A Handbook on Capacity Building
Volunteering
Acknowledgements

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Introduction

On November 27, 2007, the Center for Excellence in Aging Services (CEAS) Civic Engagement Reflection and Recognition Event brought together approximately one-hundred key stakeholders to explore new directions in civic engagement. More than thirty Capital Region non-for-profit organizations were represented at the event, along with various governmental agencies and foundations. Joining with them were CEAS staff and approximately twenty “leadership volunteers” from the Center’s ExcelleShare Project. As part of this event, participants were challenged to imagine the possibilities of a new paradigm where mature adults serve as leadership level volunteers to develop the capacity of organizations in the Capital Region to better serve those in need. *(For a copy of the report, see Appendix A: Civic Engagement: Recognition and Reflection.)*

A consistent theme that emerged during this discussion reflected the difficulty that many organizations were having in developing and supporting volunteer roles. *ExcelleShare* was identified as a potential intermediary to help in:

- Creating opportunities for networking and collaboration between the two groups;
- Training not-for-profit organizations on how to utilize volunteers in efficient and effective ways;
- Creating tools that more effectively match volunteer skills with organizational needs and capacity; and
- Assisting non-for-profit organizations in developing management strategies for leadership volunteers and capacity building projects.

This handbook represents the work of *ExcelleShare* and the Center for Excellence in Aging Services in meeting these assigned tasks. The handbook is divided into four sections:

- *Part I: The ExcelleShare Program* introduces the reader to the concept of capacity building volunteering and offers an overview of the services that *ExcelleShare* volunteers provide.
- *Part II: Practice Guidelines* presents practice guidelines in the form of *Lessons Learned* that illustrate how not-for-profits can effectively incorporate the capacity building expertise of volunteers and utilize this expertise in
advancing an organizational mission.

- **Part III: Next Steps** contains discussion of *ExcelleShare* and the Center’s *Civic Engagement/Volunteer Resource Center* being established for the advancement of leadership/capacity building volunteering at the systemic level.

- **Part IV: The Appendices** provide the tools and forms used to operationalize capacity building volunteering.
Part I: The ExcelleShare Program

What is ExcelleShare?

ExcelleShare is a Center for Excellence in Aging Services ("Center") program, created in 2007 to promote capacity building volunteering—i.e., volunteer opportunities that utilize highly skilled retirement aged adults to advance the community’s civic engagement agenda and improve the capacity of local not-for-profits in the Capital Region to better serve their constituencies. One of the twelve Models of Significant Service funded by the National Council on Aging (NCOA) and Atlantic Philanthropies under the Respectability Initiative (http://www.respectability.org), the stated purpose of the ExcelleShare project was to find new and effective strategies for matching participant volunteers 55+ with enriching service opportunities in our communities.

Adopting an action learning (action-reflection-action) approach to program development, the Center recruited a cadre of professional retirees to participate as co-creators of the ExcelleShare program utilizing their knowledge in defining capacity building volunteerism and the important role capacity building can play in an increasingly complex and resource deprived service delivery system. This handbook documents the dynamic exchange of ideas between ExcelleShare volunteers, Center staff, and key community partners. It provides the practice tools and techniques that emerged from the two year process of constructing the innovative volunteer program. It represents the knowledge that can be generated when highly skilled volunteers are not only permitted but encouraged to participate as full partners in the planning and program implementation processes of a not-for-profit.

What is ExcelleShare trying to accomplish?

The objectives of ExcelleShare project are to:

- Create networking opportunities and collaboration among community based organizations serving the Capital Region;
- Develop and support training tools for attracting, matching and managing volunteers;
- Prepare community partners to be ready to utilize leadership (capacity building) volunteers; and
- Support leadership level volunteers in leadership roles as they work with not-
for-profits and public agencies.

Why is the capacity building volunteering model so important?

In the face of caution, even resistance on the part of not-for-profit leaders to utilizing older adult volunteers in higher-level and potentially more demanding roles, NCOA’s RespectAbility initiative set out to test the hypothesis that there is, in fact, a compelling business case to do so. The questions driving this work included:

- Can 55+ adults in professional- and leadership-level volunteer roles contribute significantly to increasing the capacity of nonprofit organizations?
- Is the value such volunteers add to the organization worth the investment of time and money required to engage and manage them effectively?
- Are there metrics that can be used to gauge the return on investment and establish some benchmarks of effectiveness?

![Figure 1: Return on Investment MSS Projects](image)

SMART (Strategic Metrics and Results Tracking) Tool Measures

- Value of the work (BLS wage data)
- Cost of recruiting, engaging, training
- Value of the work minus cost (i.e., net benefits)
- Cost

\[
\text{Benefit/Cost Ratio} = \frac{\text{Value of the work}}{\text{Cost of recruiting, engaging, training}}
\]

\[
\text{RETURN ON INVESTMENT PERCENTAGE} = \frac{\text{Value of the work minus cost}}{\text{Cost}} \times 100
\]
To answer these questions, NCOA developed the online SMART tool (Strategic Metrics and Results Tracking). Using Bureau of Labor Statistics marketplace wage data for different jobs/roles, and comprehensive organization-entered cost data and volunteer management information, SMART provides return-on-investment (ROI) and benchmarking insights related to capitalizing on the skills of the baby boom cohort. (See Figure 1: Return on Investment—MSS Projects.)

The resounding answer to all three of the questions posed above proved to be “yes.” As a group the participants in the SMART pilot have shown that adult 55+ leadership volunteers can play a variety of critical roles that increase the capacity and impact of their organizations, that the value produced by those volunteers far exceeds the investment required to engage them, and that we can measure that value using recognized marketplace data. (For a copy of the SMART Pilot Findings, see Appendix B: Models of Significant Service Disseminator’s Guide to Strategic Metrics and Results Tracking (SMART) Findings.)

While there was considerable variation across the 44 sites participating in the SMART pilot, there is, indeed, a strong business case for utilizing 55+ adults in leadership capacities and for making the investment required to tap their skills and experience to increase the capacity of nonprofit organizations. The average (mean) ROI for the total pilot project was 792%, with a median score of 248%!

While the range of leadership/professional roles the MSS projects created for adult 55+ volunteers was quite wide, certain roles did appear in greater numbers among top quartile sites than among those that did less well on ROI—irrespective of organization size:

- Top quartile organizations engaged nearly six times as many 55+ volunteers in roles they identified as senior executives.
- Combined, top quartile sites engaged a quarterly average of over 100 adults 55+ in volunteer coordinator roles.
- Top quartile organizations engaged a significant number of volunteers in project leader/manager and fundraiser roles.
- The higher performing sites (in terms of ROI) also used many more of their volunteers in accounting roles.
Understanding Capacity Building:

In these turbulent economic times, it has become even more critical for not-for-profit organizations and public agencies to leverage assets at their disposal to meet the ever increasing demands for services. The pressure on not-for-profits and public agencies providing services such as food banks, assistance with basic needs (e.g. housing or clothing), health care, advocacy to governmental agencies, disaster relief and the remainder of services is mounting. To meet these service demands is more important than ever. Assuring that not-for-profit organizations have the infrastructure, planning, and leadership required to assure operational effectiveness is a necessity.

What is meant by “capacity building”?

Capacity building is defined as:

- The development of an organization’s core skills and capabilities, such as leadership, management, planning, program development and evaluation, in order to build the organization’s effectiveness and sustainability.
- The process of assisting an organization to identify and address issues and gain the insights, knowledge and experience needed to solve problems and implement change.
- Capacity building is facilitated through the provision of technical support activities, including coaching, training, specific technical assistance and resource networking.

What are the differences between “Capacity Building” and “Direct Service” Volunteering?

There are fundamentally two types of volunteer roles: those that provide what we think of as the traditional “direct service” and those that play a “capacity building” role.

Direct Service Volunteers

Direct Service Volunteers provide an array of important direct services to not-for-profit clients. These include such traditional volunteer placements as:

- Mentoring
Direct service volunteers remain critical to not-for-profits and other organizations particularly when volunteers work directly with consumers or clients of the agency/organization. These roles continue to be important to the day-to-day operations of service organizations of many types.

**Capacity Building Volunteers:**

Not-for-profits increasingly are looking for volunteer assistance in making their organizational system more efficient and effective in the delivery of service. Under increasing pressure to meet the growing needs of the community at a time when resources from the public sector and private funders are shrinking, not-for-profits are greatly benefitting from the skills, abilities, and knowledge of highly skilled volunteers.

As the “Baby Boomers” prepare to retire, they represent the most highly skilled and educated potential pool of retirees that has been available to serve the needs of not-for-profits and public agencies in volunteer roles. When encouraged to seek roles as *capacity building volunteers*, trends seem to indicate that these volunteers will play more of a “consultative role” than their direct service cohorts. This will encourage continued use of the groups’ professional skills as a resource to a not-for-profit or public service agency. This type of volunteer work/role seeks to impact the organization, helping to build its capacity to better serve its constituents. The role can be either project based or a longer term position. In *ExcelleShare*, these highly qualified volunteers have tended to serve as either professional level “program support” workers or as “leadership” volunteers assisting as consultants in the development of organizational infrastructure and/or organizational processes.

- **Leadership Volunteer Roles**: These generally entail short-term projects, utilizing the volunteer’s years of experience meeting such organizational needs as project management, project development, staff development and management. Specifically, leadership volunteers perform:

- Care giving – Senior Companions
- Drivers for Meals on Wheels
- Peer Leaders for Health Promotion Programs
- Ombudsmen to Nursing Home Patients
- Administrative and clerical staff support
- Staffing informational booths
Needs assessments
Strategic or business planning
Advocacy
Protocol development for the recruitment, training, and management of volunteers
Marketing and public relations, to include development of a new marketing or communications plan or a review of existing materials
Administrative tasks related to budgeting, human resources, and informational technology
Organizational management, i.e., conflict resolution, team development, problem solution, management consulting, and program evaluation
Organizational strategic development, to include facilitation of a staff and/or board strategic planning retreat or development of a work plan for program expansion
Interim Executive Directors, Board Chairs, etc.

Program Support Volunteer Roles: These placements are usually more long-term in nature, with the volunteer called on to assist with ongoing internal operations of the organization, performing such roles as:

- Website Manager
- Staff and Volunteer Trainer/Staff Mentor
- Volunteer Coordinator
- Conference Planner
- Finance/Budgeting Expert
- Grant Writer

What kind of capacity building projects have ExcelleShare volunteers been involved in?

- Working with RSVP, OASIS, and the Healthy Choices Programs within the Center for Excellence in Aging Services, ExcelleShare volunteers developed and tested the Gap Analysis and Action Planning tools that are included in this handbook. These forms can be used to guide the not-for-profit through an assessment of their organizational and volunteer needs and how to develop action plans to address identified gaps – potentially by creating new volunteer roles or enhancing existing roles. (See Appendix C: ExcelleShare Gap Analysis & Appendix D: Project Action and Work Plan.)
ExcelleShare volunteers have developed and are running a volunteer support program for volunteer “peer leaders” teaching Healthy Choices evidence based health promotion programs throughout the Capital District Region.

ExcelleShare Marketing team researched and made significant contributions to modernization of the Center for Excellence in Aging Services’ website.

Leadership volunteers developed a protocol for the recruitment, matching, and orientation of volunteers coming to the Center for Excellence in Aging Services through both RSVP and ExcelleShare. (See Appendix E: RSVP/ExcelleShare Volunteer Interview Process; Appendix F: Sharing Excellence in Volunteer Services Brochure; Appendix G: RSVP & ExcelleShare Application Form; and Appendix H: ExcelleShare Orientation Power Point.)

Leadership volunteers developed protocols for the proposal, approval, and management of short-term projects when community partners request the assistance of ExcelleShare volunteers.

ExcelleShare project teams developed a business plan for a local not-for-profit organization serving older adults with substance abuse issues.

Through a workgroup to address recruitment issues, ExcelleShare members developed an overall recruitment and marketing strategy for attracting and maintaining an ExcelleShare volunteer workforce.

Projects currently underway include:

- Development of a centralized volunteer program for a local school district
- Professional mentorship of two AmeriCorps volunteers managing a large project for a largely volunteer driven not-for-profit agency
- Development of an outcomes based program evaluation strategy for a community based volunteer service organization (See Appendix D: Project Action and Work Plan; Appendix I: ExcelleShare Project Development/Approval Procedure; Appendix J: Project Evaluation.)
Common Organization Concerns:

➢ Won’t it take a lot of my or my staff’s time to manage/supervise a Leadership or Program Support Volunteer?

   ▪ By and large, people who are Leadership or Program Support Volunteers have had many years of professional experience and need little or no supervision.

   ▪ It is important to note that if you bring in a Leadership Volunteer to work with you on a new project staff time will also be needed to support this project. One of the things you need to consider when making this decision is whether or not the potential benefits you get from the contributions of the volunteer will outweigh any loss in staff time. If this is a concern, feel free to discuss it with CEAS staff.

➢ I’m concerned about bringing in someone from the outside who does not report to me or my staff.

   ▪ How can I be assured the volunteer will respect confidentiality?

ExcelleShare volunteers coming to your organization have held executive level positions in their previous work experiences, and therefore are very sensitive to issues around confidentiality.

   ▪ How can I be assured that the volunteer will treat my staff with respect and sensitivity, especially if the problems he or she are addressing are complex or difficult ones for us?

Again, ExcelleShare volunteers have executive level experience and have learned to be sensitive to the culture of, and issues in, organizations. Also, remember—you own all of the process. The purpose of a Leadership Volunteer is not to come in and criticize your organization. Rather, the Leadership Volunteer is there to support you as you go through the process of making changes and improving your organization.
Part II: Lessons Learned from the ExcelleShare Experience

Both volunteers and service opportunities come in endless variety. The challenge is to identify and recruit volunteers who are right for the tasks, and to ensure that they are effectively utilized by not-for-profits in building organizational capacity and community infrastructure.

Guidelines for Getting Started:

In keeping with the action-learning approach endorsed by NCOA for the Respectability Project, CEAS presents the following lessons learned (or “Ah Ha Moments” as NCOA referred to them) as the major “discoveries” and “victories” of the ExcelleShare project team.

Lesson Learned: Take the time to think through your recruitment strategy and be willing to revisit recruitment practices as you move forward.

Sounding a theme of “Share*Learn*Excel*Inspire,” recruitment efforts have focused on a message of life-long learning opportunities and providing volunteers with an opportunity to give back to the community through meaningful civic engagement. To date, recruitment of leadership volunteers has primarily been through personal solicitations, advertisement at health fairs/events, advertisement in RSVP and OASIS publications, and “Orientation Events.” Recruitment efforts have tended to focus on filling identified “team based” work positions. The original list of team opportunities included the Vision Council (serving as the steering committee), Marketing and Outreach Team, Program Operations Team, and Evaluation Team. There was select rather than wholesale recruitment since it was recognized that new recruits would not “wait around” until someone had something for them to do. As such, recruitment was very purposive and occurred to some extent as “jobs” opened up.

Organizations utilizing capacity building volunteers should expect some attrition due to health and other family/work obligations. At the Center, the increase in the number of projects from community non-for-profits has required revisiting and reworking the recruitment approach. Additional strategies include opportunistic recruitment when conducting community based projects, continued solicitation through the organization’s publications, and one-on-one solicitation. Personal contact and invitation by other leadership volunteers has been the most successful approach.
Remember:

- To reach potential leadership volunteers, interview your successful volunteer recruitments and identify what worked. Process evaluation with scheduled check-ins with your volunteers, also helps to identify what is working and not working as far as recruiting and developing good candidates.

- Attract people who may not relate to traditional concepts of volunteering but are interested in applying their skills in new ways and/or learning new skills. In May 2008, leadership volunteers and CEAS staff held a highly successful workshop entitled *Getting the Most out of Volunteering*, in which 26 participants engaged with ExcelleShare volunteers in a directed exercise to think outside the box of traditional volunteerism. Such events offer opportunities for specialized recruitment. *(See Appendix K: Make the Connection...Volunteer!)*

**Missteps to avoid:** Large scale recruitment can be detrimental to the success of the program if attention is not paid to the qualifications of the individual, their willingness to work in a team environment, and what role/position they are willing to play in the project. Lack of clearly defined options/roles/project term limits from which candidates can choose can lead to problems in retention.

Key recruitment tools that can help in the recruitment process:

- Appendix F: Sharing Excellence in Volunteer Services Brochure
- Appendix G: RSVP & ExcelleShare Application Form

**Lesson Learned: Screen your candidates carefully and then provide a great orientation.**

For *ExcelleShare*, screening of candidates has been primarily through a structured interview process aimed at identifying the volunteer’s previous experience and expertise, and what role/position they might want to play in one of *ExcelleShare*’s projects. For the initial *ExcelleShare* recruits, orientation consisted of a short presentation on the goals/objectives of *ExcelleShare* and how the new program would fit with the other CEAS programs. Training of leadership volunteers was essentially “on
the job,” with full integration of the volunteer into the program via their placement on a team.

Key strategies for screening included:

- Review the candidate’s application and resume of previous training and work experience to determine their fit with the organization or a given project;
- Interview the leadership volunteer candidate to determine their “work” preferences;
- Provide an orientation that includes a review of materials relating to the organization’s mission, policies, procedures, practices, accomplishments, current projects, communication and reporting requirements;
- Encourage additional learning re leadership volunteering in such areas as: leadership practices, teamwork, program evaluation, organizational environment, and evidence based practices;
- Include leadership volunteers in staff development training and staff meetings/events/retreats.

**Missteps to avoid:**

- Exclusion of new leadership volunteers in the informal life of the organization maintains the traditional segregation of volunteers from staff. This generally serves to limit the utility of leadership volunteers to staff.
- Not clearly defining the role (or roles) of the new leadership volunteer may result in the loss of the candidate due to inactivity.

Key volunteer screening and orientation tools include:

- *Appendix E: RSVP/ExcelleShare Volunteer Interview Process*
- *Appendix G: RSVP & ExcelleShare Application Form*
- *Appendix H: ExcelleShare Orientation Power Point*
Lesson Learned: Look at your leadership volunteers as being valuable resources and possessing the expertise to help your organization grow and mature.

The leadership level volunteers have played a role in each of the Center’s major projects since they became working partners in the organization. When volunteers were not directly involved in the planning, implementation, or evaluation of a project, they were involved in providing feedback and offered an objective point of view. Specifically, the volunteers have contributed to:

- rewriting our mission statement;
- redesigning our website and marketing materials; and
- creating a capacity assessment regarding the use of our own volunteers.

Their efforts have greatly contributed to expanding the capacity of the Center. Going forward, we plan for our volunteers to serve as program ambassadors between the Center and our community partners, which will help to increase both our capacity and fundable opportunities. In addition, they will play a vital role in the creation of a Civic Engagement Resource Center that is addressed in Part IV: Next Steps of this handbook.

Lesson Learned: Expect changes in the organizational culture; prepare your staff for it.

Professional volunteers have a recognized presence in an organization. Our volunteers were instrumental in providing an objective view of our organizational culture. This new perspective coupled with the need to respond to pressing economic conditions facilitated a systematic review of organizational goals and eventually to a revision of our Mission Statement. Our ExcelleShare Vision Council Executive was a key player in the management of this process with staff.

Apart from developing a volunteer experience worthy of the MSS title, we really did not have any expectations in terms of process or product. Therefore, we employed an organic developmental approach and worked with the volunteers to co-create the program; we feel that our expectations were met and exceeded.

Because leadership volunteers recruited for the ExcelleShare project were highly skilled and received management attention, they were initially viewed by some staff as competitors. Fears and doubts, however, quickly dissipated as staff recognized the
willingness of the leadership volunteers recruited for the project. Volunteers were team members bringing needed expertise to workgroups with a great willingness to work toward achieving the organization’s mission. Because volunteers were almost always present and were encouraged to participate in staff meetings and events, staff suspicions quickly faded. This was noted by the first ExcelleShare Vision Council Executive, who claimed he knew the program was a success when persons just joining the meeting had to ask who was a volunteer and who was staff.

**Lesson Learned: Take the time to establish expectations, not only with leadership volunteer recruits, but your staff.**

The Center recognized the importance of having a cohesive message and a shared vision of the more concrete aspects of project implementation (i.e., roles for volunteers, staff, etc.). Different parties had different expectations about the effect of having leadership level volunteers in the organization, and a more unified vision initially may have helped to move the project forward more quickly. That said, taking an organic approach supported a higher level of investment for staff and for volunteers. By openly struggling with some of the questions related to integration of leadership volunteers, inevitably, the staff and volunteers came to respect the contributions of each to the whole.

Successful performance management was accomplished in ExcelleShare due to:

- Priority given to matching leadership volunteer qualifications and preferences with a specific roles and/or jobs;
- Establishing teams and team charters that outlined goals and expectations;
- Use of process evaluation methods that allow for ongoing comparison of “actual” with “planned” activities and development of action plans to address any challenging findings;
- Regularly scheduled meetings of the teams, the CEAS ExcelleShare work team (for staging and transition of ExcelleShare), and the Vision Council;
- Development of a project proposal review and approval process to ensure projects undertaken were well thought out, consistent with program mission and objectives, and had measurable success criteria;
- Assignment of a Vision Council Executive to oversee ExcelleShare projects and to serve as the formal liaison between ExcelleShare volunteer members, staff, and CEAS management;
• Creation of a management review team, with the Vision Council Executive as a member, to oversee the approval and implementation of projects; and
• Required development of work plans (action plans) within 30 days of the project’s approval.

Successful matching of volunteers begins with an interview and initial introduction to ExcelleShare that includes:

• Clarification of responsibilities/tasks for leadership volunteers;
• Open discussion of the prospective roles that a potential volunteer participant might play in the organization;
• Formalization of the agreement on their involvement: time commitment, role, etc.

Key documents to help in achieving these goals include:

• Appendix E: RSVP/ExcelleShare Volunteer Interview Process
• Appendix F: Sharing Excellence in Volunteer Services Brochure
• Appendix G: RSVP & ExcelleShare Application Form
• Appendix H: ExcelleShare Orientation Power Point

**Lesson Learned:** Integration of leadership volunteers as part of your organizational workforce is a phenomenon that is process based and not well received without the active involvement of management and staff; acceptance of volunteers as co-workers requires management’s endorsement of the concept.

Integration occurs best through the establishment of teams that allow your staff and leadership volunteers time to get to know each other as they work together as partners on a meaningful project. From its inception, CEAS endorsed a workgroup based approach to ExcelleShare program development, with established teams assigned to specific tasks related to recruitment and training, marketing, program operations, and evaluation. Each team consisted of multiple volunteers and at least one “sponsoring” staff member that served as support for the team. Team activity was monitored by a Vision Council (VC) comprised of an ExcelleShare volunteer from each of the work teams, other “non-team” based leadership volunteers serving only on the “VC,” and
CEAS executive staff. The Vision Council’s primary functions were to interface with external partners, keep executive CEAS staff informed of team activity, and to establish program parameters.

The framework proved to be effective in not only coordinating activity, but encouraging innovative sharing of ideas between staff and the volunteer workforce. The team approach fostered “joint-ownership” of problems and facilitated an open dialogue between staff and volunteers.

**Lesson Learned: Be open and commit to utilizing the leadership volunteers to improve the quality of your organization.**

Practically speaking, clarity of the goals of the project and the role of volunteers and staff in the planning and management of projects helps to smooth many of the bumps. However, to evaluate the readiness of an organization to implement a leadership volunteer project and/or utilize leadership volunteers in their work, the following are critical:

- management that is open to feedback and suggestions, and is looking to/willing to make changes;
- open internal communications; and
- commitment to quality on the part of the organization and management.

The Center’s experience with leadership level volunteers has shown us that the feedback offered often highlights areas in need of improvement. It is important that the organization act on this feedback and is committed to achieving a high level of quality as we operationalize our mission. This helps to ensure the retention of the volunteer. This does not mean everything said is acted on, but an openness to change is likely the most critical element of a successful project with leadership volunteers.

**Lesson Learned: Organizations should make sure that they have meaningful jobs for leadership volunteers before recruiting them.**

It is important to make sure that meaningful “job assignments” are immediately available for newly recruited leadership volunteers. Although true for all volunteers, the “Baby Boomer” age cohort tends to be a very active, highly skilled and sought after volunteer. Although *ExcelleShare* did have a few volunteers who attended informational sessions and then joined up after a year’s hiatus on a waiting list, the
norm was to recruit a specific type of volunteer for an open team placement. It was found that leadership volunteers are attracted to certain job assignments because they could use their past work and developed skills or because it offered a chance for personal growth to work on a new project that expanded their skill set.

**Lesson Learned:** Make sure the leadership volunteers know exactly what is being asked of them and the limits of what the organization is capable of doing from a financial and human resources perspective. At the same time, if the team/leadership volunteer(s) proposes a realistic action plan, then the organization needs to make sure it acts on the recommendations submitted.

One of the chief concerns raised by *ExcelleShare* volunteers is that organizations often asked them to perform consultative work, but then did not act on their recommendations. To avoid this situation in their work within CEAS, each *ExcelleShare* team was asked to submit a charter for approval to the CEAS management team that clearly defined the parameters of the team’s activities. In addition, all projects in which leadership volunteers were asked to perform some consultative role (either as consultants to CEAS programs or to an outside partner) required the submission of a project proposal and the development of a memorandum of understanding and/or letter of agreement that clearly delineated the task and expected deliverable product(s). This tended to keep suggestions made by the *ExcelleShare* consultant volunteers manageable and more understood within the organizational context and to increase the air of professionalism in the transaction.

Key documents used to achieve consensus on projects include:

- Appendix C: *ExcelleShare* Gap Analysis
- Appendix D: Project Action and Work Plan
- Appendix I: *ExcelleShare* Project Development/Approval Procedure
- Appendix J: Project Evaluation
Lesson Learned: Do not be afraid to use your leadership volunteers as ambassadors and liaisons to lay or strengthen the ties with other community-based organizations.

ExcelleShare was purposely structured to encourage the development of community partnerships, with leadership volunteers working with community organizations both directly as consultants and indirectly through CEAS service programs. Specific strategies that have been used for engaging not-for-profit and governmental organizations in partnerships have included:

- Holding quarterly reflection event workshops in which community partners are engaged in discussion on topics related to civic engagement, nurturance of volunteerism, and use of leadership volunteers in their organizations;
- Development and dissemination of tools/instruments for evaluating an organization’s current use of volunteers and determining whether there are unmet needs that can be addressed through action plans that include either direct service and/or leadership volunteers;
- Creation of a protocol by which not-for-profits and/or ExcelleShare teams can conduct either specific projects on behalf of a partnering agency with CEAS management support (e.g., development of a business plan, consultation services for forming a 501(c)3, etc.) or in a civic engagement project in which CEAS and/or ExcelleShare resources are needed;
- Use of CEAS internal projects to “test” the concepts, forms, and protocols relating to a project’s approval, conduct of a gap analysis, and volunteer needs assessment in a not-for-profit;
- Working jointly with the Retired Senior Volunteer Program (RSVP) in reaching out to its “community partner stations” hosting RSVP volunteers to identify unmet needs in the organization that can be addressed by ExcelleShare leadership volunteers;
- Showcasing of ExcelleShare leadership volunteers and the contributions they make in the CEAS/RSVP/OASIS Making Connections quarterly magazine;
- Development of an ExcelleShare brochure; and
- Providing educational seminars (knowledge transfer) to not-for-profit volunteers and leaders in areas they suggest, such as grant writing, budgeting, volunteer management, etc.
Key tools used in engaging community partners include:

- Appendix C: ExcelleShare Gap Analysis
- Appendix D: Project Action and Work Plan
- Appendix F: Sharing Excellence in Volunteer Services Brochure (Volunteers)
- Appendix I: ExcelleShare Project Development/Approval Procedure
- Appendix J: Project Evaluation
- Appendix L: Sharing Excellence in Volunteer Services Brochure (Partners)

**Lesson Learned:** Make sure that leadership volunteers are included as members of the evaluation team assigned to monitor program quality. Be prepared for volunteer evaluators to take the organization’s mission seriously and be alert to issues that will impede the effectiveness of the organization to achieve its goals.

In general, leadership volunteers are professionals accustomed to participating in quality assurance/quality improvement activities. Their inclusion on the ExcelleShare Evaluation Team provided a depth of expertise that could not have been attained utilizing only staff. In addition to the benefits of having highly skilled individuals to help in the evaluative process, the presence of ExcelleShare volunteers on the Evaluation Team also assisted in:

1) reinforcing the perception that CEAS was serious in its goal to achieve full integration of leadership volunteers within the CEAS programmatic framework;

2) clarifying the organization’s quality standards for the ExcelleShare volunteers; and

3) providing insight into the organizational issues that impede effective use of volunteers.
Part III: Next Steps

*The Expanded ExcelleShare Vision:*

The goal of *ExcelleShare* is to establish a one stop Volunteer Resource and Support Center – the Civic Engagement Resource Center – that links leadership volunteers with non-for-profits and civic engagement opportunities. Housed within CEAS and Co-Managed with staff and leadership volunteers, the Volunteer Resource and Support Center will incorporate four distinct functions:

1. A Forum on Civic Engagement, for the discussion of civic engagement opportunities in the greater Capital Region community;
2. A Training Academy, supporting:
   - The professional and personal development needs of Baby Boomers wishing to participate in civic engagement opportunities; and
   - The needs of non-for-profits seeking to learn innovative, state-of-the-art volunteer management techniques;
3. A Civic Engagement Project Clearinghouse that:
   - consults with non-for-profits and governmental agencies on the development and review of projects;
   - coordinates/supports leadership volunteers that agree to work on approved projects;
   - and/or facilitates connections with other groups better able to support the proposed project;

A critical component of this initiative is the transformation of the current *ExcelleShare* Vision Council to foster greater community engagement, to conduct outreach to both organizations and individuals interested in linking to leadership volunteers or opportunities and to advance the CEAS, *ExcelleShare* and Civic Engagement Resource Center mission and goals.
PART IV: TOOL KIT

Appendix A: Civic Engagement: Recognition and Reflection

Appendix B: Models of Significant Service Disseminator’s Guide to Strategic Metrics and Results Tracking (SMART) Findings

Appendix C: ExcelleShare Gap Analysis

Appendix D: Project Action and Work Plan

Appendix E: RSVP/ExcelleShare Volunteer Interview Process

Appendix F: Sharing Excellence in Volunteer Services Brochure (Volunteers)

Appendix G: RSVP & ExcelleShare Application Form

Appendix H: ExcelleShare Orientation Power Point

Appendix I: ExcelleShare Project Development/Approval Procedure

Appendix J: Project Evaluation

Appendix K: Make the Connection…Volunteer! Report

Appendix L: Sharing Excellence in Volunteer Services Brochure (Partners)