

Scoping, Sourcing, and Supporting Projects for Skills-based Volunteers



Step 1: Identify and select a project.*

Identify potential projects. Consider these methods of generating ideas:

- Review strategic priorities and wish lists.
- Conduct a gap analysis.
- Identify challenges that could be addressed by a skills-based volunteer.

Assess each project for scope, urgency, and knowledge needed:

- Scope – Can you clearly define the work that needs to be done? Do you feel confident that it won't change over the course of the project?
- Urgency – When does this project need to be done? What are the consequences of not hitting the deadline?
- Knowledge Needed – What knowledge about your field and your organization will the skilled volunteers need? Is the outcome worth providing that education?

Step 2: Assess your readiness.

Success depends on your team's readiness to support skills-based volunteers with information and time. Consider these statements when determining whether critical team members have capacity and interest in supporting this work.

- We are interested in engaging in skills-based volunteers.
- We can designate a supervisor for each project and the supervisor has the necessary knowledge, authority, and time.
- We recognize that the internal team may need training to effectively support a skills-based volunteer and we are able to provide that training.
- The amount of onboarding and training is reasonable.
- Staff and/or volunteers will champion this effort.



Step 3: Develop a project plan.*

Develop a project plan that addresses these questions:

- What will this project accomplish? (What is the scope of this project?)
- What will not be accomplished by this project? (What is outside the project scope?)
- What are the completion criteria? (How will we know when the project is complete?)
- What is the timeline? (When will the project be completed and what are the milestones?)
- What resources will be needed? (What funds, technology, information, or space will be helpful?)

Step 4: Recruit, train, and support volunteers.

- Identify your sources of volunteer talent and develop a value proposition, if needed.
- Partner with other departments to recruit the right volunteer(s).
- Screen prospective skills-based volunteers and only accept the right fit.
- Review and refine the project plan as needed with the volunteer(s).
- Introduce volunteers to the team.
- Schedule and hold check-in meetings.
- Provide feedback to volunteer formally and informally.

Step 5: Evaluate and recognize.

- Recognize milestones throughout the project.
- Measure the impact and outcomes of the project.
- Share outcomes internally and externally.
- At the end of the project, meet with the team to review, evaluate, and celebrate.
- Connect volunteers to future engagement opportunities.

*Content adapted from *Powered by Pro Bono: The Nonprofit's Step-by-Step Guide to Scoping, Securing, Managing, Scaling Pro Bono Resources*. Taproot Foundation