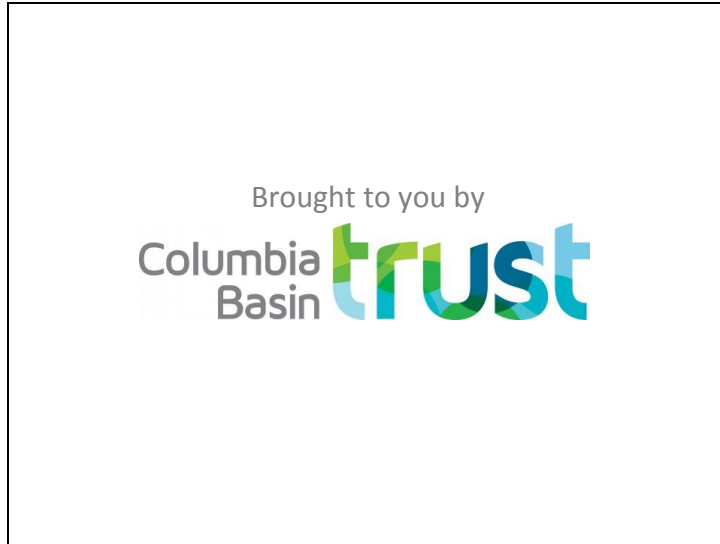


Slide 1



Hello and welcome to this e-learning session on Volunteer Engagement, brought to you by Columbia Basin Trust and presented by Vantage Point.

Slide 2



Slide 3



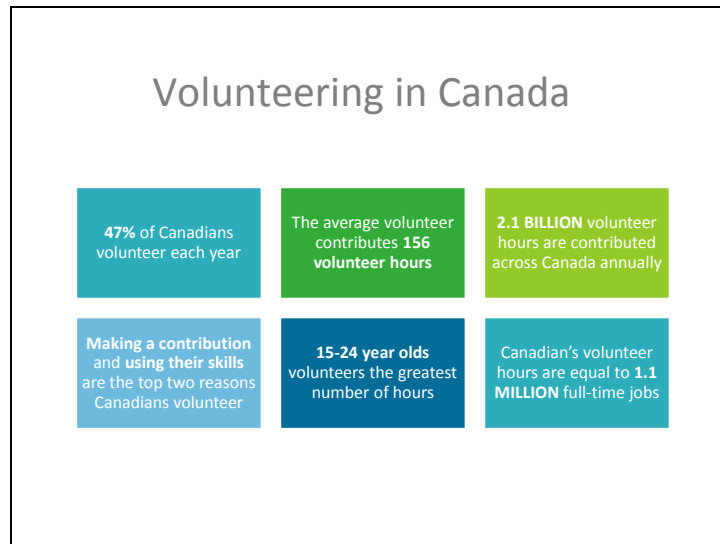
My name is Carol Neuman and I'm the Director of Learning at Vantage Point. Vantage Point is a not-for-profit organization that supports other not-for-profits by providing foundational, advanced, and online learning opportunities. We work with more than 500 organizations and nearly 3000 not-for-profit leaders across BC.

Today, I'll be your e-learning facilitator, sharing some best practices and tools engage volunteers in delivering your mission.



In these modules, we will explore practices that support the successful engagement of volunteers, including skilled knowledge philanthropists – a term we will define a little later on – and learn how to proactively plan for, attract, and engage volunteers in your work.

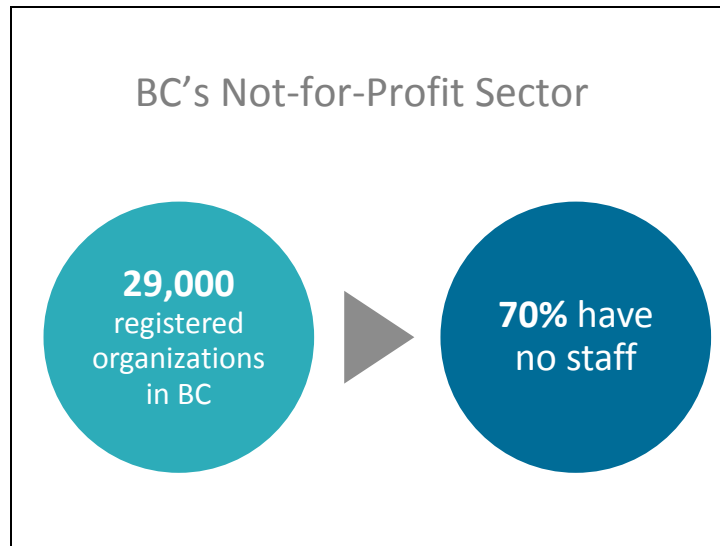
Let's get started!



Here's a brief snapshot of volunteering in Canada.

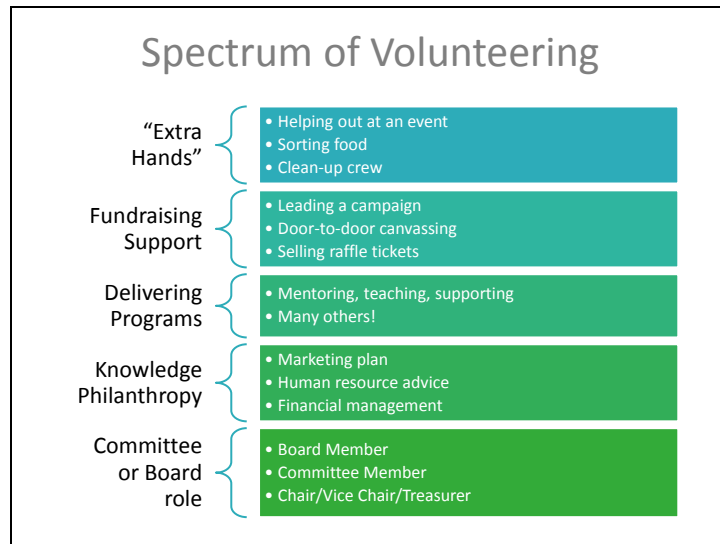
It might surprise you to know that:

- 47% of Canadians volunteer each year. Nearly half the people in this country volunteer their time and talent to organizations. And despite a perception that this is declining, the reality is the proportion of volunteering has held steady for the last decade.
- The average volunteer contributes 156 volunteer hours per year.
- In total, more than 2.1 BILLION – and yes that's Billion with a B – volunteer hours are contributed across Canada annually.
- Why do Canadians volunteer? Well there are a mix of reasons. But the top two reasons people share are to make a contribution to the mission or cause they are passionate about, and to use their skills.
- Despite common perceptions, 15-24 year olds are the age group that volunteers the greatest number of hours.
- And in total, Canadian's volunteer hours are equal to 1.1 MILLION full-time jobs.



The BC not-for-profit sector is surprisingly large, and when asked most people would guess that there are 5,000 organizations in the province. In fact, BC has over 29,000 registered not-for-profit and charitable organizations.

And another surprising statistic— more than half of these organizations have no paid staff. This means that the organization is completely run by the board of directors and volunteers. Volunteers are a critical resource for not-for-profit organizations and their time and talent are heavily relied upon.



There are so many ways that volunteers contribute to organizations and communities. So, let's spend some time and walk through the spectrum of volunteer opportunities. For each type, I'll provide a brief description, look at what is expected from the volunteer, and the depth of relationship it will create between the volunteer and your organization.

- "Extra Hands" volunteering includes roles where someone might be helping to make sure an event runs smoothly or sorting or sharing out food at a food bank or soup kitchen. Extra Hands roles can be related to a one-off, short-term event, or may be ongoing, with a regular weekly or monthly commitment. These roles tend to be quite flexible, working around the available time a volunteer has.
- Fundraising support roles include someone being their office 'captain' for a fundraising drive, doing door-to-door canvassing or selling raffle tickets. Fundraising support roles are often campaign-based, which means they last for a particular time period, from weeks to months. There is some flexibility in the time commitment for these types of roles.
- Volunteer roles involved in delivering programs will vary greatly depending on the type of programs a particular organization offers. It could be facilitating a workshop, which is how Vantage Point engages many of our volunteers. Other volunteer roles could be mentoring young people, socializing with seniors, or walking dogs at a pet shelter. The opportunities here are truly endless! In delivering programs, the roles tend to be more ongoing with a higher degree of structure and potential for developing a deeper relationship with the organization and those community members it serves.

- The next layer in the spectrum of volunteering is what we call “knowledge philanthropy”. These are roles that will leverage a volunteer’s specific skills in support of the management or operations of the organization. Some examples of knowledge philanthropy roles include writing a marketing plan, providing human resource expertise to an Executive Director, or managing a major IT project. Again, there are many possibilities depending on the skills and experience a volunteer wants to contribute and where the organization can use more support. Knowledge philanthropy roles are usually project-specific, with structured goals and specific timelines and deadlines. We’ll talk about this type of volunteering in more detail in a few moments.
- Finally, there are board and committee roles, as well as a leadership or Officer role within a board or committee - either Chair, Vice-Chair, Treasurer, or Secretary. Board and Committee roles tend to require the longest time commitment with the most structure. The pay-off, however, is that these volunteers truly develop a deep and meaningful relationship with the organization – playing a key role in its mission accomplishments.



Let's explore knowledge philanthropy. We want to define knowledge philanthropy by talking about the differences between traditional volunteers, board members, and knowledge philanthropists. With traditional volunteer roles, such as the "extra hands" at an event or providing fundraising support, the roles are general meaning many people can fill a particular role. These roles don't necessarily require a very specific set of skills or experience.

Board roles, on the other hand, will be more specific to a person's skills, network, or experience. Board roles tend to be quite long-term with a deeper commitment to the organization.

Knowledge philanthropists, in contrast, contribute to unique roles in a time-bound or project-specific way.

Typically, knowledge philanthropists are those volunteers who:

- Are not content to perform traditional, repetitive tasks;
- Are very busy and want to make a difference without getting pulled into a regular, ongoing role;
- Are looking for project-based, high impact roles;
- Are looking for something that isn't their "day job" but uses, and further develops, the skills and experience they already have.



If you are considering adding a knowledge philanthropy role to your volunteer team, here are a few things to consider:

Be aware that this is a pretty new way to engage volunteers and can feel unfamiliar. So, don't feel alone if you find that making the move towards more delegation and involving knowledge philanthropists in delivering mission and programs can be hard! If you're approached by a potential knowledge philanthropist about becoming involved, work with them to identify what you both care about, and structure a role based on what will work for you, as well as for them.

A few other things to consider for a knowledge philanthropy role to be successful:

- First, you should ask a volunteer to commit, and be accountable for, specific deliverables or outputs so you both know what success looks like.
- Second, it's definitely a good idea to ensure the role is different in some meaningful way from their regular work. Even if the role draws on their current skills and expertise, ideally there is some specific learning or new experience for the knowledge philanthropist.
- Third, make sure both you and the knowledge philanthropist understand the connection between the role they can play and the impact on the work, or mission, of your organization. This will support them in feeling they have made a meaningful contribution.
- Finally, look for ways that the volunteer role is truly a win-win, resulting in a positive experience for both your organization and the volunteer.



So, what does knowledge philanthropy look like in real life? On the slide are some concrete examples of knowledge philanthropy roles that Vantage Point and many of our not-for-profit members have actually recruited for: program evaluator, recruitment advisor, software expert, grant writer, photographer, social media expert, and HR policy developer.

And to bring this even more to life, here's a quick case study from a Vancouver-based organization called the Health Initiative for Men.

The Health Initiative for Men was part-way through the process for applying for charitable status when the application stalled. According to Wayne Robert, the Executive Director at the time, "Staff were focused on delivering programs. Organizing and updating the required documents and policies was always something on the backburner."

So when Kevin, a lawyer interested in becoming a board member, approached the organization, Wayne asked if he would consider taking a look at their charitable status application for Revenue Canada. Although Kevin was a lawyer in land titles, Wayne knew that that his strategic and critical eye would benefit the project.

Kevin ended up contributing more than his critical eye to the project - he wrote the whole report for the organization's submission to Revenue Canada. Kevin felt that the volunteer project was very satisfying – like putting together a complex puzzle. It used his skills as a lawyer, but was a project he would not have the opportunity to lead at work.

Kevin organized numerous documents and identified policies that had to be created or updated to meet Revenue Canada requirements. He worked with individual staff and board members to complete and approve the updates, then drafted a report that was submitted to an expert charity lawyer for final review before going to Revenue Canada. The cost for legal fees was minimal compared to what it would have been if Kevin hadn't put their house in order first.

The end result? The Health Initiative for Men now has official charitable status.

What Is Volunteer Engagement?

Volunteer engagement is an **organization-wide strategy** designed to build capacity by **involving volunteers** in the area of the **organization where they can make the most impact.**

Now, let's explore how to engage volunteers.

I want to acknowledge that there are many definitions of volunteer engagement. I want to share this one, developed by the Canadian Cancer Society, with you and highlight a few key elements.

Notice the bolded phrases. These are key concepts about engaging volunteers – the what and why.

- First, it is an **organization-wide strategy**. This means it is done with intention, or a clear goal in mind. It's integrated into many different parts of the organization, and it's likely not just the responsibility of one person to work with volunteers.
- Second, is about **involving volunteers** – the key word being involving. This might feel like a shift away from simply managing volunteers and towards working with them in a way that is more collaborative.
- And third, it's about identifying where volunteers can support your organization to deliver on your mission and have an impact in the community.

Successful Volunteer Engagement

Shared Beliefs	Tips for Success
<ul style="list-style-type: none">• Volunteers are critical to the success of the organization• Volunteers are capable of creating real impact in our organization• Engaging volunteers is how we connect our mission and the needs of our clients in the community	<ul style="list-style-type: none">• Find the right role for each volunteer• Encourage open communication between volunteers, staff and clients• Create opportunities for volunteers to learn and contribute• Involve volunteers in meaningful work that is connected to your core mission• Don't only count how many volunteers and their hours• Track and share the impacts of what your volunteers do

Adapted from Jennifer Bennett, VolunteerMatch

Engaging volunteers is a unique way for not-for-profit organizations to tap into the energy, time and skills of a broader community in order to deliver their programs and mission. But involving volunteers in a way that is engaging, or meaningful for the volunteer and creates impact for the organization is not always simple.

It begins with exploring some of the core beliefs organizations have about the role of volunteers. In organizations that are successful in engaging volunteers, we generally find that there is a shared belief that:

- Volunteers are critical to the success of the organization
- Volunteers are capable of creating real impact in their organization
- And that engaging volunteers is how the organization connects their mission to the needs of clients in their community.

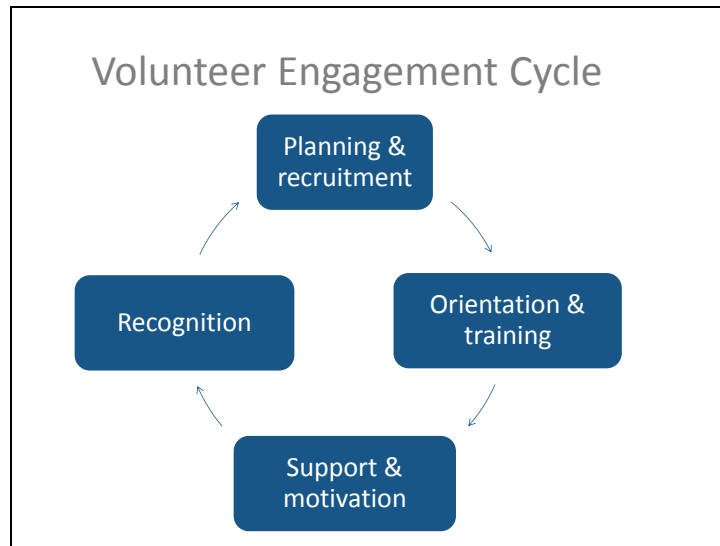
Again, it's important that these beliefs are not only the viewpoint of a few staff or board members, but shared across the organization. At your organization, you may want to have a conversation with your board or staff about this, asking:

- How does volunteer engagement fit into our organization's goals, values and beliefs?
- What goals, values and beliefs do we have around volunteer engagement?

If you find that your organization is not engaging volunteers in a way that is meaningful or creates impact, you'll want to consider what you can do to change this.

Some tips for successfully putting a volunteer engagement program in place are:

- Finding the right role for each volunteer. If you don't have the right role for someone at the moment, don't simply give someone busy work.
- Encouraging open communication between volunteers, staff and clients. It may be helpful to think about your volunteers as part of your talent team rather than outside stakeholders.
- Creating opportunities for volunteers to learn and contribute. Make sure that the volunteer role fits with the goals of that volunteer. Here, you're really looking for the win-win. What works for your organization and for your volunteers? That's the sweet spot where volunteers feel most fulfilled, and often do their best work.
- Involving volunteers in meaningful work that is connected to your core mission. This might mean some extra effort on your part explain how the volunteer's role or work plays a part in a larger picture and why it matters to your organization.
- Tracking and sharing the impacts of what your volunteers do, and not only counting the number of volunteers and their hours.



There are four stages in a successful volunteer engagement program.

It begins with a focus on planning and recruitment. In this stage, you might consider questions like: How do you want the volunteer to contribute their time, skills and energy? What specific role or project will they take on? What would success look like in this volunteer role? Who would be a great fit for accomplishing the task at hand?

Then comes orientation and training. In this stage, you will support the volunteer by introducing them to the people they will be interacting with, giving them the tools required, and providing the information that will support them to be successful in their role.

Then comes step three. As the volunteer becomes more comfortable in their role, you'll continue to provide them with support and motivation.

The final stage is recognizing the ways the volunteer has helped your organization deliver its mission.

In Part 2 of this e-learning on Volunteer Engagement, we'll look at each of these four stages in more detail.



Volunteers contribute to the not-for-profit sector in many important ways – from delivering programs, to serving on a board, to providing their time and energy, to running your day-to-day operations. Involving volunteers in ways that support you to create an impact in the community takes a clear strategy with goals that are win-win for your organization and your volunteers.



Thank you for taking part in this e-learning session. We hope you join us for Part 2.



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