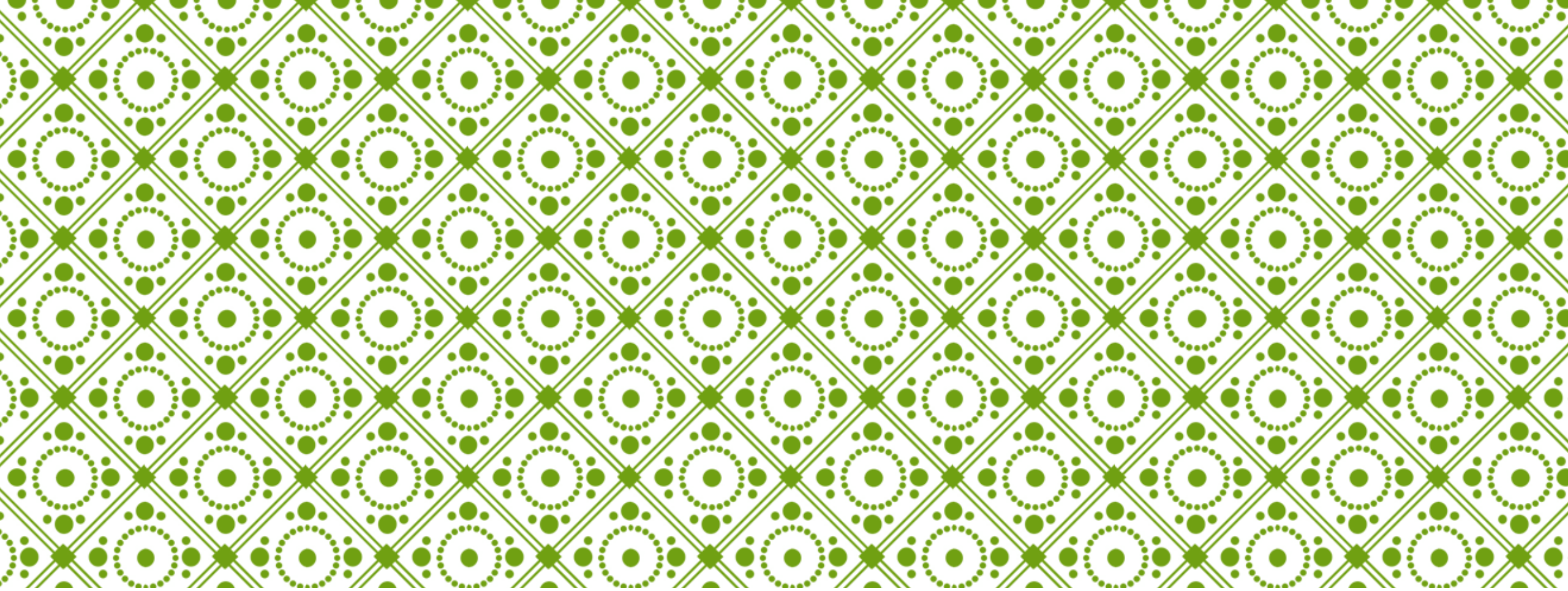
- Skilled-volunteers want to help a strong organization build a foundation for on-going sustainability. Sharing testimonials, outcomes data, or asking a client to share his/her story with your skilled-volunteers; are all effective ways to convey this.
- Connect skilled-volunteers with organizational leaders, tenured board or staff and ask them to share what keeps them engaged – information about the great work you are doing now will help skilled-volunteers see how your organization is poised for future success.

# STRATEGIC ENGAGEMENT OF SKILLED-VOLUNTEERS

Definition: Connects the work of skilled-volunteers to the organization's ability to strengthen its foundation for greater sustainability

## What Works:

- Skilled-volunteers want to know how their skills will help move the needle on your organization's ability to meet its mission and vision. To convey this, share information from your strategic plan, board retreats, or other planning exercises and define how volunteers' expertise will help address a specific issue.
- Use every meeting as an opportunity to communicate that your skilled-volunteers' expertise is essential to cracking an organization wide challenge – and be specific about the benefits your organization will receive after solving it.



**PROJECT READINESS: IS NOW THE RIGHT  
TIME TO TACKLE THIS CHALLENGE?**



# FOUR CHARACTERISTICS OF PROJECT READINESS

- Completed Pre-Project Groundwork
- Clear Buy-In and Decision Making
- Post-Project Support Plan
- Defined Project Leadership

# COMPLETED PRE-PROJECT GROUNDWORK

Definition: Defined project goals and success measures, and clarity on what skilled-volunteers need to know in order to start their work right away

## What Works:

- Create a “prep-pack” – all the information skilled-volunteers need to know to get started on the project. For example, if your organization were starting a website project, provide examples of websites your organization likes, include font and color-scheme preferences, and provide your logo in electronic format.
- Provide these materials ahead of time so skilled-volunteers can come to your first meeting with specific questions and spend the bulk of the time digging into project goals and scope.

# CLEAR BUY-IN AND DECISION MAKING

Definition: Consensus across stakeholder groups about the value of the project, and clear roles and responsibilities defined for all project stakeholders

## What Works:

- Staff and board, as needed, have agreed on the value of spending organizational resources on the project your organization has in mind – a great way to show this is inviting staff and board to the project kick-off and having them share why the project is considered high-priority by all.
- Define stakeholder roles and responsibilities: who needs to give feedback during the project; who can review and sign-off at critical milestones; who only needs updates on the project timeline? Be able to provide these answers at the kick-off.
- Decide who will be the project decision-maker. Most projects encounter a few points when one person will have to reconcile different points of view. Defining who will “make the call” keeps the project moving forward.

# POST-PROJECT SUPPORT PLAN

Definition: Brings staff up-to-speed on the tools or systems delivered by skilled-volunteers, and dedicates resources to maintaining the results of the project once in place

## What Works:

- Define who will maintain what your skilled-volunteers deliver; this is critical to the long-term value of the project. For example, if your skilled-volunteers are delivering a database, who will enter information? Who will make sure the data is correct? Identifying this person (or people) before the project begins allows them to ask questions along the way and learn from your skilled-volunteers. This way you won't find yourself with a great new database with the capability, but not the data-quality, to generate the reports you need.
- Consider working with your skilled-volunteers to develop a training plan for staff; this further engages volunteers and ensures that multiple people on staff know how to use and maintain what the volunteers have delivered.

# DEFINED PROJECT LEADERSHIP

Definition: Designate a point person with the time, tenure, and project leadership skills to manage the project effectively

## What Works:

- The most successful skills-based engagements have an effective nonprofit project manager at the helm. This person provides one point of contact to the skilled-volunteers, connects them with the information and resources they need for their work, and helps manage the expectations and timeline of the project.
- If the project lead is not the project decision-maker, the lead should engage the decision-maker often to make sure the project is aligning with the decision-maker's goals.



# CHARACTERISTICS OF A GOOD PROJECT

- **Clearly Defined Scope:** A written document that outlines what is in – and out of – scope will ensure all parties are on the same page about what is included in the project.
- **Two-Way Sign-Off:** After generating the scope document, the main project stakeholders and skilled- volunteers can review the document and sign-off during the initial project “meet and greet”.
- **Defined Deliverables:** Clearly articulating what you would like your skilled-volunteers to deliver at the end of the project provides a clear direction from the start.
- **Identified Project Milestones:** Defining project milestones – both timing and what will be delivered at each point – allows skilled-volunteers to have a clear sense of what your organization needs from them and when.

# CHARACTERISTICS OF A GOOD PROJECT

- **It's Not Time Sensitive:** If time is of the essence, hiring a consultant is always an option. However, if your organization is looking for a way to build mutually beneficial relationships while also reducing project cost, skilled-volunteers are a great option – but the trade-off can often be the project timeline.
- **Can Be Completed Remotely:** Skilled-volunteers tend to contribute their time after work-hours or on weekends, so selecting a project that can be completed largely offsite will increase the likelihood of finding volunteers for your project.
- **Minimized Risk:** Some projects require the nonprofit to provide skilled-volunteers with access to business-critical data; when this is the case, consider how to mitigate these risks. For example, when working with skilled-volunteers on developing a new website, make sure site content is backed up in case the new site launch isn't successful the first time.

# THANK YOU!



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