West Coast LEAF

Volunteer Management System Review

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For West Coast LEAF

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Project Overview

Purpose
The purpose of this project is to improve West Coast LEAF's volunteer management system.

About West Coast LEAF
West Coast LEAF (Women's Legal Education and Action Fund) is the first and only organization in BC dedicated to promoting women's equality through the law. In the Vancouver office there are six full-time and two part-time staff. Staff manage four main streams of the organization's work: Public Legal Education, Law Reform, Litigation, and Development and Events which includes Donor Management. Each department recruits volunteers as needed.

About SFU Student Consultants
We are a team of six Simon Fraser University business students consulting on this project as part of a Leadership course under the supervision of Dr. Dianne Cyr. Our goal in this project is to use our skills and knowledge to aid West Coast LEAF by strategically analyzing problems, identifying opportunities, and recommending necessary changes to support organizational development and efficiency. Our primary specializations are Management of Information Systems, Business Technology Management, Human Resource Management, and International Business.

Project Challenges
West Coast LEAF staff have identified key concerns and challenges with the existing volunteer system in place. The key challenges identified are:

1. There are several business processes and an overall lack of standardized procedures.
2. There is not a formal system for volunteer management.
3. There is a lack of clarity of volunteer responsibilities and feedback.
4. There is a large variety of volunteers and no distinction is made between different levels of involvement.
5. Staff are overwhelmed which can lead to stress for the organization.

The current system to recruit volunteers is currently very disjointed across the organization. The majority of staff find their volunteers through the Office Manager, their own processes, or word of mouth references. This creates an informal and ad-hoc process that is hard to standardize and keep track of across the organization. This becomes frustrating for staff as they often are unable to find volunteers with the specialized skills that fit their needs. In addition, staff are concerned they are not able to effectively engage volunteers, meaning that they do not make full use of available talent.

Project Goals
In order to help the organization reach its goals, we identified the following areas of opportunity:

1. Redesign the current volunteer system and recommend an affordable and efficient software.
2. Create standardized business processes and volunteer standards.
3. Conduct surveys for volunteer input and information.
4. Create recommendations surrounding the current volunteer manual.

Data Collection

To gather information about West Coast LEAF's volunteer management, we began by meeting with Alison, Interim Executive Director, and Victoria, Office Manager, to develop a plan for data collection. The methods chosen to collect data were conducting in-depth interviews with staff to identify their concerns regarding the current system and sending a survey to past and current volunteers to get their feedback on the areas identified as challenging.

Interviews

Our insights regarding the organization and its challenges were gleaned from personal interviews with the directors and staff of West Coast LEAF. We met with Afie, the Youth Program Coordinator, Alana, the Manager of Public Legal Education, Basya, the Director of Development and Engagement, and Kendra, the Director of Law Reform. Overall, we got similar answers from our interviewees. We heard from the staff that they often scramble to find volunteers, particularly with the skills they need, and as a result end up not utilizing volunteers as well as they could. We had three in-depth meetings with Victoria and Alison, which helped us align with the project objectives, identify the key areas for improvement, and keep them informed about our process and recommendations.

Survey

To gain insights into the volunteers' perspectives, we sent out a survey via SurveyMonkey to past and current West Coast LEAF volunteers. The questions asked in the survey can be found in APPENDIX A. The survey respondents consisted of nine university students, one law professional and one high school student. The results showed that eight out of eleven survey responders reported that they were pleased with their experience at West Coast LEAF and had no complaints or dislikes.

Here is a summary of the findings from the survey:
- The majority of respondents suggested an increase in advertising for volunteer positions on the company website.
- Respondents suggested organizing volunteers based on their skills.
- Respondents suggested emailing out weekly task instructions.
- Respondents identified the need for feedback after the volunteer process and more meaningful work for volunteers.
- 81.82% of respondents stated that the volunteer experience met their expectations. Only 2 out of 11 respondents stated the experience did not meet their expectations at all.
- 10 out of 11 respondents expressed high interest in being an on-call volunteer for West Coast LEAF which supports our recommendation calling for a cohort of volunteers available to be called on when needed.
- Respondents indicated an average 4/5 satisfaction in all categories.

Two concerns from the comment section were identified as relevant:
- "I would have liked to gain more personally from my time with regards to my particular passions and questions about future career, etc. (e.g. meeting other staff members who worked in the different sections of West Coast LEAF's work, more discussion about how my practicum would help or benefit my future work in the non-profit or legal sector)."
- "Sometimes it can be unorganized, especially if there are no clear tasks for the volunteer to do."

These concerns are rooted in some of the challenges that were identified in interviews with West Coast LEAF directors. There is a lack of clarity regarding volunteer roles, and volunteers are not being utilized to their full potential.

External Research

An important source used in our research and recommendation was *The Abundant Not for Profit*. This allowed us to build on our foundation of knowledge regarding how not-for-profits work and the kinds of challenges they often encounter. A key take away was the fact that not-for-profit organizations often do not utilize and engage their volunteers to their full potential. It is important for not-for-profit organizations to recognize the potential of all volunteers and engage them. To do so, "they require a strong foundation, beginning with good policies, practices and processes" (Kelly and Gerty, 2013, p. 36). This is why it is critical for West Coast LEAF to redesign their current volunteer management system to better engage volunteers.

We also drew on academic literature to shape our organizational development consulting approach. *Organizational Development: The Process of Leading Organizational Change* provided us structure for our consultation, guiding us through the stages of Entry and Contracting, Data Gathering, Analysis, Diagnosis, and Feedback (Anderson, 2015). *Flawless Consulting: A Guide to Getting Your Expertise Used* taught us to "define our task as a process of discovery and dialogue more than as an act of diagnosis and prescription" (Block, 1999). *Humble Inquiry* encouraged us to enter the organization with an appreciative and positive approach (Schein, 2013). As student consultants, drawing on this expert knowledge serves to increase our legitimacy and advise us how to maximize our engagement's benefit to West Coast LEAF.

Analysis

Once we collected sufficient data, we performed a root cause analysis to identify the barriers to the goal of a robust and efficient volunteer management system. As a result, we identified three main areas that were challenges for the organization: multiple business processes, lack of clarity regarding volunteer roles, and inconsistent communication. As any solution would certainly involve the adaptation of software, we researched some current and potential platforms.

Processes

We found that there is no uniform standard business process or procedure for recruiting volunteers and tracking data. Generally, the process occurs as follows: the need for a volunteer is informally communicated, a staff member or the volunteer coordinator reaches out to potential volunteers via email or referral and the coordinator records the matched volunteer on a spreadsheet. While this approach is sufficient in most cases when volunteers are hired for simple tasks, a standardized process could increase efficiency and ease for staff. In particular, the occurrence of a scramble to find volunteers could be avoided by recruiting on a seasonal basis.

Clarity of Roles

Another challenge identified is that West Coast LEAF requires volunteers with a wide variety of skills for various roles. From our research, we found that "volunteer" is used to describe several roles, including committee member, board member, event crew, youth facilitator, administrative support, photographer, note taker, lawyer, researcher, consultant, and many other roles. While these are all volunteers in the sense that they do not receive pay for the work done, the type of work done for the organization is different for each type of volunteer. In addition, each of these roles is for a different amount of time, varying levels of responsibility, and recruited through different processes. It would be beneficial to optimize volunteer management by clarifying the classification and needs of these specific roles. The table below depicts our interpretation of how the current volunteers are currently viewed in the organization.

Table 1.1 Current Volunteer Categories

	Paid	**Unpaid**
Long-term	**Staff** Permanent director Administrator	**Organization member** Board Member Committee Member
Short-term	**Contractor** Event project manager Short-term staff	**Volunteer** Single Event (AGM, Equality Breakfast) Term position (Youth Facilitator) Pro-bono lawyer

To better understand the current classification of volunteers, *Table 1.1 Current Volunteer Categories* explains categories of long-term and short-term volunteers, organized as paid or unpaid.

Communication

Since many staff members are involved with management of volunteers for a variety of roles, there can sometimes be miscommunication between staff members and between staff and volunteers. In order ensure that all information is collected and delivered to the appropriate parties, it would be beneficial to clearly identify each volunteer's role and responsibilities in the volunteer management system. Additionally, a standardized communication process would allow some parts of the system to be automated by a digital information system while simplifying administrative tasks. By clearly mapping out the processes and roles, staff will be aware of volunteer recruitment options, where to access information, and what to communicate to volunteers.

Software

This is an assessment of the relevant software for West Coast LEAF.

Sales*f*orce

http://www.salesforce.org/nonprofit/collaborate/

The Sales*f*orce platform is primarily a Customer Relationship Management (CRM) platform, but also has functionality for social media, task management, and communications. The backend is a database of customer data, with the front-end modules customizable for the user organization. As West Coast LEAF is seeking a platform to host their volunteer data, the marketing or community engagement modules could be adapted to meet their needs. Additionally, West Coast LEAF has plans in progress to purchase a Sales*f*orce system for managing their donor database, so the volunteer management component could be added to that project.

Google Forms & Sheets

https://www.google.ca/forms/about/

Google offers a suite of web applications that include Sheets and Forms. All of these are free and publicly available online applications. Google Forms creates surveys that allow the front-end user to enter data that is then added to a Google Sheet spreadsheet, which serves as the back-end. As an alternative to paying for customized database software, West Coast LEAF could use Google Forms as the front-end public volunteer signup form, and Google Sheets would be the volunteer database. The form can be customized to collect the desired information and the permissions on the sheet can be adjusted so that some users can edit and others can only view and download the data. This would be a good option if paying for a customized system is not possible, or as a temporary solution until a proprietary system is implemented.

MailChimp

http://mailchimp.com/

MailChimp is a service the West Coast LEAF is currently looking into using. It is a freemium email marketing service. MailChimp provides easy to use templates, performance reports, social sharing, surveys, mobile apps and much more. The service is known to be cheap, intuitive, easy to use and compatible with different softwares. In particular, it has 2-way synchronization compatibility with both Salesforce and Google Forms & Sheets databases. The easy to use nature and software compatibility can be an extremely crucial to our technological recommendation to West Coast LEAF's system direction.

ConstantContact

http://www.constantcontact.com/

Similar to MailChimp, Constant Contact is the other market leader in the email marketing industry that West Coast LEAF is currently subscribed to. It offers a very similar service and business function as MailChimp. Constant Contact is known to be a trustworthy and reputable Email Marketing company that offers tremendous amount of customer support while having a reliable mail deliverability.

Recommendations

In order to successfully resolve the identified root causes, we suggest West Coast LEAF to take the following actions:

1) Re-classify Volunteers into Categories Based on Role Type

Based on our root cause analysis, we determined that a significant contributor to the confusion about the volunteer process is the ambiguity about the differences between the many types of volunteers. We recommend identifying the types of volunteers and defining them more clearly. Each type of volunteer as presented in the table below, may have a slightly different process for recruitment, tracking, and communication.

Table 2.1 Reclassification of Volunteers

	Task-based Hire	**Term-based Hire**	**Event Hire**
Specific Positions	Pro-bono Lawyer Researcher Graphic Designer	Committee Member Board Member Consultant	Photographer Speaker
Odd Jobs	Note-taker Admin task support Other	Cohort	Event Crew

Table 2.1 Reclassification of Volunteers classifies volunteers into three categories: task-based hire, term-based hire and event hire. 'Task-based Hire' is a volunteer for an identified, specific task that is generally short-term, 'Term-based Hire' refers to a volunteer who will remain with the organization on a term basis and 'Event Hire' refers to volunteer hired for a particular event organized by West Coast LEAF. Each of these can be hired for specific positions or odd jobs.

2) Pro-actively Recruit or "Hire" Volunteers on a Seasonal Basis (Cohort Concept)

In order to minimize the need of staff to search for volunteers when a need arises, we propose hiring volunteers on a term basis, so that at any point in time there is a team of volunteers prepared to assist. It is recommended that all volunteers who would be part of this group would be brought on board at the same time, would be oriented together, and would operate as a team, holding each other accountable for responsibilities. As a team they would ensure that all of current volunteer tasks are met. Staff could call upon this volunteer cohort for any tasks that might arise at any time during their term. The cohort would be posted as a job description on the website and volunteers can apply to be part of the team for a set term. The length and timing of the term should be selected by staff and fit with the natural yearly schedule of West Coast LEAF.

3) Adopt a New Volunteer Management Process

The information flow for the proposed volunteer management process is illustrated in the *Flow Chart for Volunteer Management.* The diagram highlights the suggested procedures for West Coast LEAF to follow. It is separated by various stakeholders and their responsibilities within procedures.

When a staff member has a need for a volunteer, they will first ask their current volunteer cohort. If the cohort members are not able to complete the task, the staff member can search the volunteer pool database to find volunteers with the appropriate skillset. If the database does not have a suitable volunteer, then the job can be posted on the website. A potential volunteer accessing the website will have the option to either apply for posted opportunities (including cohort positions), or to add their name, resume and specific skills information to the volunteer database. This data will be managed by a new system.

Figure 2.1 should be included in the Volunteer Manual and used by staff to track the internal volunteer recruitment and communication process. The diagram can be used to identify methods for hiring volunteers. The green shapes represent a starting point depending on the need of volunteers, while the red shapes represent the end point in the volunteer hire process.

4) Use Standardized Job Descriptions for Common Positions

Although many tasks will be completed by the cohort team of volunteers, some more skill-specific or temporary jobs will require additional recruitment. For positions that are posted regularly, including the cohort positions, standardized job descriptions should be produced and re-used each time volunteers are needed. Ideally, every posted position would have a job description with basic information about the organizational expectations, and detailed information about the particular volunteer job.

5) Regain Confidence in the Volunteer Manual

West Coast LEAF has an internal Volunteer Manual that outlines all policies and processes for volunteers. The manual contains quality and relevant material, but has recently fallen out of regular use. We recommend that the manual be updated to include these new process recommendations and other current information, that all staff become familiar with it, and that it be followed for volunteer management. Specific recommendations for manual changes are outlined below.

2.2 Categories of Volunteers
- Include description of all types of volunteers i.e. cohort volunteers in a separate section.
- Define Board of Directors.
- Define Special Case Volunteers.
  - Volunteer referral programs, student community service activities, and career-education programs

Role of Volunteer Coordinator
- Expand the role of the volunteer coordinator to include recommended activities.
  - Update available opportunities on the West Coast LEAF website with detailed postings.

2.3 Position Descriptions
- "Prior to a volunteer assignment or recruitment effort, a position description must be developed for each volunteer position. This position description will be provided to each accepted volunteer and used in subsequent management and evaluation."
  - Expectations for positions to be adjusted with the recommended process.

5.1 Request for Volunteers
- Include description of recommended process.
- Clarify expectations during the interview process.
- All staff to have access to volunteer information.

5.4 Interviewing
- "Interviews must be conducted in person by the Volunteer Coordinator, Staff Supervisor or both."
- Include questions in the manual not provided to the volunteers.

5.5 Selection Screening
- "The person responsible for screening must complete two to three reference checks, as appropriate, to determine the applicant's suitability if necessary."

7.1 Supervision
- Assessments
  - Supervisors, Committee Chairs, and Board designate(s) will conduct annual assessments on each volunteer or at the end of volunteer terms if less than one year.
    - Include standard performance management system for all volunteer feedback.
    - Include committee/team self-assessments.
    - Feedback to be kept in the database, available to all staff.

6) Implement Software to Manage the Volunteer Database

The software recommendation must perform the following core functionalities of the organization:

- Compatibility with online data entry form - little to no administration required.
- Compatibility with MailChimp.
- Ability to look up volunteers with specific skills.
- Different levels of user access (front end input, back end data extraction, administrator).

Based on our analysis of the software and system criteria, we recommend implementing the following software solutions:

Salesforce Customer Relationship Management System

Not only is Salesforce compatible with the existing software and database of West Coast LEAF, its functionality in social media and communication will aid in furthering West Coast LEAF's future objectives. The software will be a helpful solution in providing a platform to support the centralised recruitment process. This solution would work best for West Coast LEAF because it could be customized for their needs. However, this solution would be expensive to implement.

Google Forms and Sheets

As a more cost effective or interim solution, West Coast LEAF could use Google Forms and Google Sheets to achieve most of the project objectives. It is a free service that lacks the depth and customizability of Salesforce but it does cover the basic needs of the organization. The forms function would be used to collect volunteer information online, and input it directly into the database. West Coast LEAF staff could access the information as a Google Form, which can be adjusted to different levels of user access. Staff would be able to search the list for volunteers with specific skills.

MailChimp vs Constant Contact

Constant Contact and MailChimp both deliver similar service as an email marketing tool. Due to their similarities, it is not necessary to keep both services as the financial capability can be put to better use on other services. MailChimp's slightly lower price range along with strong compatibility with third party software makes it a clear choice to use instead of Constant Contact.

Implementation

In order for this volunteer management system to be a success, it will require commitment and investment from the board and all staff members. The recommendations in this report are intended to be a foundation for the further development and adaptation of solutions to fit the specific organizational context. We encourage the staff and board of directors to communicate regularly about the success and challenges of the new processes and make changes as necessary. Additionally, we believe it is important to keep in mind the six core concepts described in our recommendation.

The immediate steps that need to take place are the following:

1. Upgrade the software information system.
2. Identify seasonal needs for volunteers and specific skillsets
3. Recruit the first cohort.
4. Prepare standard job descriptions.
5. Distribute and become familiar with the updated Volunteer Manual including the new volunteer management process as outlined in this report.

We are aware of a few possible sources of resistance to change. Currently, the existing resource allocations in the organization regarding volunteers are handled differently by each volunteer supervisor. Therefore, implementing a new system could be perceived as a threat to already established volunteer resource processes. Another issue could occur if staff do not plan for volunteers in advance. During the interviews, staff acknowledged that they usually notice the need for volunteers as they are working on a particular project.

In order to mitigate the resistance, we urge the Board of Directors and project leaders to emphasize the need for the change and engage the staff in the process. The organization must facilitate a mutually understanding atmosphere that communicates the benefits and opportunities that this change could bring. Ideally, West Coast LEAF should be able to implement the new system and bring all the staff on board quite quickly in order to immediately begin experiencing the benefits.

References

Anderson, D. (2015). *Organizational Development: The Process of Leading Organizational Change*. Los Angeles: Sage.

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Schein, E. H. (2013). *Humble Inquiry*. California: Berrett-Koehler.

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Appendix A: Volunteer Survey

SFU's Leadership students are doing a brief survey about your experiences volunteering with LEAF in order to identify and understand areas of improvement and develop a more efficient and effective volunteer management system for the future. Please take ten minutes of your time and fill this out and help us help LEAF.

How did you hear about volunteer opportunities at West Coast Leaf?

1. School Event
2. Fundraiser
3. Website
4. Referral
5. E-mail
6. Other _____

Which of the following describes you at the time of your volunteer term at West Coast LEAF? (select all that apply)

1. Student (high school)
2. Student (university/college)
3. Intern
4. Law professional
5. Other industry professional
6. Retired
7. Other: _____

What type of role(s) did you have with West Coast LEAF? (select all that apply)

1. Board member
2. Committee member
3. Administrative roles
4. Legal Volunteer
5. Note taker
6. Event volunteer (ex: AGM, Equality Breakfast, etc. day-of roles)
7. Youth workshop facilitator
8. Other Workshop Facilitator
9. Outreach / Tabling Volunteer
10. Other: _____

How long have you been a volunteer for West Coast LEAF?

a. I have helped out at one or two events
b. I have volunteered every day for at least a week
c. I have been an active volunteer for a year or more
d. I have been a regular volunteer for several years
e. I am no longer a volunteer

What was the best part about working at West Coast LEAF?

_____

What was the worst part about working at West Coast LEAF?

_____

How satisfied were you with the following parts of your volunteer experience?

1. Unsatisfied   2 Somewhat dissatisfied   3 Neutral   4 Somewhat satisfied   5. Very satisfied 6. N/A
   a. Finding available volunteer positions
   b. Identifying volunteer roles that met your skills
   c. Volunteer application process
   d. Task instructions while in your volunteer role
   e. The impact your contributions had on the goals of the organization

If answered 1-3 above, how could the previous aspects be improved?

Did your volunteer experience meet your expectations?

   Yes, the volunteer experience was what I expected.

   No, the volunteer experience was quite different from my expectations.

   Why? _____

Would you consider being an on-call volunteer for West Coast LEAF for a period of 6 months? (on-call meaning they will call you when they need some help with advance notice)

   Yes

   No

Any other comments about your experience volunteering at West Coast LEAF?

_____