

Getting Help that is Helpful

How to get the right volunteers

By: Marc Osten and Lisa Silverberg

Technology support providers and nonprofits, especially small nonprofit organizations, often find themselves challenged to effectively manage volunteers to deliver services and support administrative functions. In recent years, many people with technology skills have become increasingly motivated to donate their time and expertise to nonprofits, just as one would spend time delivering meals to homebound elderly. Often the first reaction to this help is "great--bring it on!" In many cases, these sorts of volunteer/nonprofit matches have had positive results, moving organizations with little technological capacity into a whole new league, making them more efficient, opening up new possibilities about how to do their work. But there can be many pitfalls in relying on volunteers that make offers of help not too helpful.

A group of Washington, DC nonprofit Executive Directors graduated from the Summit Collaborative's Strategic Technology 'Readiness' program offered by Technology Works for Good as part of their Technology Leadership Development initiative. Technology Works for Good (TWFG) is a 501(c)3 nonprofit organization that helps other nonprofits in the Washington, DC Metropolitan area use technology to support their missions. One of the most interesting sessions of the peer learning group included a dialogue about strategies to make the most of these offers of volunteer help. Here are some of the lessons we and the participating nonprofits learned.

Be Clear About Your Needs: Often someone will come in with lots of enthusiasm and offer to do something for you that is not high on your priority list. Accepting the help can draw your supervisory and management attention away from other priorities. The reality is that no mission-related technology project can be fully outsourced - volunteers need your time, information, and leadership - there is only so much of that to go around. One Executive Director in the program, Cassandra Burton of the African American Women's Resource Center, emphasized that a volunteer's "gung-ho enthusiasm" for projects not aligned with their mission just distracted her from accomplishing explicit organizational goals.

Make Sure the Skills Are There: If there is alignment between your actual needs and a volunteer who offers to help, be sure that the volunteer has the skills to do the job. A recurring theme Executive Directors in all our programs talk about is the experiences they have with volunteers who "claim" they could do things they really were not skilled to do. One Executive Director in a session shared that she interviews would-be volunteers as if they were potential employees. She asks volunteers flat out: "Do you know how to use 'this' (technology) to do 'that' (task)?" She has even gone so far as to ask potential volunteers to demonstrate their competency in using desktop publishing software to create a page of the newsletter. We think this is a great idea and encourage any of you using volunteers to follow this example.

Get a Clear Commitment: Readiness program participant Amanda Nevers, Executive Director of Ophelia's House in Washington, DC, asks volunteers to sign contracts before

beginning work. Even though volunteers are not paid, Nevers says contracts help her outline expectations, deliverables, timelines, etc., so that she and her volunteer are clear on what they both expect from each other.

Understand Your Choices First: Volunteers are often excited to share their solutions to problems. We suggest that you consider having volunteers do research to present the strengths and weaknesses of various potential solutions rather than jumping ahead to implement a particular solution. A technologically savvy volunteer might be most useful to your organization if he or she focuses on investigating and presenting options, not implementing them.

Think Sustainability: Keep sustainability in the forefront of your mind. If a volunteer is providing you with a solution - a Web site or a database for example, will she/he also work with you to build your capacity to maintain it on your own? Will she/he leave you with written documentation on how to manage the systems? Will she/he connect you to vendors or consultants you can rely upon to manage the systems? Have you considered the total cost of ownership of the system? Readiness program graduate, Dorothy Marshak, Executive Director of Community Help in Music Education (CHIME), was left with a volunteer-created Web site she can't update. As a result, she is dependent on a third party for even minor updates that she could do herself if she had the basic knowledge required to do so.

The Executive Directors in the program made important connections with each other and had much to share. Here are some of their suggestions for other Executive Directors to think about:

Before engaging with volunteers, contractors, and vendors, spend a fair amount of time clarifying what you need and what you expect from the project. Saying, "we need a new database," is just not enough. Practice stating what you want by trying to describe it in detail to a colleague or friend. Try role playing by asking them to act as the technical expert and request that she ask you to clarify anything she does not understand so you can refine your pitch. Through this exercise you'll be forced to develop the language and details you need to make sure a vendor or consultant knows exactly what you are looking for.

Instead of simply saying "we need a database" you might find yourself saying something like, "We need to get our information systems in order. One part of this effort is connecting data on donors and volunteers in a way that allows us to see which donors are also volunteer and vice-versa. We need this new system to help us see the exact number of donors we have at any moment and how they break out by donation level. How many donors do we have that give 10-20 dollars? How many give 20-50 dollars? Who are our highest donors?" This type of detail will trigger the person you might work with to ask a set of additional questions to help you clarify the scope of the project.

Consider writing a Request for Proposals (RFP), a written articulation of in the results you expect from a volunteer, consultant or vendor's work. Even if you are not going to use the RFP when hiring a volunteer or consultant, forcing yourself to write things out will help you clarify what you want. There is no single correct format for an RFP, but you will want to address

issues such as: What you need; why you need it, what resources you have to put towards it (human and financial), when you need it by, etc. Challenge yourself to answer questions such as - are you trying to automate an information or communications process that currently exists or are you creating a new process? Who needs to work with the new technology? What existing technology does the new project need to be compatible with? What kind of staffing/support might you need to maintain this project over time?

Think about HOW you want to work. Who in the organization needs to be involved in the project? Do you need someone who can research solutions or provide one? Do you need someone to help facilitate your organization's decision making or someone who can tell you what you should do? Do you need someone who will take the ball and run with it, returning in 6 months with a final product, or do you want someone to update you twice a day on the project's status?

When you are ready to choose a consultant or volunteer to undertake your project, balance telling the prospective consultant about the project with interviewing the consultant. In a simulation during the Readiness program, the Executive Directors learned that they were prone to spend the majority of the time in our "mock interview" describing the project rather than interviewing the consultant about his/her experience and expertise. While they had a sense of whether or not they liked the "consultant," and whether or not the consultant asked good questions, when the "interview" ended, the "client" did not know whether or not the consultant was CAPABLE of doing the project.

Interview more than one volunteer, consultant, vendor, and check references!
Volunteerism is a major part of the lifeblood of nonprofit success. Organizations that are able to attract and successfully manage volunteers, as well as consultants and vendors, have the ability to ramp up their capacity without incurring the cost and responsibility of staffing for every need. Nonprofit executives should remember to apply disciplined management techniques to selecting and overseeing outside help in any form. What we learned in the work we did with this group of Executive Directors is "slow down, understand what you want, and make sure you know how much oversight is needed on your part to make the outsourcing solution work for you and your organization."

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