



CANADIAN SOCIÉTÉ
BLOOD CANADIENNE
SERVICES DU SANG

Volunteer Program Strategy

September 2002



Volunteer Program Strategy – Business Case Summary

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EXECUTIVE SUMMARY

CBS must prepare for changes that are imminent in the new volunteerism movement. All evidence indicates that Canada is on the brink of substantive changes in the available volunteer labour pool. These shifts in patterns and trends suggest that the current volunteer labour force at CBS will also undergo significant change. This will represent a potentially significant threat to CBS's ability to deliver the high level of customer service, which is now at the heart of its donor recruitment and maintenance strategy.

This Volunteer Program Strategy business case addresses opportunities for Canadian Blood Services to redefine its volunteer program and program model as a means of achieving organizational priorities and objectives. CBS must aggressively expand its donor base, and work diligently to retain valued existing blood donors. Volunteer involvement (both in-house and third party volunteers) at CBS is critical to the organization's capacity to meet its current collection targets. The key focus of this strategy is aimed at developing and refining new and meaningful roles for volunteers, developing and strengthening relationships with third party volunteer groups and ensuring that the infrastructure that supports the volunteer program at CBS has the capacity to assist CBS to achieve its mission. With respect to the development of new roles for volunteers at CBS, several opportunities have been identified and are outlined within this document while it is expected that other potential opportunities will be realized with further development.

This volunteer program strategy builds on key findings and recommendations delivered to CBS through a recent volunteer program research project conducted by Linda Graff and Associates Inc. The final report has been appended to this document and is referenced throughout. The report includes thirty-eight detailed recommendations, which support eight major recommendations. These eight recommendations which are the basis for this program strategy are outlined below.

Eight Major Recommendations From Volunteer Program Research Report:

1. Reconceptualizing Volunteer Roles – Enhanced and New Roles
2. Organizational Commitment to Volunteerism
3. Improving Effectiveness of Volunteer Management Within CBS
4. Connecting Volunteer Involvement to Customer Service
5. Enhancing Staff Understanding of Volunteers and the Volunteer Program



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6. Third Party Volunteers (development and recognition of partnerships)
7. Adequate Resourcing for the Management of Volunteers
8. Dealing with Staff Concerns (volunteer resources staff)

While the key deliverable driving the program research project was to identify new and meaningful roles for volunteers (recommendation one above), the research project findings lead to recommendation six above, which is also seen as critical. In this regard, this program strategy summarizes the importance of volunteer involvement and community partnerships in CBS's successful management of Canada's blood supply. While individual volunteer contributions that support clinic operations and marketing initiatives are important, this strategy highlights that partnerships with third party groups and the involvement of volunteers from those third party groups are significant contributors in CBS achieving collection targets. Approximately forty one percent of all collections occur at mobile clinics, which represents in excess of 300,000 units annually. Many of these mobile clinics and particularly those outside of urban areas are not only supported by third party volunteers but they are reliant on them. Third party volunteers secure clinic space, create awareness in their community/organization, organize promotional initiatives, recruit donors, secure refreshment sponsorships and recruit, schedule and staff pre and post donation customer service roles with members of their group, all in order to help meet established collection targets. These strong community linkages and supporters are instrumental in convening the community to give blood at many mobile clinics. This is an area that is pivotal to maintaining and increasing collections. A key element of this proposal underlines the need to improve both third party partnerships and third party volunteer involvement as a means of sustaining and increasing donor targets and collections goals over the long term.

Volunteer Program Strategy Priorities:

The recommendations in the Volunteer Program Research Project are far reaching and broad. Based on the most critical of priorities as outlined in the research project and the needs, objectives and capacity of the organization to address the findings, this program strategy focuses on three specific initiatives. These three initiatives are profiled below and in turn are listed in order of operational priority. They are further detailed in the Project Scope and Deliverables section:

1. Development of Volunteer Assignments Which Link to Corporate Objectives – Further develop and detail both new and existing volunteer assignments to meet current and future organizational and operational priorities, ensuring that they align



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with volunteer trends. Develop standards for screening, selecting, orienting, training and evaluating volunteers in each of these roles.

2. Build on Community Partnership Contributions – Strengthen, maintain, and enhance our current community partnerships to sustain them for the future by working more closely with representatives of third party groups, developing a new partnership strategy to increase community level support and provide the tools they need to do their jobs well. To maximize this effort, the responsibility to build these partnerships should be broad involving centre management, donor services and collections staff and specifically Volunteer Resource Coordinators and Donor Recruitment Coordinators.
3. Create a CBS Model to Support Volunteer Involvement – Develop an improved volunteer management model and risk management framework for Volunteer Resources, including updated corporate policies, procedures and standards of practice for the volunteer program. The resulting system and tools would be tailored to the distinct features of individual and third party volunteer involvement.

The case for proceeding with the strategies outlined herein is strong. Volunteers, when appropriately placed and properly managed, will continue to be an exceedingly cost effective asset. Investment of resources in role development and the volunteer program infrastructure will generate enhanced volunteer participation and productive volunteer involvement aimed more directly at the achievement of key organizational targets. These strategies identify opportunities to build stronger, healthier partnerships with third party groups, reduce risk and liability, enhance delivery of customer service to donors and contribute to improving the image of CBS.



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BACKGROUND

In December of 2001, CBS completed a major review of its Volunteer Resources Program. With a fundamental focus on identifying new and meaningful roles for volunteers, which would support the goals of the organization, the volunteer program research project, also provided CBS with insight into trends in the Volunteer sector. The review project, which was conducted by Linda Graff and Associates Inc., also identified the need to rework and redesign the current volunteer program infrastructure to effectively support the needs of these new volunteer roles and the program of the future. This review, which is detailed in the report entitled *Volunteer Program Research*, contains a total of thirty-eight recommendations, which stem from eight key recommendations. These eight recommendations are:

- 1) Reconceptualizing Volunteer Roles – Enhanced and New Roles
- 2) Organizational Commitment to Volunteers
- 3) Improving Effectiveness of Volunteer Management Within CBS
- 4) Connecting Volunteer Involvement to Customer Service
- 5) Enhancing Staff Understanding of Volunteers and the Volunteer Program
- 6) Third Party Volunteers (development and recognition of partnerships)
- 7) Adequate Resourcing for the Management of Volunteers
- 8) Dealing with Staff Concerns (volunteer program staff)

Overall, these eight major recommendations from the Volunteer Program Research Report serve as the basis for this Volunteer Program Strategy. From this list of eight recommendations, this Volunteer Program Strategy will focus on three key deliverables including to identifying and developing new and meaningful roles for volunteers, building and broadening community partnerships with third party volunteers, so critical to the success of many CBS mobile donor clinics and ensuring that the volunteer program is suitably positioned with the required tools, systems and supports to effectively meet the needs of the organization. Recommendations on strategies and the resources required to achieve these objectives are identified in this paper. With particular emphasis on third party volunteers and the significant impact on blood collections that they hold, the following new or re-defined potential roles for volunteers have been identified:



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- 1) New and innovative roles for volunteers in Donor Recruitment such as those offered through a Volunteer Speakers' Bureau can help CBS with delivery of consistent, appropriate messaging to targeted areas such as workplaces, schools, faith groups, community groups and associations in order to reach key market segments
- 2) Corporate Volunteer Involvement – Create opportunities for corporate groups seeking short term efforts as part of their community outreach initiatives (i.e. steps to follow and roles they can play in hosting a CBS blood donor clinic).
- 3) Community Communications Liaison – skilled volunteers could be recruited and trained to take on project based activities such as writing articles for internal newsletters, community newspapers and notice boards to broaden our capacity for grass roots donor recruitment
- 4) Special Event Volunteers – a group of volunteers can be trained to attend trade shows, sporting and community events to deliver key messages, raising awareness of CBS's strategic goals and inviting the general public to become blood donors
- 5) Youth Corps/Councils/Committees – develop youth councils or committees and provide a guide of activities and concepts they could take and develop that are tied to our corporate objectives that help link CBS to the youth market
- 6) Volunteer Service Leaders – recruit and train volunteers to assist donor clinics with volunteer training, administration, support and tracking

It should be noted that the above list of roles is not considered all-inclusive and will likely exist in addition to some of the existing volunteer roles. In addition, it can be expected that other new and meaningful volunteer roles will evolve over time.

The following provides the required details surrounding all of the above noted as well as recommendations going forward.



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RATIONALE

The Past

CBS inherited its volunteer program infrastructure from Canadian Red Cross. It was an outdated system initially designed to recruit and manage volunteers in relatively low-demand positions and in a much less regulated environment.

In the past, anyone wishing to volunteer at a blood donor clinic was welcome; volunteers were not screened, reference-checked or trained. Generally, volunteers organized themselves and took on the responsibility for scheduling their own shifts. For many volunteers, volunteering in the blood system provided an important, social role; for others it was a way to give back; for most it constituted an important networking function and allowed the opportunity to connect with friends and neighbours in small and large communities across the country. Community blood drives have been an important part of the social fabric and community connection.

Supporting Canada's blood supply has been an important role for a broad range of community groups, and their members have been involved in various aspects of organizing and operating blood donor clinics for decades. As is the case in other health and service organizations in Canada, many existing paid staff roles were once performed exclusively by volunteers. Indeed, if one traced back far enough most paid staff work in the entire human service system was pioneered by community minded volunteers who identified a need and worked towards its resolution.

The Present

Throughout the 1990s, as the blood system became increasingly regulated certain volunteer roles were abolished. Volunteer assignments such as Donor Registration involved welcoming, verifying donor identification, BLIS check, and completing basic information on the Record of Donation. This role shifted to combine tasks and resulted in the development of a new Reg/Tech staff position. Volunteers were also formerly responsible for sealing units at various stages throughout the process and this is now also a staff function. Then, when CBS assumed responsibility for the blood system from CRC, other roles requiring knowledge, expertise and training were also transitioned to staff roles. This included the Rest Bed role where volunteers monitored donors post-donation, applied a Band-Aid to the venepuncture site, timed the rest period and escorted donors to the refreshment area. Volunteers were also heavily involved in donor telerecruitment and performed receptionist responsibilities at many locations. These changes largely affected the active volunteer base, veteran volunteers were shifted up to three times into different roles and those who chose to



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remain active finally landed in the current Donor Refreshment position. Much of the work originally done by volunteers has been transferred to paid staff. At present, most individual volunteers are confined to a relatively narrow range of positions in support of donor clinics. Furthermore, in comparison to the in-clinic post-donation care positions volunteers filled in the past, many of these roles such as Refreshment Volunteer require little skill and don't offer volunteers the challenge and opportunity to learn and gain experience.

Nevertheless, even this current reduced contribution by individual volunteers is considered significant if these resources had to be replaced with paid staff.

Changes throughout CBS have had a lesser impact on relationships with third party groups and the involvement of third party volunteers – as their roles are not associated as closely with the regulated, in-clinic manufacturing process, which impacted so greatly on the “clinic volunteer”. CBS is still reliant on volunteers for direct service to donors, and to promote, organize and host donor clinics. This reliance is most significant at non fixed site clinics and is absolutely critical at new mobile clinics and most mobile clinics outside urban centres as well as other types of clinics such as high schools and universities, where the donor base is constantly changing from year to year.

Current data indicates that CBS mobile clinics represent approximately forty one percent of all clinic venues. These clinics generate in excess of 300,000 units of blood annually. Many of these clinics are dependent on the involvement of volunteers, most of who are third party group members. At many of these venues and in particular those outside urban areas, the donor clinics would simply not happen without the support of the local community groups. It is essential that CBS begin now to further develop, rebuild and enhance relationships with these groups, if reliance on these mobile clinics for blood collections is to continue in the future. This fact is supported by recent community partnership project carried out at CBS Toronto in an effort to increase donation frequency and the number of new and returning former donors. Through a variety of initiatives designed specifically to build these strong partnerships, the centre not only maintained blood collections but in fact saw significant increases in those clinics where the new model was introduced. At these clinics, overall collections increased 41.6%, new donor rates increased 29%, the number of former donors returning to donate increased 23% and the frequency rate for regular donors also increased modestly.



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Trends in Volunteering

Current trends in volunteering suggest that there has been a recent sharp decline in the number of Canadians volunteering¹. Organizations across the country report that those volunteers who remain involved tend to be much more selective in the kinds of assignments they are willing to take on. *“The estimated percentage of Canadians who volunteered in 2000 declined to 27% from 31% in 1997.”*² *“A greater number of volunteers...contributed money instead of time.”*³ In 2000, the federal government and the voluntary sector committed to the development of a national volunteerism initiative. A report was prepared that highlights the state and future of volunteerism in Canada, this was excerpted from the report's executive summary *“...there is growing evidence that urgent action is needed to ensure volunteerism remains a vital force in Canadian society. There are now fewer volunteers that there were three years ago, and those who remain are taking on an increasingly heavy workload.”*⁴ The benefits of volunteer involvement can be limitless in the right context and given the proper support. *“Volunteers are an important human resource to an organization. They bring a passion for the cause, a commitment to the purpose and are motivated by their choice of involvement.”*⁵

It is noteworthy that other organizations are seeking to fill increasingly complex and demanding positions. For example:

- Canadian Cancer Society involves volunteers in leadership roles researching, analyzing and preparing reports on patient case histories, facts and statistics, they also have volunteers transport patients to their treatment appointments, and facilitate emotional support programs
- St. Michael's Hospital in Toronto involves volunteers to provide support/assistance to staff, patients, and families in clinics and in inpatient nursing units, in the Surgical Information Lounge, Intensive Care areas, in assisting with the transport of patients and/or supplies to various areas of the hospital and assisting staff in research
- Each hospital within the Toronto University Health Network offers volunteer placements in a variety of specialty areas as transplant, oncology and neurosciences to name a few
- ALS Canada's volunteers facilitate support groups

¹ *Highlights from the 2000 Survey on Giving, Volunteering and Participating* – Prepared by Canadian Centre for Philanthropy with contributions from Canadian Heritage, Health Canada, Human Resources Development Canada, Statistics Canada, 2001

² Same as footnote 1

³ Same as footnote 1

⁴ *The Canadian Volunteerism Initiative, The Report of the National Volunteerism Initiative Joint Table*, 2001

⁵ *Canadian Code For Volunteer Involvement*, Volunteer Canada, 2000



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- Crohn's and Colitis Foundation of Canada involve volunteers as video newsletter editors, and audiovisual training material producers
- Arthritis Society have engaged a volunteer in as their e-commerce manager
- Canadian Aids Treatment Information Exchange have volunteers writing grant proposals

Many organizations are now seeking volunteers to fill increasingly complex and demanding positions. Today, volunteers are found providing comfort and directing traffic in hospital emergency rooms; and working alongside police officers to provide direct services to victims and their families at crime scenes. They are also participating in disaster response programs and international aid and relief initiatives. They initiate, organize and co-ordinate massive fundraising campaigns and events, sometimes involving thousands and tens of thousands of participants and around which millions of dollars are at stake.

It would be detrimental to conceptualize 21st century volunteer work as menial. It is equally inappropriate to characterize the 21st century volunteer as either unskilled or willing to perform menial work on the periphery of the "real work". These trends and data suggest that volunteer programs based on those kinds of outdated visions are at significant risk and likely to disappear in the future.

The Future

A volunteer program system and strategy that is appropriately managed and resourced with highly skilled staff can help to generate increased collections, enhance community linkages and improve donor retention by ensuring volunteer assignments are clearly aligned to address these key organizational targets. A model designed to select the most appropriate volunteer for challenging assignments and prepare volunteers to meet stringent volunteer performance standards, combined with appreciation systems that are effective and meaningful to the volunteers themselves will generate an enhanced return on investment in an already cost-effective volunteer work force.

Volunteering at CBS has the potential to develop in many exciting directions. While CBS may not be able to involve volunteers in certain high risk or highly regulated functions, there is vast potential for development of volunteer opportunities outside of the core manufacturing area. Two things are perfectly clear about the future of volunteering at CBS. First, wherever volunteers are engaged at CBS, both they and the organization must perceive their work as meaningful. Second, volunteers will demand efficient, effective, and accountable management systems to support their involvement. This will require that Volunteer Resources throughout CBS are professionally trained and certified volunteer program management staff. In addition,



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volunteer program management systems will need to be integrated into an efficient infrastructure that is consistently implemented in all donor clinics across the country. CBS must be ever aware that it is a “volunteers’ market” and if the organization does not make volunteering at CBS attractive and rewarding, volunteers will find another organization that will.

Population demographics tell us that 2006 will see the largest segment of the adult population approaching retirement age. These baby boomers have been the mainstay of the volunteer movement over the last two decades. They are highly skilled achievers with enviable networks of influence. They tend to know what they want and they demand accountability from service providers and institutions around them. They have more wealth than any generation before them and it is anticipated that this will allow them to enjoy longer and healthier retirement years. It is not likely that this army of vast potential will volunteer to “hand out coffee and cookies”, which is how much of the current role for volunteers in clinics is perceived.

All evidence indicates that the successful volunteer program of the future is one, which offers assignments that are designed to be visionary, supportive, flexible and project-based. Volunteerism will, without question, continue to change over the next ten years, and it is critical to the organization that CBS prepare now for the changes we know to be on the horizon.



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SECTION 1: PROJECT SCOPE AND DELIVERABLES

This project will develop each new role and align existing roles for CBS Volunteers; it will also comprise the development of a new model to support effective volunteer resource management at CBS. The new model will align volunteer involvement in support of key organizational priorities. The model will enhance volunteer program capabilities in keeping with industry best practices, current and future trends and patterns affecting volunteerism.

The following three areas are identified as critical to the successful implementation of new and meaningful roles for CBS volunteers and for the development of the new model required to support these roles in donor clinics across the country:

1. Development of Volunteer Assignments Linked to Corporate Objectives – A number of new volunteer assignments linked to CBS objectives, has already been identified. Other existing roles will be redefined. Formalizing the design and standards for the introduction of these roles and developing standards for recruiting, screening, selecting, orienting, training and evaluating volunteers in each of these roles will be undertaken. The following specific initiatives are required;
 - Design standard service assignments that link and support organizational priorities and objectives and distribute to a variety of CBS departments for input
 - Develop tools to support each new and existing role from recruitment through to recognition
 - Pilot new roles at 3 locations, assess overall impact and benefits and determine go forward approach to further roll-out
2. Building and Broadening Community Partnership – Strengthen, maintain, and enhance our current community partnerships to sustain them for the future by working more closely with representatives of third party groups. Develop a new partnership strategy to increase community level support and provide them with the tools they need to support them in their role. This project will aim to tap into new opportunities for community partnerships. Community Liaison meetings and other community leadership meetings already planned could serve as a forum to help with this piece of the project.
 - In collaboration with Donor Services staff, develop a strategy to participate in community meetings with third party group leaders, objectives of these meetings would include: identify enablers that will sustain and enhance the partnership; identify needs of the groups in terms of tools needed to support



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their efforts; identify volunteer risk management issues and the required standards and processes to mitigate.

- Involve members of the Community Liaison Committees in a consultation and review of the strategy to receive feedback, adjust and implement once approved at all levels
 - Mechanisms for involving groups and their members in service to CBS to help track, maintain and reward involvement will be developed to facilitate strong, reliable third party partnerships
 - Prepare the tools required to manage, encourage, support and sustain third party partnerships, nurture the relationship and cultivate new partnerships
 - Review this initiative annually with Community Liaison Committees to identify areas requiring update
3. Create a CBS Model to Support Volunteer Involvement – Develop an improved volunteer management model and risk management framework for Volunteer Resources, including updated corporate policies, procedures and standards of practice for volunteer resource management systems. The resulting tools would be tailored to the distinct features of individual and third party volunteer involvement. In this environment, one set of standards would be applicable to all volunteers at CBS, regardless of their location, affiliation or assignments.
- Strike a working group made up of internal expertise to assist with all phases of the project
 - Gather samples of all existing policies, procedures, standards, processes, training and orientation materials and other systems in place at all CBS donor clinics
 - Develop materials that support a systematic and standard approach to a CBS volunteer resource management model that includes all aspects of this function from recruitment to recognition, from planning to reporting and program measurement
 - Make all information available electronically
 - Prepare regular presentations for approval of materials and products developed for implementation
 - Prepare a phase-in approach for the new model with pre-established and approved timelines and clearly identified lines of responsibility and accountability
 - Review mechanisms and systems to ensure regular monitoring and updating



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SECTION 2: PROJECT FEASIBILITY (SWOT ANALYSIS)

STRENGTHS –

- The initiative is consistent with organizational objectives to increase collections
- Volunteers are an exceedingly cost-effective asset
- CBS' corporate statements underline how critical volunteers are to the organization, this project will support those statements and operationalize corporate support for volunteer involvement
- New roles and an updated program model will contribute to increased efficiencies and link volunteer involvement to organizational priorities
- When measuring the investment required to put this strategy in place and the potential benefit the organization can realize the benefits far outweigh the costs
- There are dedicated volunteer program resources both at Head Office and in the field

WEAKNESSES –

- This strategy requires incremental funding which may not be available given the current financial situation
- The organization is currently undergoing exhaustive change, adding additional strain on the system may have a negative impact on field operations
- It is unlikely that the current infrastructure can manage the changes and support identified which are required for the volunteer program

OPPORTUNITIES –

- The opportunities presented in this business case demonstrate that while a financial commitment is required to support the project, there is a potentially significant return on investment
- To focus volunteer input squarely on corporate objectives
- To modernize volunteer opportunities for involvement that attract highly skilled and professional volunteers



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- To solidify and sustain critical community linkages
- To increase community and individual support
- CBS is already in a vast state of change – this is a good time to move forward on other innovations
- To reduce or minimize the risks of involving volunteers
- To expand the organization's capacity
- To increase volunteer performance by streamlining volunteer screening, placement, training and supervision
- To align CBS' volunteer program to meet the projected volunteerism pattern shifts

THREATS –

- If the project is approved without any incremental funding or resources, some initiatives will be delayed or deferred and timeframes for many deliverables will be affected with the potential long term impact on the Volunteer program itself
- Lack of corporate support leads CBS donor clinics to not implement the deliverables of the new program strategy
- Volunteers may become bored with limited roles and abandon the blood program
- Opportunities to attract new and dynamic volunteers will be limited
- The reliance on community groups and third party volunteers to continue to support mobile donor clinics may be jeopardized and in turn impact negatively on blood collections

SECTION 3: ASSUMPTIONS

- The development and implementation of the plan as proposed in its entirety, would require incremental resources
- One additional staff resource will be allocated to the Volunteer Resources program to continue to respond to day-to-day operational requirements, assist with the remodel and support the maintenance of the program into the future



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- Field resources will contribute to, and assist with, the development of each strategy
- Buy-in will be forthcoming from all donor clinic administrators and management at all CBS locations
- Direction and standards of practice delineated in the new Volunteer Program Model will not be optional (i.e. CBS locations will be held accountable for implementing new initiatives)
- Management support at all levels will be provided throughout the course of the project



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SECTION 4: ALTERNATIVES

Alternative 1	Status Quo
Description	Continue to operate in the same manner and develop short-term solutions as needed when issues arise, with some limited visionary development
Arguments in Favour	<ul style="list-style-type: none">• Paid staff risks are easier to manage• Paid staff can be hired at high professional standards to work longer shifts (than volunteers) and therefore provide higher levels of consistency and continuity• Paid staff require less scheduling and less day-to-day maintenance
Arguments Against	<ul style="list-style-type: none">• Over time volunteer roles will be replaced with paid staff• Lack of vision for the program will cause community relationships to erode over the long term• Erosion of community relationships will negatively affect collections• Organizational pressures to continue to reduce resources for the volunteer resources program in favour of other priorities• Decreasing volunteer involvement will negatively impact customer service to donors• Fewer committed volunteers will negatively impact collections• Lack of program standards and the ability to measure its impact will not provide sufficient monitoring and opportunities for growth or enhancement• Instance of risk and liability will continue in the absence of consistent policies and volunteer program management



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	<p>standards</p> <ul style="list-style-type: none"> • Inconsistency of skills and vision in volunteer resources field staff limits the potential of the volunteer program to adapt to external trends and opportunities to maximise the potential to solve organizational problems • The costs to CBS of hiring sufficient paid staff to replace the community resources that help convene a significant proportion of mobile clinics would be prohibitive • The costs of replacing all donor refreshment volunteers, drivers, greeters, etc. with paid staff would be prohibitive • CBS would lose its community profile and its presence in small community networks across Canada • Paid staff could not reach out into community networks in the way that third party volunteers can
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Alternative 2	Develop the three strategies detailed herein over either a three or six year period
Description	Prioritize the items presented and determine how we might amortize the expense of developing all of these systems over a longer period. Within a three-to-six period all three strategies would be accomplished and in place.
Arguments in Favour	<ul style="list-style-type: none"> • Our vision, values and quality statements underline how critical volunteers are to CBS in a number of ways, this project will in fact back up those statements and operationalize corporate support for volunteerism • An infrastructure is already in place to support the volunteer resources program • A clear vision and stronger program model will contribute to increased efficiencies and link volunteer involvement to organizational priorities • CBS is already in a vast state of change – this is a good



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	<p>time to move forward on this</p> <ul style="list-style-type: none">• Important community partnerships will be solidified and positively affect collections• The volunteer resources program will gain respect and be seen as a corporate priority and as such receive the support of various levels of Head Office and clinic management• Well selected and trained volunteers will positively impact customer service to donors and increase donor retention• More opportunities to involve community supporters in contributing to Canada's blood program will translate to more ambassadors for blood collection• The new model will include systems to effectively measure the program's impact which will also translate to increasing the profile of the program• CBS will be in a position to benefit from a well positioned volunteer program aimed at meeting volunteerism pattern shifts• Standardized management systems will enhance volunteer productivity, ensure more consistent standards in volunteer performance management, provide better support to busy clinic staff, save staff time in that they won't be developing systems individually in isolation
Arguments Against	<ul style="list-style-type: none">• Competition with other corporate fiscal priorities• Lack of current resources to conduct this remodel effectively• Potential exists for staff resistance to enhanced volunteer involvement (e.g. labour relations), if perception is that staff roles will be encroached



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SECTION 5: FINANCIAL SUMMARY

The three key deliverables identified above will be achieved through a combination of deployment of existing resources through the Volunteer Resources Head Office annual budget as well as incremental funding, as identified below. The achievement of all deliverables is based on the application of incremental funding in two scenarios; first a three-year timeframe and secondly a six-year timeframe. Given the current climate of fiscal restraint, it is understood that the timeframes required to achieve all deliverables may need to be stretched. It should however be noted that with no incremental resources or funding, it would be extremely difficult to implement the recommended course of action as current support for the program is occupied with provision of basic ongoing program support and maintenance. However, the existing Volunteer Program budget does provide for partial development of a limited number of strategies identified within this proposal including completion of the volunteer speakers' bureau role and supporting training tools; updating the volunteer policy manual; reprinting existing recruitment brochures and posters; standardizing orientation materials and developing limited products to support volunteer recognition; and producing a limited number of promotional wear to replace worn volunteer identification items.

INCREMENTAL RESOURCE DETAIL:

The following financial details are those resource requirements identified for Head Office only to develop tools and systems identified in this strategy. It is recognized that there will be an impact on field resources, which will likely vary from location to location, in order to implement various elements of the strategy. It is also noted that this initiative will eliminate duplication of efforts, which in turn should result in some cost savings. Given these variables, it is not possible to measure the overall impact on field resources at this time. This will be monitored on an ongoing basis

3-YEAR PLAN

Costs	YR 1	YR 2	YR 3	TOTAL
[Redacted Content]				



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(i) Labour Resources:

- The incremental labour resources includes one NEW FTE to assist with the development of the project and to continue to support the new model once it is in place – this position would aim to be classified at a Program Assistant level (estimated \$XXX annually).

(ii) Non-Labour Project Costs:

- The incremental funds sought in Non-Labour Project Costs for the development of this strategy is \$XXX.
- These funds would facilitate development of materials for each of the three deliverables such as: training materials tied to each volunteer assignment; community clinic planning and administration tools; corporate volunteer orientation materials; standard volunteer recruitment posters, brochures and display units; volunteer recognition products and volunteer identification items suited to each role.

(iii) Post-Project Sustaining Funds:

- The incremental funds sought in Post-Project Sustaining Funds are \$XXX annually

6-YEAR PLAN

Should the incremental resources requested to accomplish this project need to be amortized over a longer period, each of the three project deliverables can be achieved over a two-year window, thus doubling the project timeframe. This would require that the incremental funding for the project be divided over six years and opposed to three years but would not however affect the overall amount requested.

Costs	YR 1	YR 2	YR 3	YR 4	YR 5	YR 6	TOTAL



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SECTION 6 - DELIVERABLE TIMEFRAMES

Based on the three-year timeframe, the following timetable would apply to deliverables:

Objective #1 – Design New and Revise Existing Roles (Year 1 – April 2003 to March 2004)

- Design, develop collaterals and roll out three new volunteer service assignments that support corporate objectives
- Redesign, realign and standardize all existing volunteer services assignments and supporting collaterals
- Produce standard recruitment, screening, training and support materials for all volunteer service assignments

Next Steps:

- Develop success metrics for corporate 2003/2004 corporate plan (i.e. develop one assignment focused on youth to youth donor recruitment and implement at 7 locations; retrain 70% of existing CBS volunteers; develop self-study training tools for third party partners and implement in 7 locations)

Objective #2 – Build on Community Partnership Contributions (Year 2 – April 2004 to March 2005)

- Survey community partners to benchmark level of satisfaction
- Define partnership roles, discuss reciprocal expectations and produce standardized partnership framework which includes succession planning component
- Produce community clinic planning and promotions kit

Next Steps:

- Prepare success metrics for 2003/2004 corporate plan

Objective #3 – Create a CBS Model to Standardize Volunteer Program Management (Year 3 – April 2005 to March 2006)

- Upgrade Volunteer Management Information System to accommodate new program changes and ensure appropriate level of data tracking and reporting
- Create collaterals to support design of service assignments, volunteer recruitment, selection, placement, orientation, training, maintenance, monitoring, motivation



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and recognition (merge 15 systems of volunteer program management to 1 system)

- Redesign community and corporate level communication vehicles to support strategy
- Roll out all new products and support implementation
- Review each element and adjust as needed

Next Steps:

- Prepare success metrics for 2003/2004 corporate plan



Volunteer Program Strategy – Business Case Summary

SECTION 7: RECOMMENDATION TO EXECUTIVE MANAGEMENT TEAM

In conclusion, it is recommended that this business case and the strategy described as Alternative #2 be approved. Supporting this recommendation is the rationale presented within this business case as well as the report provided by Linda Graff and Associates. In addition, it is noted that in 2001-2002, volunteers contributed 262,000 hours to Canada's blood program, which equates to 134 FTEs. If CBS were required to pay volunteers for their service and a dollar per hour rate were fixed at \$6.85 (minimum wage in Ontario) this would be valued at roughly \$1.8 million in service each year.

Return On Investment:

The total financial investment required for the renewal of the Volunteer Program amounts to \$XXXXXX (***) over three years. If volunteers continue to support the blood program at the current rate the return on investment over three years would be valued at \$5.4 million in service or the equivalent of 670 FTEs over a five-year period.

(***) While the implementation of this strategy will require involvement of field resources, given the many variables involved, it is not known at this time what the impact on field resources will be. With the introduction of each phase of the project, the overall impact on the field will be assessed on a location by location basis. Support and guidance will be provided to assist each location to identify the specific impact on local resources and where necessary to adjust budget requirements. Where necessary, implementation timelines adjusted accordingly.