2024 Nonprofit Leadership Conference

May 8, 2024
Minneapolis
2024 NONPROFIT LEADERSHIP CONFERENCE

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Turning One-Time Volunteers into Lifelong Organizational Champions

Volunteers at the Compass Twin Cities end-of-project celebration in 2023

May 8, 2024
Welcome and Introductions

Mary Uran
Managing Director - Twin Cities @ Compass Pro Bono
About Compass Pro Bono

Our Mission
Compass Pro Bono forges lasting ties between local nonprofits and local business professionals to empower thriving, equitable, resilient communities.

Our Vision
Deeply interconnected communities.

How We Deliver
Through pro bono business consulting and board matching / training for local nonprofits.
23 years of impact

- **8170** volunteer matches
- **2700** nonprofits served
- **1430** pro bono consulting projects
- **284** business leaders placed on nonprofit boards
- **$141 million** in pro bono services to local nonprofits
What we will cover today

• The basics of leveraging volunteers

• Core principles: making it easy for your volunteers to volunteer

• 5 tested strategies for working with volunteers to keep them coming back

• Making it sustainable: relationship-building and data collection

TODAY’S GOAL: you will walk away confident in how to deploy up to five tangible strategies for building a strong volunteer base, no matter what your mission is.
Getting back to the basics

1. **Positioning**
   How do your volunteers fit into your organization’s work?

2. **Capacity**
   What does it take—in terms of human and financial resources—to manage volunteers?

3. **Value Proposition**
   What’s in it for them?
Why volunteering?
Why volunteering? (the nonprofit angle)

POSITIONING: What’s the value to nonprofits?
• added capacity to make progress on mission
• automatic organizational champions / resource magnets
• potential donor pipeline

“The outside and in-depth analysis of our program gave us a new perspective on how to engage our donors and potential partners.”

“Our Compass project helped transform the entire organization.”

“There are no words to describe the value of having a group of exceptional humans dive deep into the workings of our non-profit but also the heart of our mission.”
Why volunteering? (the volunteer angle)

VALUE PROPOSITION: What’s the value to volunteers?
- opportunity to give back to community
- possibility of learning about an issue area or practicing a skill
- social and/or professional networking

“If my work on nights and weekends with Compass and the client prevents one family from being evicted, any amount of my time is more than worth it.”

“Compass has supported my professional development by allowing me to refine my project management skills.”

“On a personal level, my projects have provided me with a vehicle to learn and get closer to issues I care deeply about, like the wealth gap.”

“It has been incredibly rewarding to expand my professional network through Compass.”
Framework: The 5 Ts of Volunteer Management

Make it easy for your volunteers to volunteer, from recruitment to retention.

- Testimonials
- Trainings
- Toolkits
- Templates
- Touchpoints

Data Collection / Iterating on What Works

Relationship-Building & Communication
Volunteer Management Tool #1: Testimonials

GOALS:

- Give your existing volunteers a meaningful opportunity to reflect on their experiences with your organization
- Make your volunteering opportunity come to life for prospective volunteers
Volunteer Management Tool #1: Testimonials
## Volunteer Management Tool #1: Testimonials

Here’s our process, to get you thinking:

<table>
<thead>
<tr>
<th>Collection</th>
<th>Identification</th>
<th>Categorization</th>
<th>Publication</th>
<th>Recognition</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Collect quotes at regular points throughout the project cycle:</strong></td>
<td><strong>Sift through and select the strongest quotes at consistent times.</strong></td>
<td><strong>Create “best of” repository for quotes broken down by:</strong></td>
<td><strong>Feed best quotes into social media, emails, presentations, etc.</strong></td>
<td><strong>Tag volunteers on social media so they can share on their own!</strong></td>
</tr>
<tr>
<td>→ Mid-Project Survey</td>
<td>→ 1 week post-survey</td>
<td>→ year</td>
<td>→ always get consent</td>
<td>→ more on this later…</td>
</tr>
<tr>
<td>→ End-of-Project Survey</td>
<td>→ end of program cycle each year</td>
<td>→ city</td>
<td>→ place next to headshot</td>
<td></td>
</tr>
<tr>
<td>→ volunteer events</td>
<td></td>
<td>→ volunteer type</td>
<td>→ include volunteering details (ex. year, project)</td>
<td></td>
</tr>
<tr>
<td>→ check-in emails</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Volunteer Management Tool #2: Trainings

GOALS:

• Equip your volunteers with the knowledge they need to execute their work
• Prepare volunteers to serve as ambassadors for your organization & represent you well in the community
Volunteer Management Tool #2: Trainings

Next, if you haven’t done so already, please respond/RSVP to the following items:

- **Volunteer Orientation**
  - Wednesday, October 19, 6:30 p.m. [bit.ly/volOrientation22](https://bit.ly/volOrientation22)
- **Service Line Training**
  - Thursday, October 27, 6:30-8:00 pm ET
Volunteer Management Tool #2: Trainings

Here’s our process, to get you thinking:

**Ideation**

*Brainstorm what baseline training your volunteers need.*

→ define the WHY (how did we get here, why do we need you to do this)
→ orienting them in the nonprofit world if not familiar with it, etc.

**Collection**

*Determine potential sources of training content, including:*

→ past info sessions
→ static resources
→ external trainings
→ external literature
→ tips from volunteers

**Categorization**

*Decide on the proper format and audience for each training:*

→ live vs. asynchronous
→ new vs. returning vols
→ presentations vs. interactive workshops

**Staffing**

*Create a “super-volunteer” corps to support trainings year-round:*

→ train the trainers
→ give some creative freedom/ownership
→ emphasize stories & personal experiences

**Training**

*Deliver trainings, focusing on multimodal learning & interactivity:*

→ create content for all learning styles (visual, auditory, social, etc.)
→ offer supp. resources (NonprofitReady)
Volunteer Management Tool #3: Toolkits

GOALS:

- Maintain a standing repository of resources your volunteers might need throughout their time working with your organization
- Eliminate unnecessary back-and-forth communication
Volunteer Management Tool #3: Toolkits
Volunteer Management Tool #3: Toolkits

Here’s our process, to get you thinking:

**Ideation**
- Brainstorm what tools your volunteers need in order to do the work well.
  - → define the WHY
  - → orienting them in the nonprofit world if not familiar with it, etc.
  - → can include reference training recordings!

**Maintenance**
- Appoint staff to maintain toolkits throughout programs.
  - → update resources
  - → add help text
  - → revise resource names for clarity
  - → reorganize as needed

**Keeping it Fresh...**
- Revisit toolkits content every program cycle to assess its relevance.
  - → nix outdated content
  - → flag underutilized resources
  - → add in new tools based on new needs

**...Relevant...**
- Check in with volunteers about their use of toolkits.
  - → focus on HOW and WHEN they’re using the resources
  - → let volunteer needs inform the tool, not the other way around

**...and Front & Center**
- Proactively tell volunteers what tools can help them & when.
  - → guide volunteers toward resources that may come in handy
  - → habituate turning to toolkits before coming to you w/ Qs
Volunteer Management Tool #4: Templates

GOALS:

• Make it easy for your volunteers to do their work
• Make it easy for your volunteers to SHARE WITH OTHERS about their work
Volunteer Management Tool #4: Templates

Social Media Toolkit
Volunteers

By sharing the fantastic work you're doing for our community, you can (1) inspire others, and (2) help us recruit more talented volunteers like yourself:

- Follow Compass Pro Bono on LinkedIn
- Add Compass to the volunteer section of your LinkedIn profile
- Post about your experiences on the following sites

Please contact Shannon Rinehart at ShannonRinehart@compassprobono.org with any questions.
Compass Pro Bono, registered 501(c)(3), EIN: 23-3219082

Sample Captions

Collect a story that I've shared with a professional consulting firm for [local name]. I've been invited to visit their offices to volunteer my professional skills to support and engage with our community. Stay tuned for updates!

It's not too late to get involved! Check out Compass' volunteer opportunities here: [insert the link here]

I hope you'll consider applying. Message me if you have any questions or if you'd like to learn more about my volunteer experiences.

Until then, I'm thrilled to share an awesome volunteering opportunity I've been part of with Compass Pro Bono. After being selected to serve as a volunteer for Compass Pro Bono, I matched me with the nonprofit, [name], to conduct an eight-month strategic consulting project. I'm excited to be able to apply my professional skills to help them serve our community and make a difference.

Message me if you have any questions or if you'd like to learn more about my Compass Pro Bono volunteer experience.

Use these captions for inspiration or post them as-is!

Please be sure to tag us: @CompassProBono

*Bonus* Sample Email Language
Know someone who would make a great volunteer? Please help us reach them!

Subject: Sharing a unique volunteer opportunity
Hi [Name],

I wanted to share something I think you'd enjoy. I'm volunteering with [organization name] as an organization called [Compass Pro Bono], whose mission is to bridge the gap between social entrepreneurs and business leaders.

Their flagship program, [Project Name], provides strategic consulting services to local nonprofits (free of charge) by leveraging the skills of local business professionals - and I thought of you! It's a really unique model. Compass works with nonprofits to design and execute best-in-class strategic and fundraising projects. Then they recruit local professionals to join teams to support a nonprofit based on their skills and interests. Projects begin in late January and last four months.

Give your clients and friends, I think you'd really get a lot out of it and really enjoy the experience! The volunteer application is now open; you can learn more here: [link to the application]

Best of all, let me know if you have any questions. I'd be more than happy to share about my experience.

[your name]
**Volunteer Management Tool #4: Templates**

Here’s our process, to get you thinking:

<table>
<thead>
<tr>
<th>Ideation</th>
<th>Maintenance</th>
<th>Templatification</th>
<th>Distribution</th>
<th>Promotion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish language that captures your mission + how volunteers fit into it.</td>
<td>Adapt the language so it speaks from the volunteers’ POV.</td>
<td>Create templates that make it EASY for volunteers to share.</td>
<td>Share templates with a specific ask + clear guidance on usage.</td>
<td>Boost volunteers’ social media posts whenever you can. It’s a win-win:</td>
</tr>
<tr>
<td>→ think about your value proposition for volunteers</td>
<td>→ if you need help, ask some volunteers why they volunteer with your org and use their answers as inspiration</td>
<td>→ social media, email, text, word of mouth...</td>
<td>→ attach your ask to a specific campaign/time frame to motivate them</td>
<td>→ helps them reach a wider audience</td>
</tr>
<tr>
<td>→ avoid jargon</td>
<td>→ focus on simple and powerful language</td>
<td>→ allow space for personalization (e.g., for volunteers to share their own stories)</td>
<td>→ remind volunteers how important word-of-mouth support can be for mission</td>
<td>→ fosters sense of connectedness to org</td>
</tr>
<tr>
<td>→ prioritize strong language that speaks to emotions, not logic</td>
<td>→ allow space for personalization (e.g., for volunteers to share their own stories)</td>
<td></td>
<td></td>
<td>→ adds personal touch to your marketing</td>
</tr>
</tbody>
</table>
Volunteer Management Tool #5: Touchpoints

GOALS:

• Create consistent opportunities for bidirectional feedback with volunteers
• Establish “culture of communication” & warm touch with volunteers before, during, and after their service
Volunteer Management Tool #5: Touchpoints
Volunteer Management Tool #5: Touchpoints

Here’s our process, to get you thinking:

**Design**

*Brainstorm WHEN and HOW you can connect with volunteers.*

→ what touchpoints would be most helpful for your organization?
→ what touchpoints would be most helpful for your volunteers?

**Placement**

*Schedule surveys, events, roundtables, etc. at those junctures.*

→ give plenty of notice to expected attendees
→ consider making attendance required
→ budget for no-shows & always have a Plan B

**Engagement**

*Engage volunteers with each other to discuss their experiences.*

→ work to foster a sense of community
→ create opportunities for mutual support + encourage idea-sharing
→ allow time for networking!

**Impact (Live)**

*Communicate your volunteers’ impact throughout their work.*

→ keep them motivated to push through to the end
→ share direct quotes from beneficiaries

**Impact (Long-Term)**

*Communicate your volunteers’ impact after their work ends.*

→ help them see the impact of their efforts so they’ll stay engaged
→ share direct quotes and impact metrics from beneficiaries
Foundations: Relationships & Communication
Making it Sustainable with Data

Survey Results: Project Leaders

- PLs are finding the experience valuable and feel the projects are on track and high quality
- PLs have strong teams, some TM engagement varies
- PLs have a responsive client and have developed strong rapport
The 5 Ts of Volunteer Management

Make it easy for your volunteers to volunteer, from recruitment to retention.

- Testimonials
- Trainings
- Toolkits
- Templates
- Touchpoints

Data Collection / Iterating on What Works

Relationship-Building & Communication
Getting creative to activate volunteer skill sets

What motivates our volunteers to work with us? What excites them?  
How might we tap into those desires to build new opportunities?

1. Desire to engage with local nonprofits  
   Client Selection Committee

2. Desire to use business skills for good  
   Service Line Trainers

3. Desire to network with professionals from different industries  
   On Track Project Advisors

This all requires knowing your volunteers’ WHY. (Which means talking to them.)
One more resource for you…

**NonprofitReady** - modules we provide to our volunteers with an abundance of insights about the nonprofit sector and how nonprofit organizations start, grow, and operate day-to-day
Questions?

Mary Uran
Managing Director - Twin Cities
Compass Pro Bono

Want to talk more?
Interested in working with Compass?
Curious to engage Compass in your community?

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@CompassProBono