

Plan the Work and Work the Plan: Volunteer Engagement Strategic Planning

Society for Healthcare
Volunteer Leaders

April 2018



Beth Steinhorn, President



Connect with me at:



[linkedin.com/in/BethSteinhorn](https://www.linkedin.com/in/BethSteinhorn)



[facebook.com/VQVolunteerStrategies](https://www.facebook.com/VQVolunteerStrategies)



[@VQStrategies](https://twitter.com/VQStrategies)

[VQStrategies.com](https://www.VQStrategies.com)





WELCOME

Committing to Volunteer Engagement as an Organizational Strategy

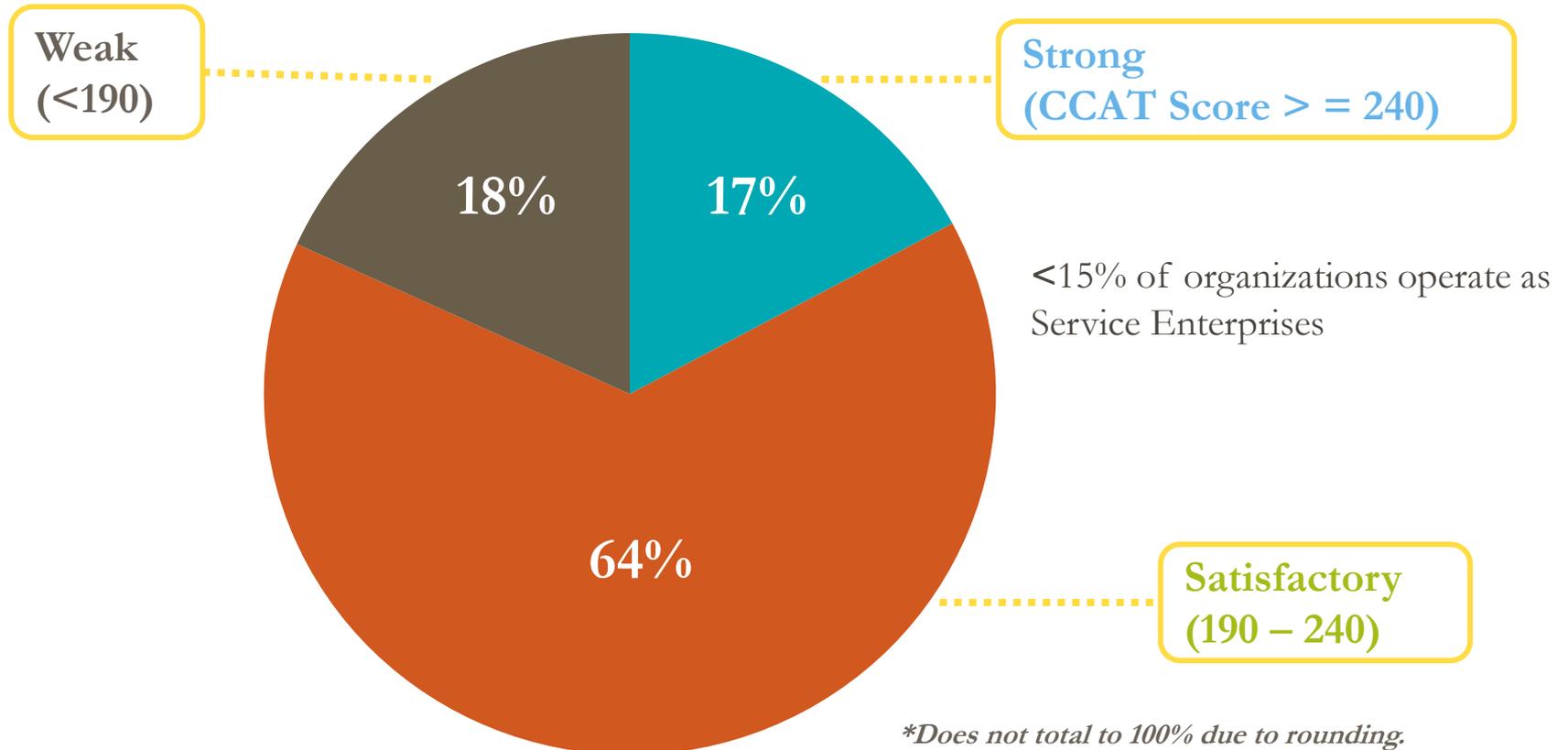


Service Enterprise

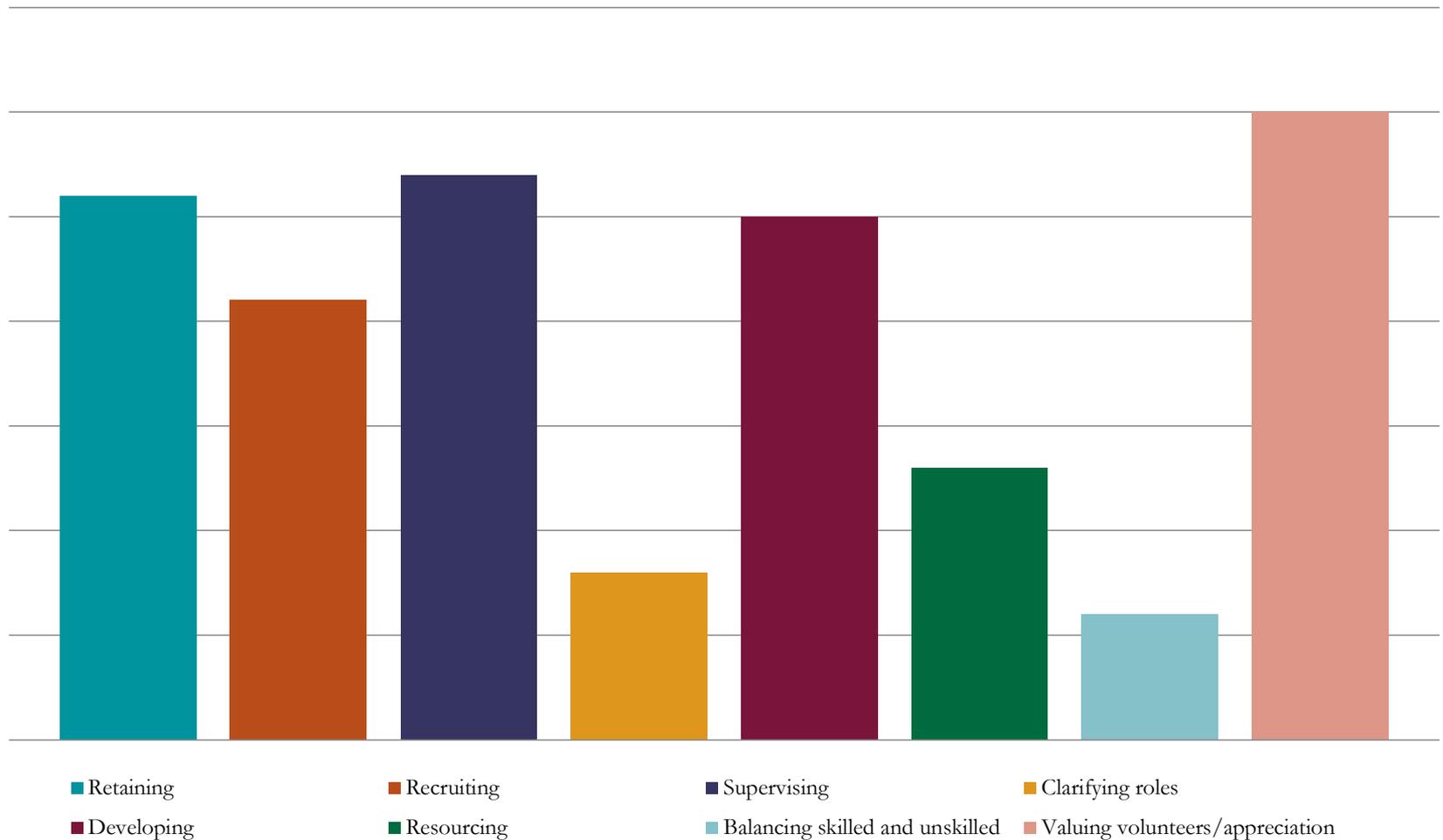
*An organization
that fundamentally
leverages volunteers and
their skills to achieve its
social mission*

2009 Research

% of Nonprofits by CCAT Volunteer Management Score Category



Volunteer Management Practices



Key Findings

All organizational capacities are **significantly and markedly stronger** for nonprofits with a strong volunteer management model.

When organizations **engage and manage any number of volunteers well**, they are significantly better led and managed.

Service Enterprises not only lead and manage better, they are significantly more **adaptable, sustainable and capable of going to scale**.

Operating as a Service Enterprise requires strong and well-developed **human resources management practices**.

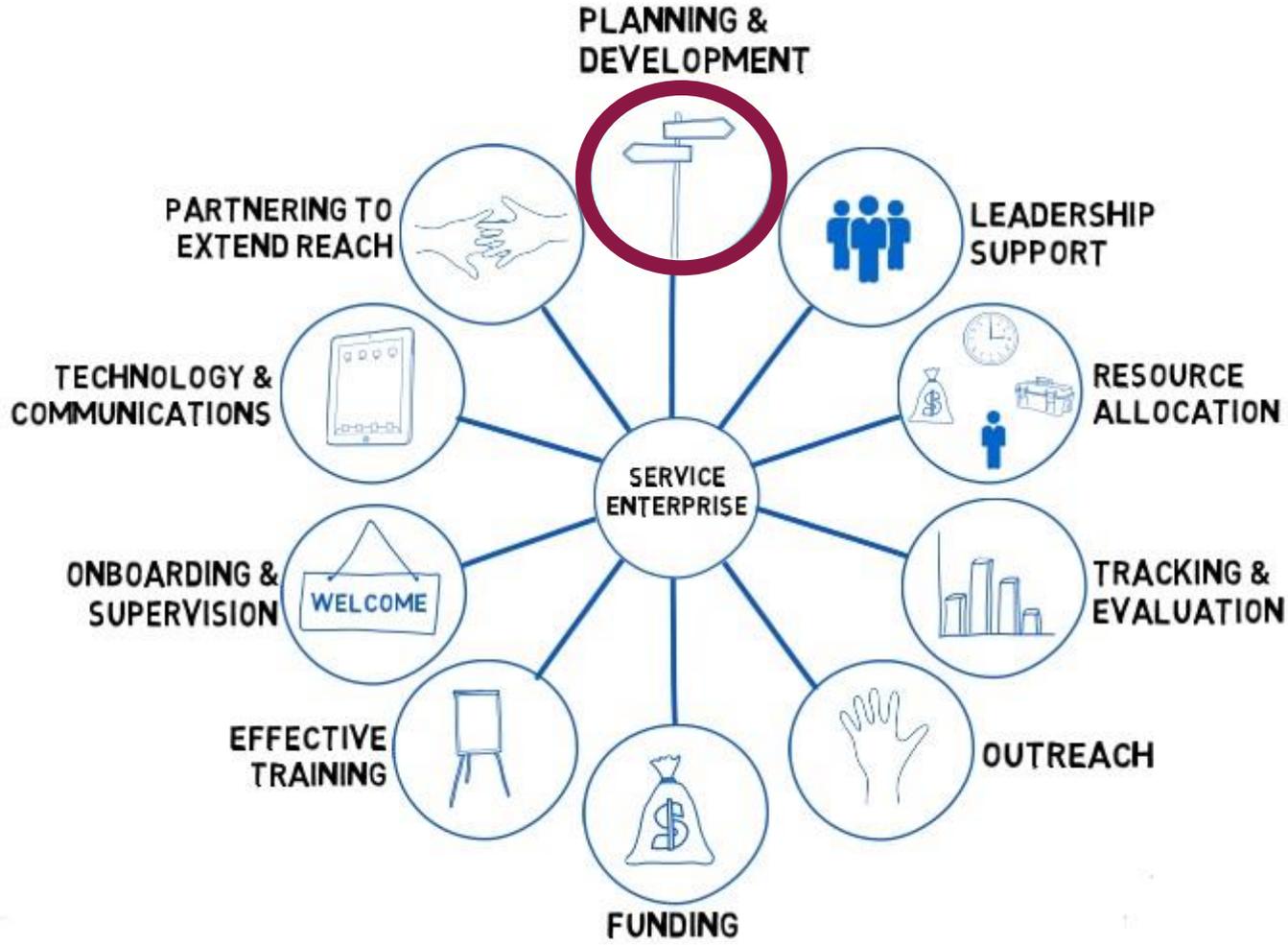
Organizations that engage volunteers are equally as effective as their peers without volunteers, but at **almost half the median budget**.

2016 Impact Study

An average SE certified organization received:

- 23% increase in volunteers annually
- 2,700 more hours of donated time from the new volunteers, equivalent to 1.5 FTEs worth of labor
- \$63K in valued labor from the additional volunteer hours

Service Enterprise Characteristics



Strategic Planning



Make a commitment to:

Allocate appropriate resources

Invest in change over time

Model engagement

Integrate volunteer engagement into brand and marketing

Provide support to staff to learn volunteer engagement

Hold staff accountable for volunteer engagement

Conduct an environmental scan to determine perception and the opportunity for change

Evaluate scalability and sustainability



Why
develop a
strategic
plan?



Why Develop a Volunteer Engagement Plan?

- Organization-wide Strategic Plan
- Mergers
- Recognized Volunteer Landscape is Changing
- Better Leverage Volunteer Talent



Foundation of Engagement



Strategic Plan

Strategic planning is a process to:

- Define organizational direction and strategy
- Ensure shared vision
- Make decisions on resource allocation to pursue this strategy

Strategic Plan

Volunteer
Management
as program



Volunteer
Engagement
as Strategy

What's Your VQ?

Organizational Commitment to Volunteer Engagement

VQ Volunteer Strategies © 2018	Almost Always (3)	Sometimes (2)	Not Yet (1)	I Don't Know (0)
Volunteer engagement is explicitly included in our strategic plan				
We have a strategic plan for volunteer engagement.				
Our senior leadership actively talks about volunteer engagement when discussing organizational goals and strategy.				
Volunteer engagement professionals (coordinators, managers, directors) are represented on the senior management team and in cross-divisional meetings.				
Volunteer engagement is incorporated into staff position descriptions at all levels of the organization.				

Aha Moments



Strategic Plan Process

What is in it for you?

- Elevate your current practice
- Engage volunteers more meaningfully
- Reduce staff fatigue
- Achieve mission
- It is do-able

Strategic Plan Process

J. W. Sefton Foundation
Customer Service Center

Assessment

Cross-
Divisional
Retreat

Finalizing Plan

Implementation

To ensure the well-being of animals, prevent cruelty to animals
to balance the human-animal bond.

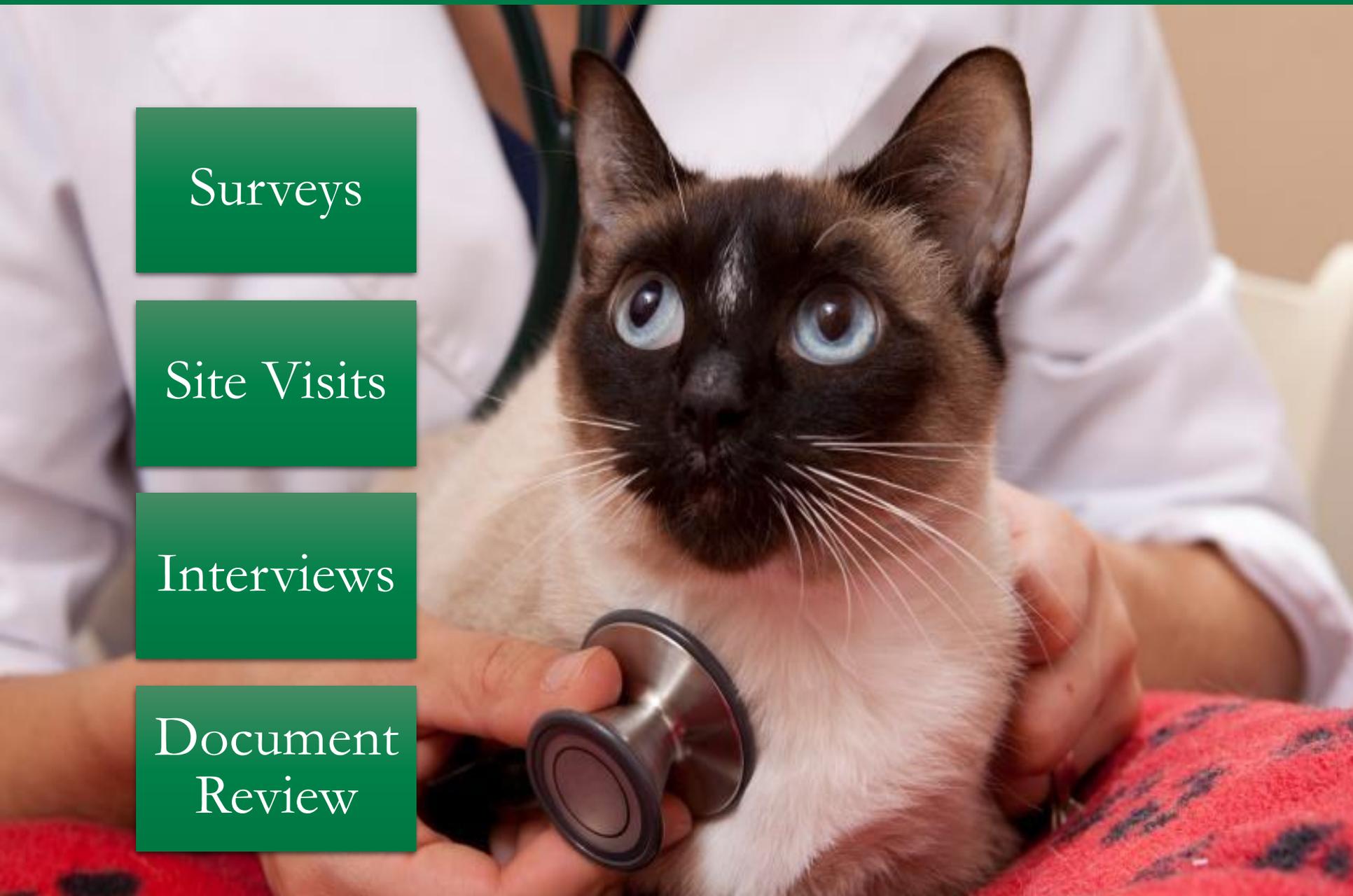
Assessment

Surveys

Site Visits

Interviews

Document
Review



What did we hear and learn?

The organizational culture is to not say “no” to each other, to volunteers. Saying “yes” is a big thing.

There is lots of staff time spent keeping volunteers busy and that wasn't saving staff time.

Even when I work 110%, it's not enough. I can't do even the basic level, let alone reflect.

I would like to see all campuses function the same way...I would like the same rules that apply there to apply here so that you can walk into a campus and do the same thing.

Seeing all these mergers and the importance of getting to our goals, volunteers are a huge asset to get us there.

Assessment: Take-Home Tips

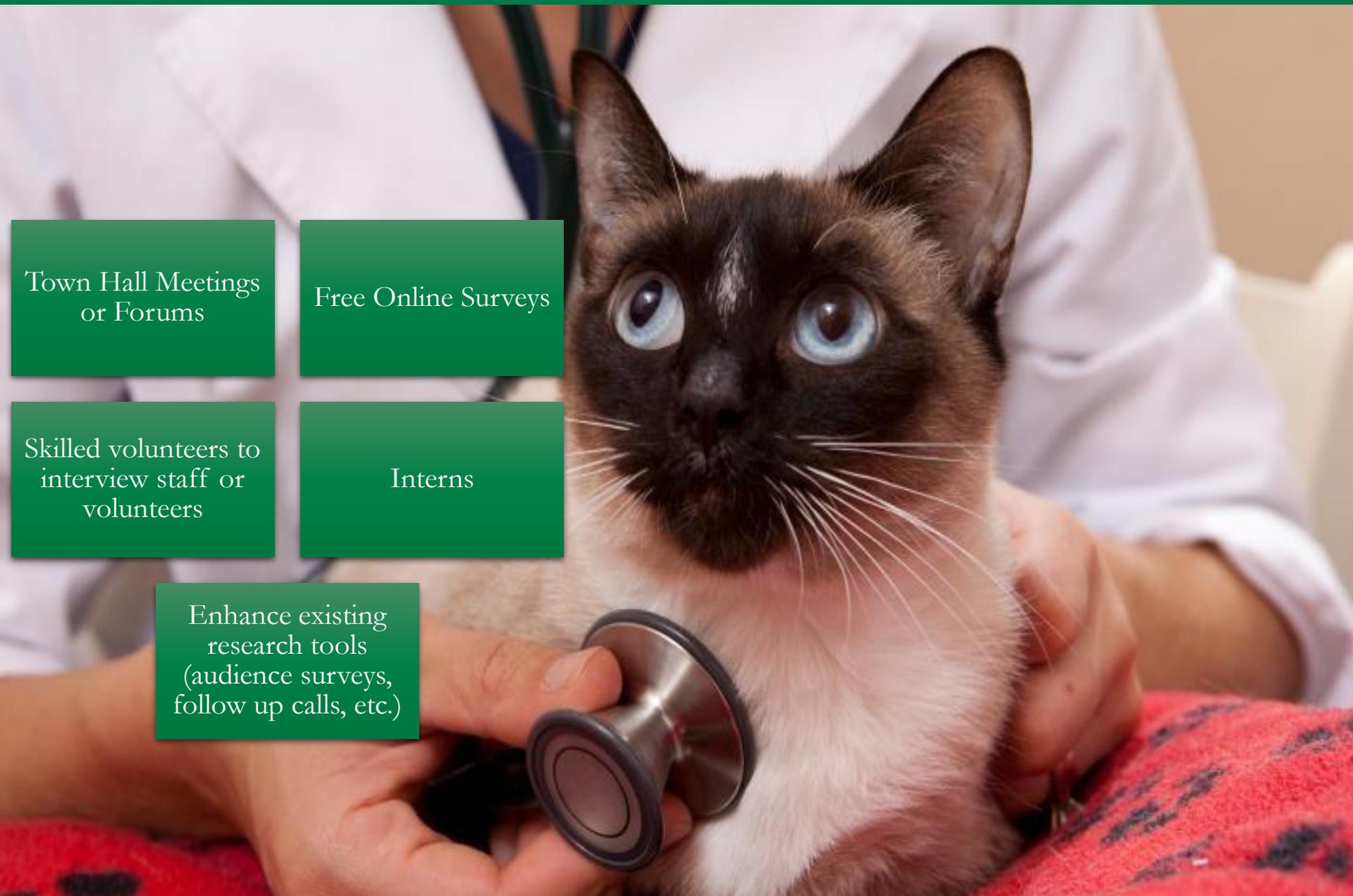
Town Hall Meetings
or Forums

Free Online Surveys

Skilled volunteers to
interview staff or
volunteers

Interns

Enhance existing
research tools
(audience surveys,
follow up calls, etc.)



Cross Divisional Retreat

A group of business professionals, including a woman with glasses and a man on a phone, are gathered around a table, looking at documents and discussing them. The scene is set in a professional office environment.

Shared
results

Vision

Values

Critical
Issues

Retreat: Take-Home Tips



Dedicate a day

Get the right people around the table

Engage a dedicated facilitator

Develop an aspirational and realistic agenda

Be clear on everyone's role

Follow up and share next steps and results

Finalizing the Plan



San Diego
Humane
SOCIETY
INSPIRE COMPASSION

Volunteer Engagement Strategic Plan 2015-2017



San Diego
Humane
SOCIETY
INSPIRE COMPASSION

Volunteer Engagement Strategic Plan 2015-2017

CREATION TEAM

- Beth Steinhorn, President
- Jennifer Brehler
- Ben Campos
- Heldi Coon
- Amelia Curtis, CVA
- Jessica Des Lauriers
- Geraldine D'Silva
- Judith Eisenberg, CVA
- Jennell Garza
- Kim Harris
- Morgan Hill
- Melyssa Jones
- Liz Johnson
- Lindsey Lieberman
- Jenny Ludovissy

Michelle [unclear]
Sarah Thompson

Written in
teams

Reviewed as
a whole

Submitted
for approval

Roll out!

Take-Home Tips

Your **Organization's** Volunteer Engagement Strategic Plan 2015-2017



Your **Organizat**

Volunteer Enga Strategic Plan 201

CREATION TE

Beth Steinhorn, President J
Jennifer Brehler
Ben Campos
Heldi Coon
Amelia Curtis, CVA
Jessica Des Lauriers
Geraldine D'Silva
Judith Eisenberg, CVA
Jennell Garza
Kim Harris
Morgan Hill
Melyssa Jones
Liz Johnson
Lindsey Lieberman
Jenny Ludovissy

Identify a
Leader/Coordinator

Engage Teams in
Writing Discrete
Sections

Use Google Docs or
other shared
workspaces

Develop and stick to
a timeline



San Diego Humane Society Volunteer Engagement Strategic Plan



**Vision: *Impactful service for
compassionate hearts***



Values

Support

Teamwork

Compassion

Dedication

Education

Service

Critical Issues

1. Align volunteer opportunities to mission

2. Establish best practices

3. Provide tools, resources, and strategies for success

4. Nurture connectivity and consistency across campuses/programs

Critical Issues

Develop the right opportunities that are mission and values aligned

- Review your current roles
- Ensure volunteers understand how their work contributes to mission
- Conduct a needs assessment
- Develop new roles to address needs

Critical Issues

Establish practices that are pillars of our desired culture

- Review and update marketing to attract volunteers with skills you seek
- Develop position descriptions for every role

Critical Issues

Provide Tools, Resources and Strategies for Success

- Develop training for both volunteers *and* staff
- Enhance communication
- Clarify roles

Critical Issues

Nurture Connectivity and Consistency Across Campuses and Programs

- Document processes and procedures
- Strengthen brand

Tips for Success

Get leadership buy-in

- Articulate the value and potential of volunteer engagement
- Make the plan look as professional as it is
- Connect the dots for leadership to understand fiscal impact

Make it a priority

- Put it on senior staff and board agendas
- Write volunteer engagement into staff position descriptions

Position volunteer engagement staff as leaders

- Have Director of Volunteer Engagement/Services come to senior staff meetings occasionally

Measure and share results

- Track progress
- Share successes!

Creating a Case Statement

Case Statement

- Rationale
- Needs
- Focus
- Consistency
- Promotion



Creating a Case Statement

Creating the Case Statement

- Create your own vision of what will be different
- Create a case statement
- Plan where to use the case statement
- Tell powerful stories early and often





*If you don't
have time to
plan, do you
have time to
waste?*

- Peter Turla

VQ Resources

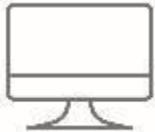
VQStrategies.com



Downloadable tools and templates



Books and tool kits



Webinars



VQ Blog



VQ Impact e-Newsletter



Thank you.

VQStrategies.com
info@VQStrategies.com

