working with
technical volunteers

A Manual for Nonprofit Organizations

techsoup.org

Working with Technical Volunteers Manual

Version 2

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CHAPTER 1:
Introduction

Many nonprofits and schools do not have enough time, expertise or funding to use technology in all the ways they would like. Technical volunteers can fill the gap by tackling projects that in-house staff cannot handle and that do not require paid consultants. This manual has been created as a guide for nonprofit organizations and schools that want to work with technical volunteers.

What's Covered:

- Why did we make a manual about technical volunteers?
- How to use this manual
- About TechSoup

Why did we make a manual about technical volunteers?

Nonprofit organizations and schools seem to keep their computer systems going the same way they keep everything going: a few really creative, resourceful people take charge and perform miracles! Often, there is a spectrum of technical needs that are beyond the training and experience of staff that can be met by a volunteer. Obtaining technical volunteer support presents its own challenges for many nonprofits and schools.

Even groups that have successfully involved volunteers in their work sometimes run into problems when asking volunteers to work on technology issues. Recruiting and managing technical volunteers can be intimidating, especially when staff people do not fully understand the work that techies do. In addition, organizations must balance the benefits of technical volunteers' help with the need to establish sustainable, consistent computer support.

After nearly two decades of recruiting, matching and managing technical volunteers, TechSoup has developed an effective methodology. We have found several key ingredients to a successful technology volunteer project. These include:

- Well-defined needs
- Specific deliverables
- Flexible, short-term schedule
- Clear, consistent communication
- Built-in sustainability

We have designed this manual with these elements in mind.

How to use this manual

This manual is intended to help organizations and schools:

- Assess their technical needs and identify areas in which volunteers can help

- Recruit technical volunteers, assess their skills and screen them

- Manage technical volunteers

- Document the work that is done

- Find resources that will help throughout the process

Chapters 2 through 4 of this manual describe sequential steps in the technical volunteer process. Whenever possible, we have provided specific examples from our projects to help you see how other organizations have worked with technical volunteers. We also try to give you the reasons that each step is important to your success.

Following the explanations in Chapters 2 through 4, you will find worksheets or templates for planning and documenting your project. We have also provided online resource lists of technical assistance providers outside the scope of TechSoup, called TechFinder.

The worksheets include:

- Technical Volunteer Questionnaire

- Technical Inventory for your organization

- Ways to document your technical projects, whether you are working with consultants, paid staff, volunteers or all three

This manual, which is free of charge, can be downloaded from our Web site (www.TechSoup.org) so that you can personalize the worksheets and other tools to best suit your needs. We recommend keeping both the templates and completed project documentation in a central location. In order for the information and tools to be most helpful, you will need to train technical project staff to use them.

About TechSoup

Since 1987, TechSoup has been helping nonprofits and schools to access and use technology. Our other services include:

- Donated and discounted software for nonprofits through TechSoup Stock

- Technology assessments and planning assistance for nonprofits and schools

- TechSoup.org, a comprehensive Web site of technology resources, discounts, how-tos and referrals for nonprofits

TechSoup is a 501(c)(3) nonprofit organization. Please contact us for more information about our services or to provide feedback about this manual.

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CHAPTER 2:
Preparing to Work with Technical Volunteers

Because volunteers have a limited amount of time to help you, it's extremely important to know just what you want them to do. You should consider preparing for new volunteers as you would for a new employee or consultant. This section will help you:

- Decide who can best accomplish each task

- Scope a successful volunteer project

- Create a volunteer project description

What's Covered:

- Who are technical volunteers?
- Determine who can best meet your needs
- Scope a successful volunteer project
- Write a volunteer job description
- Sample Volunteer Job Description
- Chapter 2 At A Glance

Who are technical volunteers?

Technical volunteers are enthusiastic, skilled individuals who also care about contributing to society. They may be accustomed to a different working environment than yours, but they have come to your organization to help contribute to its efforts. Everything you can do to maximize the time they spend with you will increase mutual satisfaction with the arrangement, as well as encourage a volunteer to repeat their gift of time and expertise.

Based on our experience, it's helpful to recognize some generalizations about technical volunteers. While these characteristics do not apply to all situations, technical volunteers are generally:

- Accustomed to a fast pace

- Results-oriented

- Willing to go the extra mile

- More informed than you on technology issues

Discussing differences in working style and expectations will help orient a volunteer to your organization and define a successful working relationship. For more on this topic, see Chapter 4, "Managing Technical Volunteers," on page 16.

Define and prioritize needs

Technical volunteers can be most effective when you explain your needs clearly. Often, nonprofits and schools start from a place where they do not know what they need, but simply know that they could use some assistance. The worksheet entitled "Technology Assessment" includes a series of questions to help narrow this desire into more specific goals. The following are some of the key considerations:

- What role has technology played in your organization in the past?

- How do you see technology enhancing your ability to fulfill your mission or grow as an organization?

- What resources does your organization have available for technology? What are the obstacles?

- Who has been responsible for technology planning and implementation, and who do you think needs to be involved or trained in the future?

If you need help with the technology evaluation process, consider having a (paid or volunteer) professional conduct a formal needs assessment.

Determine who can best meet your needs

After you have identified and prioritized needs, the next step is to determine who can address each one. It's important to establish realistic expectations of how volunteers can help your organization, class or school. Keep in mind that in some cases, you could be better off paying someone to accomplish the work.

Volunteers can be wonderful sources of technology support, but they cannot always solve your problem. Before you bring on a volunteer, think through which of your technology needs are suited to a volunteer project and which would be better met by a consultant or a system administrator. A mismatch between the project and the kind of assistance you seek can waste time and resources for everyone concerned. The bottom line is that your use of a volunteer should be a planned and thought-out part of your overall technology support strategy.

We have found that technical volunteers can be most effective if they are assigned work that is clearly defined, short-term and non-urgent. In other words, don't ask for too much, and never forget that the person is donating their free time. Keep in mind that most people volunteer because it feels good; the best volunteer projects offer opportunities for making a significant contribution to an important cause and for meeting new people and having fun.

Before you decide to search for a volunteer, ask yourself the following questions:

- *Is your need short-term or ongoing?*

  For regular maintenance issues, like backups and user support, consider training someone on staff who can be available to the organization on a consistent basis. Volunteers' schedules often vary, so it's best not to count on a commitment of longer than a few months. It's wonderful if a volunteer decides to provide ongoing support, but the organization will almost certainly run into situations for which the volunteer is too busy to help.

- *Is the project urgent or mission-critical?*

  If so, it's best to hire a consultant or a system administrator. Volunteers may not be available for urgent or time-sensitive needs, due to other commitments, such as their jobs. However, if your timeline is more flexible, a volunteer may fill your need. For instance, if you need someone to repair your database so that you can access contact information about your clients for daily phone calls, you should probably hire a consultant. If you need training on how to use your database to generate reports for a grant deadline several months from now, a volunteer might be perfect.

- *What is your potential budget?*

  A volunteer is a low-cost solution up-front. If what you need is a consultant or system administrator, you will have to raise the money for it.

- *Is the project limited in scope?*

  An ideal volunteer project is one that you can break down into specific, achievable tasks with a clear deliverable at the end. The project should be a small part of the overall technology plan for your organization.

  For instance, in TechSoup's experience, creating and managing a database is almost always too big a project for a volunteer. A volunteer might be able to do a limited portion of a database project, such as assessing an existing database and making a recommendation for how to develop it.

- *What time commitment does the project require?*

  If your project requires a more sustained effort over many months, a consultant on contract might be a solution to consider.

- *What kind of follow-up will be needed?*

  Does the project require ongoing maintenance? If so, you may want to hire or dedicate a staff member. For instance, if you ask a volunteer to create a Web site with a page of information about upcoming events, you will need to plan on resources and expertise to update it. Depending on the complexity of follow-up required, your volunteer might be able to train a staff member as part of the project.

  Your organization will also reap the most benefit if you document all changes and upgrades a volunteer makes to your computer systems.

- *How large is your organization?*

  If you have more than 15 or so computers, seriously consider hiring a part-time or full-time system administrator, or contracting a consulting firm to do regular maintenance. Volunteers can still be useful on specific tasks — and can be a great asset to system administrators — but they cannot substitute for consistent, ongoing support from a staff person or regular contractor.

Scope a successful volunteer project

Once you have determined that your organization could use a technical volunteer, you will need to specify the types of tasks involved. Certain types of projects — due to their scope — are more appropriate for volunteers than other projects. Here, we discuss some typical projects. In the worksheet section, we provide a list of considerations for further defining each type of project (see the Appendix on page 23).

Training

A volunteer can be successful at providing certain kinds of training to you or your staff. Volunteers can be especially good for one-on-one tutoring, a kind of training that is extremely desirable but not always cost-effective with a consultant. A project could include a volunteer coming in to observe a staff person working and teaching them how to improve their efficiency and use applications better. A rare volunteer may have the teaching experience necessary to prepare materials and give a full-fledged training to a group of people. When you are screening volunteers to perform training, make sure they have aptitude and interest in teaching, not just technical expertise. Ask about their teaching experience.

Web design

Volunteers can be a huge help to an organization that needs to build a Web site or update an existing site. Volunteers often enjoy Web projects because the work can be done on a flexible schedule from their home or office. However, building a new site involves many steps: planning the content and design, developing the technical components of the site, purchasing a domain name and Web hosting space, and uploading the site. In addition, the site will require maintenance and your staff may need training in order to do it. As mentioned previously, handling all of those steps is a huge job and probably an unrealistic expectation of a volunteer. Engage a volunteer for particular components, such as helping you evaluate Web hosting companies.

Local area network

Volunteers can be successful in setting up a small local area network and training someone on staff on how to maintain and troubleshoot it. Fixing existing networks is a little more complicated. If you need someone to "pull cable" (extend wiring to each computer, printer or other network device), we recommend hiring a consultant. One reason is that you will want the work to be guaranteed, and another is that pulling cable sometimes means drilling through walls near power supplies. If a volunteer starts using power tools for you, make sure you are clear about your liability for his or her safety.

Troubleshooting hardware and software

A volunteer can be successful at troubleshooting tasks as long as you are clear about what the specific problems are that you need addressed. For example, you might ask a volunteer to look at a PC that keeps crashing or a printer that sometimes garbles your print jobs. Ultimately, it's best to have someone on staff who knows your systems and is responsible for troubleshooting. It's usually an urgent problem when computers crash, and a volunteer might not be able to respond quickly enough.

Assessing old or donated equipment

How can you use donated equipment most effectively? A volunteer can be of great help when deciding which machines can be incorporated into your office setup. A good example of a volunteer project might be assessing five computers, telling you which ones are worth saving and making recommendations for upgrades and recycling options.

Installing memory or new peripherals

If you know you need more memory or a peripheral but don't know exactly what it involves or how to get it, a volunteer could help by making recommendations, physically installing new memory or setting up a new printer, scanner, or back-up system.

Write a Volunteer Job Description

Once you have identified appropriate volunteer projects, you need to write descriptions that summarize your requirements, much like paid job descriptions. Be sure to include the specific project objectives, available resources (such as budget and supplies), needed skills and time commitment. Clarifying the scope of work ensures that you won't forget important parts of the job and helps volunteers know what to expect.

Mission and background

Volunteers come to you because the impact of their efforts is amplified by the work that you do. They will want to know what you stand for. Convey the basic thrust of your work and who benefits. If you work for a school, include information about the ages and backgrounds of the students, the school's history, information about what your class is currently studying or anything that might be of interest to potential volunteers.

Description of the project

A clearly defined project helps attract volunteers. Many will be reluctant to take on a project that is not well defined for fear it will take more time than they are willing to give. Even if the time commitment is clear, the volunteer will be wary of spending less time lending his or her expertise and less time accomplishing tangible tasks.

In your description, explain:

- Specific tasks to be accomplished
- Hardware and software involved
- Goal of the project

Skills needed to do the project

Does the volunteer need to know a particular accounting or database application? Do you need someone who knows local area networks (LANs) or Web development? If necessary, do some research so that you can be as specific as possible.

Time commitment

Try to estimate the number of hours the project will take. The number of weeks a volunteer has to complete the project, as well as any deadlines, affects a volunteer's decision to take on a project.

Work schedule

What are the hours of the volunteer liaison on your staff? Can the work be done only between 9 A.M. and 5 P.M.? Does the staff person have any flexibility or ability to be there to meet with the volunteer on nights or weekends?

Contact information

Who is the volunteer liaison on your staff, and what is the best way for a potential volunteer to get in touch with that person?

Sample Volunteer Job Description

Lab Volunteer

The lab is a science classroom for students in grades 4 through 8. Students take field trips to our lab, where they can participate in hands-on experiments in chemistry, biology and physics. We also have a computer science component of our programs. The lab is located in downtown Berkeley, CA, and is accessible by public transportation. We are looking for a technical volunteer experienced with DSL, XP and firewalls to assist us with the following:

- Connect DSL router to network.
- Configure seven PCs (running Windows XP and Vista) to use DSL over the network.
- Assess firewall needs and set up firewall.

We would like to finish this project within two months. We can accommodate a flexible schedule, but our building is locked and inaccessible after 9 P.M.

Interested volunteers should contact:
Susie Schmoozie at *susie@thelab.edu*

Key Points Recap

- While these characteristics do not apply to all situations, technical volunteers are generally:

  - Accustomed to a fast pace
  - Results-oriented
  - Willing to go the extra mile
  - More informed than you on technology issues

- Prepare for new volunteers as you would for a new employee or consultant:

  - Define and prioritize needs
  - Decide who can best accomplish each task
  - Create a Volunteer Job Description

- To define and prioritize your volunteer needs, you should first evaluate your technology process.

- After you have assessed your needs, your next step is to determine who can address each one. Establish realistic expectations of how volunteers can help your organization, class or school.

- Volunteers can be most effective if they are assigned work that is clearly defined, short-term and non-urgent.

- Once you have figured out that your organization could use a technical volunteer, you will need to specify the types of tasks involved. Certain types of projects — due to their scope — are more appropriate for volunteers than other projects.

- The volunteer needs to know what they are being asked to do. A clear job description (for staff or volunteers) is essential for success.

Your Chapter 2 Checklist

☐ **Define and prioritize volunteer needs.** Consider some of the following questions:

  – What role has technology played in your organization in the past?
  – How do you see technology enhancing your ability to fulfill your mission or grow as an organization?
  – What resources does your organization have available for technology? What are the obstacles?
  – Who has been responsible for technology planning and implementation, and who do you think needs to be involved/trained in the future?

☐ **Determine who can best meet your needs.** Before you search for a volunteer, ask the following questions:

  – Is your need short-term or ongoing?
  – Is the project urgent or mission-critical?
  – What is your potential budget?
  – Is the project limited in scope?
  – What time commitment does the project require?
  – What kind of follow-up will be needed?
  – How large is your organization?

☐ **Scope out your volunteer project.** Some considerations to help further clarify a project and types of tasks involved include the following:

  – Training
  – Web design
  – Local area network
    • Troubleshooting hardware and software
    • Assessing old or donated equipment
    • Installing memory or new peripherals

☐ **Write a Volunteer Job Description.** Make sure the description contains the specific project objectives, available resources (such as budget and supplies), needed skills and time commitment. Include the following:

  – Mission and background
  – Description of the project
  – Skills needed to do the project
  – Time commitment
  – Work schedule
  – Contact information

CHAPTER 3:
Finding Volunteers

You have identified and prioritized your organization's technology needs, and you have scoped out where and how technical volunteers can be most effective. You are now ready to seek out the right volunteers through the appropriate channels. Once you have some potential candidates in mind, it's important to take the time to properly screen them. In this section, you'll find a set of guidelines to help you in this effort.

What's Covered:

- Identify a volunteer liaison
- Post your call for volunteers
- Screen potential volunteers
- Use the Technical Volunteer Questionnaire
- Use the Technology Inventory
- Chapter 3 At A Glance

Identify a volunteer liaison

Before you bring your technical volunteers on board, you need to consider who will:

- Recruit and screen them
- Work with them
- Provide supervision for the volunteers' work
- Be there to thank them appropriately

To make communicating with your organization easier for the volunteer, and to make monitoring the project easier for you, identify one staff person or teacher to handle communication with your volunteer. When a volunteer helps you with your computers and something goes wrong, you don't want to overwhelm him or her with five separate help requests during the week. Instead, think about combining your requests in one call. Ideally, the liaison should also be available to meet with the volunteer at his or her convenience, which may mean having the flexibility to work occasional evenings and weekends.

Identify one staff person or teacher to handle communication with your volunteer.

Post your call for volunteers

Once you have written your Volunteer Job Description, the trick is to get it out into the community to places where people with both technical skills and a social conscience will look. The following is a partial list of places to try:

- **Volunteer listing services** – A volunteer listing service provides a place for nonprofits to post their Volunteer Job Descriptions and for potential volunteers to decide which agency to work with. The job descriptions may be listed online or through a local volunteer center.

- **Corporate Volunteer Programs** – Many corporations have bulletin boards on which they post volunteer opportunities. You can find tech-savvy volunteers in most companies, not just in companies that specialize in technology.

- **Schools and Community Colleges** – Many vocational schools and community colleges will post your Volunteer Job Description in a career center or on a departmental bulletin board. Some professors may announce the opportunity in their classes. Try contacting departments related to technology, such as engineering and computer science.

- **Your colleagues** – Ask colleagues at other nonprofits in your community where they go for technical volunteers.

- **Other volunteers** – Often, current volunteers are the best source for new volunteers. They may know of someone, or they can tell you where to post a job description.

- **Mailing lists** – More and more people are using mailing lists to communicate about community needs and events. Ask around about the mailing lists people in your community belong to, especially those relevant to people with computer skills. Find a person who belongs to the list to post your job description for you.

- **User groups** – User groups meet either in person or online to discuss different types of hardware and software. Look for them in your local computer newspaper (if you have one) or on the Internet. Yahoo! and Google user groups, Craigslist.org, and Yahoo's hardware user groups are good places to start.

- **Newspapers and newsletters** – You can list your Volunteer Job Description free of charge in many local newspapers, P.T.A. newsletters or other community publications.

Screen potential volunteers

You may be tempted to welcome the first volunteer who shows up with open arms. Remember that you are going to invest time and energy managing them, and you are going to entrust them with your computer systems. It's crucial to screen potential volunteers by interviewing them first. You may even want to check their references as you would with a consultant. Think seriously about whether they will be a good match for your organization's needs.

Ask the volunteer if they would be comfortable working in an environment with limited resources.

Some questions to consider when interviewing volunteers include:

What skills will the volunteer need to accomplish the task?

Ask about the volunteer's previous experience with the technology you want them to work on. Bear in mind that some volunteers can learn skills as they go, especially if they have other technical expertise or are taking a class. It may be worth accepting a volunteer with less-than-ideal experience if she or he is serious about learning.

Is the volunteer willing to work in a nonprofit context?

Many volunteers may be coming from a corporate environment. Ask if potential volunteers have ever worked at a nonprofit. How was their experience? If they have not worked at a nonprofit, explain some of your ways of working, including your budget, staff skill level and office atmosphere. Ask the volunteer if they would be comfortable working in an environment with limited `resources. Are they willing to help you reach technology compromises that work and not necessarily recommend the latest system?

For further discussion of this aspect, see Chapter 4, "Managing Technical Volunteers," on page 16.

Will the volunteer communicate clearly about their work?

Can the volunteer explain technical issues in a way that you understand? If she or he uses a word you don't know, will she or he define it clearly? Is the volunteer willing to report back regularly on the project's progress?

Is the volunteer reliable?

Make sure volunteers are willing to make a specific time commitment and finish the project by the deadline you give. Checking their references is the best way to see if they are likely to follow through.

Use the Technical Volunteer Questionnaire

Working with technical volunteers is different experience than working with other types of volunteers, since they often know more than you do about the volunteer project. You probably screen your nontechnical volunteers for the skills needed for your organization. In the case of a technical volunteer, you might not even know what to ask.

To assist you in gathering the technical information that you need, we've created a volunteer questionnaire. (See the Technical Volunteer Questionnaire, page 45.)

As with our other worksheets, the questionnaire is available for you to download and modify to suit your organization. You can delete the software packages that you don't have or don't see adding in the future. Likewise, be sure to add software and hardware that your organization uses that's not listed on this questionnaire, and add any questions that might be specifically relevant to your organization.

This tool is quite useful on many levels. It can help you see skills possessed by technical volunteers that are not readily apparent. The questionnaire may also influence your work plan for a volunteer. If your volunteer has a variety of skills involved in building a Web site, you could steer the project towards their strengths in, let's say, marketing the site or dealing with e-commerce issues.

Use the Technology Inventory

At TechSoup, encourage nonprofits to complete an inventory questionnaire detailing the

software and hardware currently in use before embarking on a technical volunteer search. It will help you to match volunteer skills to what your inventory reveals. (See the Technical Inventory Worksheet on page 54.)

Key Points Recap

- Before you bring your technical volunteers on board, consider who will:
  - Recruit and screen them
  - Work with them
  - Provide supervision for the volunteers' work
  - Be there to thank them appropriately

- Be sure to let your Volunteer Job Description out into the community, where people with technical skills and social conscience will look.

- It's crucial to screen potential volunteers by interviewing them first. You may even want to check their references as you would with a consultant. Think seriously about whether they will be a good match for your organization's needs.

- When screening a technical volunteer, you need to gather as much information as possible about his or her skills and strengths in order to match the volunteer with the appropriate projects and/or develop a proper work plan.

Your Chapter 3 Checklist

☐ **Identify a volunteer liaison to handle volunteer communications.**

☐ **Post your call for volunteers.** Consider the following places:
  - Volunteer listing services
  - Corporate volunteer programs
  - Schools and community colleges
  - Your colleagues
  - Other volunteers
  - Mailing lists
  - User groups
  - Newspapers
  - Matching programs

☐ **Screen all potential volunteers.** When interviewing volunteers, consider these questions:
  - What skills will the volunteer need to accomplish the task?
  - Is the volunteer willing to work in a nonprofit context?
  - Will the volunteer communicate clearly about their work?
  - Is the volunteer reliable?

☐ **Use the Volunteer Questionnaire to help identify a volunteer's technical skills and strengths.**

☐ **Complete the Technology Inventory to match your volunteer skills to the software and hardware currently in use.**

CHAPTER 4:
Managing Technical Volunteers

What's Covered:

- Preparing for the project
- Beginning the project: Off to a good start
- During the project: Ensuring success
- Closing the project: Clear communications
- Working with corporate volunteers and consultants
- Liability issues: Maintaining security
- Avoiding and addressing potential trouble spots
- Chapter 4 At A Glance

Preparing for the project

As with any other volunteer project, there's bound to be some preparatory work on the part of the organization before the technical volunteer can begin. Here are some areas to consider.

Back up data

Before anyone (volunteer, staff or consultant) makes changes to your computer systems, it's crucial to back up your data. If you're currently not doing this, you'll need to explore the best option for your machines. This may take a little time, but it's worth the investment.

Inventory hardware and software

The Technical Inventory Worksheet provided in this manual (page 54) will help provide you with a clear picture of your situation and needs. It can also be a useful tool for monitoring progress during an upgrade.

Other preparation

In addition to making people in your organization aware of the project dates, there may be work specific to your project that you need to complete before the volunteer may begin. For example, written content and images may need to be given to a volunteer who is building a Web site.

Beginning the project: Off to a good start

Schedule a first meeting

It's a good idea to schedule an initial meeting with your volunteer. This will give you and the volunteer an opportunity to get to know each other and discuss the project. It also gives the volunteer a chance to get a better idea of resources and equipment he or she might need. During the session, you can also teach the volunteer a little bit about what you do. Here are some good points to cover:

- Purpose of the class/lab/center/organization.

- Population or community you serve (bilingual students, homeless, people with disabilities).

- Main contacts for the volunteer (including on-site computer-literate people).

- Budget, if any (including computer budget).

- Purchasing process.

- Location of the phone, tools, sign-in/sign-out sheet, restroom, coffee, etc.

- Staff. In addition to making a significant contribution to an important cause, people volunteer to meet new people and to have fun.

- Work plan. Make sure both you and the volunteer understand the work to be done, the timeline and when you will next check in about progress.

- Your nonprofit context. This is particularly important if the volunteer has never worked with nonprofits before. Take some time to discuss the culture and processes of your workplace.

Remember to identify one staff member to act as the volunteer liaison.

During the project: Ensuring success

Track progress

Check in regularly. The staff liaison should communicate with volunteers regularly to talk about their progress and any problems or changes to the plan. Technical volunteers may be used to a rapid pace at work. If your organization needs to take things slower, you can communicate this while keeping the project moving toward completion with regular meetings, emails or phone calls. This is also a great way to let volunteers know you value their time and energy.

Maintain accountability. Volunteers must understand that even though they are giving their time away, it doesn't mean they can ignore agreements about the project. Some schools or nonprofits have their volunteers sign letters of commitment, and others rely on the volunteer's buy-in to keep them interested and coming back. Conversely, volunteers should feel comfortable setting limits on what they can do.

Document all work

Make sure the volunteer keeps a record of the work performed. We've included a Computer Maintenance Log in the Appendix for your volunteer to use (see page 53).

Closing the project: Clear communications

Thank the volunteer

Keeping communications clear is the key to successful technical volunteer projects. This is most noted at the end of a given project.

> *Be sure to thank the volunteer once they've finished a project, even if they've decided that they love your organization and will continue volunteering.*

We suggest doing something personal, like buying them a gift certificate at their favorite bookstore, or giving them something that's related to the mission of your organization. For instance, if you're a nonprofit that provides whale-watching services, you may want to give your volunteer a free trip aboard your boat.

When thanking volunteers, think about what will be meaningful to the individual volunteer. He or she might prefer to hear about the impact of their work, receive your newsletter or be invited to a staff party rather than receive a t-shirt or plaque.

Establish future communications

Closing the project also lets the volunteer know that their commitment with you is finished and gives you the opportunity to find out what types of projects that they might like to do in the future. Of course, make sure that you have accurate contact information and have established the best way to reach the volunteer.

Working with corporate volunteers and consultants

When you bring in a volunteer or consultant who is used to working in the corporate world, you may have to orient them to nonprofit culture and circumstances, almost as if they were visiting another country. The key to a successful working relationship is explicit communication about what makes your agency's needs and processes different.

Corporate volunteers and consultants may be accustomed to recommending expensive, complex solutions. They might envision a system that is actually faster, bigger, fancier and harder to maintain than you need. They may not realize that their solution does not fit your nonprofit context. It's crucial that you spell out your organization's limits regarding money and staff capacity.

> *It's a good idea to ask the volunteer or consultant to give you at least two assessments.*

Corporate volunteers and consultants are also often used to dealing with newer technology. If they walk into an agency, for example, and discover a bunch of five-year-old machines, their first reaction might be to want to upgrade everything, even if those machines are doing the job they are supposed to. It's a good idea to ask the volunteer or consultant to give you at least two assessments: a "dream" assessment (if you had an unlimited budget, what would you do?) and a "bare-bones" assessment (with a limited budget, what are the things you would do first?).

Make sure the volunteer or consultant is aware of the overall skill level of your staff and of the resources you have for training staff and supporting the technology once it's in place. It's also a good idea to let them know about the speed of your budget approval processes, so they don't get frustrated at an apparent lack of action.

As with any field, technical volunteers and consultants tend to use language and

vocabulary specific to their field, which can be confusing or frustrating to nontechnical people. They also might be unclear about what you do or how things work in your organization. Let them know that they might be talking over your head, but also be aware that you might be talking over theirs.

There are some other characteristics you are likely to encounter when working with a corporate volunteer or consultant. These generalizations have both a positive and negative side, so you will need to determine their potential effect on your volunteer relationship.

Accustomed to a fast pace

Your technical volunteer is probably accustomed to a quick turn-around and lots of resources to get the job done. The slower pace in a nonprofit or school might surprise a tech volunteer, and he or she may feel that the organization or staff person is not fully committed to the project. Clear communication about how things work at your office or school will help alleviate frustration from a volunteer who expects the project to move faster.

Results-oriented

One of our volunteers said he most enjoyed volunteering because he could see the immediate impact of his work. Unlike in a corporate environment, in which a techie's contributions might just help the business's bottom line, a nonprofit's core services can be improved drastically by his contribution. One volunteer's help in the classroom can transform a child's experience with technology. It's important to recognize and highlight the volunteer's impact, and help him or her see the real results of their time and expertise.

Willing to go the extra mile

Many technical volunteers are willing to do more than you ask for. This can be both a blessing (when they upgrade your network and help you get DSL) and a curse (when they upgrade your database software, then change the layouts so much that you don't know how to use it anymore).

More informed than you (about some stuff)

Obviously, you wouldn't need a technology volunteer if you knew how to do everything on your own. But it's hard to manage someone's work if they're donating their time and you don't understand everything they're doing. Even though a volunteer might know more than you about networks, applications and other technical issues, ultimately, you are the one who has to use the technology. Make sure you know what changes are being made, and make sure the volunteer checks in with you before making big decisions.

Liability issues: Maintaining security

Although these situations are unusual, you are responsible for the following:

- **Volunteer safety and liability in case of an on-site accident.**

- **Security of your organization's confidential information.** If you keep confidential information about your clients or donors, make sure you communicate to the volunteer what she or he can and cannot access. Before the project begins, determine exactly which passwords, computers and files the volunteer will need to access. After a volunteer or consultant is done working with confidential information, it's a good idea to change your passwords.

- **Staff and clients.** Careful screening will help maintain a safe environment. Communicate with your employees and clients so that they understand the volunteers' roles. Your organization can be liable for harassment of staff or clients by a volunteer. To protect your organization, you must have policies in place and enforce them. The U.S. Equal Employment Opportunity Commission offers information for employers that need to establish harassment policies.

- **Youth at your facility.** Technical volunteers may not have experience with kids or teens. If kids or teens are around while your volunteers are working, it's crucial that you communicate what is (and isn't) acceptable behavior for the volunteers when interacting with youth that participate in your programs. To prevent misunderstandings, be very clear about the rules regarding unsupervised, one-on-one contact.

Avoiding and addressing potential trouble spots

Volunteer is not responding

If the volunteer is not returning your calls or email, you may want to review how the project has been going up to this point. Doing this will provide clues as to what the problem might be and how to address it. If you find that more people in your office other than the liaison have been calling the volunteer, or if you've asked the volunteer to do more than the agreed-upon project, you may be scaring off the volunteer.

Technical professionals can sense when a project's getting too demanding of them and may respond by avoiding any contact. If this is the case, talk with the volunteer and let them know that you're aware of the problem, you would like to continue working with the volunteer and you will address this problem.

Volunteer is trying to sell goods or services

A volunteer may offer to sell his or her technical services or equipment to your organization. This can be a difficult situation, especially for a staff person who is unfamiliar with the technology being recommended. One way to avoid this situation is to set up clear expectations for the volunteer project. When the project is complete, you may choose to negotiate a paid arrangement.

Volunteer is not working out

Occasionally your organization may need to dismiss a volunteer. This is a particularly difficult situation because the volunteer probably had good intentions. The most common reasons for failure are personality conflicts and lack of skill, either on the part of a volunteer liaison or a technical volunteer.

Clarify ground rules about the relationship before the project begins in order to avoid misunderstandings. Some suggested ground rules include:

- The volunteer may refuse all or part of a project at any time.

- The volunteer liaison or other designated individual has the authority to terminate the arrangement.

- The volunteer should report any problems or concerns to the on-site coordinator as soon as possible.

- The volunteer liaison will approach the volunteer directly about any complaints or concerns regarding ability or performance.

- If the relationship must be terminated, a clear understanding of that fact should be made to everyone involved.

CHAPTER 4 AT A GLANCE

Key Points Recap

- As with any other volunteer projects, there's bound to be some preparatory work on the part of the organization before the technical volunteer can begin.

- It's a good idea to schedule a first meeting with your technical volunteer in order to get to know each other and discuss the project before work begins.

- During the project, be sure to check in with your volunteers on a regular basis. The staff liaison should communicate with volunteers on a regular basis to talk about their progress and find out if there are any problems or changes to the work plan.

- Volunteers must understand that even though they are giving their time away, it doesn't mean they can ignore agreements about the project.

- Some schools or nonprofits have their volunteers sign letters of commitment, and others rely on the volunteer's buy-in to keep them interested and coming back. Conversely, volunteers should feel comfortable setting limits on what they can do.

- When you bring in a volunteer or consultant who is used to working in the corporate world, you may have to orient them to nonprofit culture and circumstances, almost as if they were visiting another country.

- The key to a successful working relationship is explicit communication about what makes your agency's needs and processes different.

Your Chapter 4 Checklist

☐ **Schedule an initial meeting with your volunteer.** During this session, cover:
- Purpose of the class/lab/center/organization.
- Population or community you serve (bilingual students, homeless, people with disabilities).
- Main contacts for the volunteer (including on-site computer-literate people)
- Budget, if any (including computer budget).
- Purchasing process.
- Location of the phone, tools, sign-in/sign-out sheet, restroom, coffee, etc.
- Staff. In addition to making a significant contribution to an important cause, people volunteer to meet new people and to have fun.
- Work plan. Make sure both you and the volunteer understand the work to be done, the timeline and when you will next check in about progress.
- Your nonprofit context. This is particularly important if the volunteer has never worked with nonprofits before. Take some time to discuss the culture and processes of your workplace.

☐ **During the project, track the volunteer's progress and document all work.**
- Check in regularly with the volunteer.
- Maintain accountability.
- Have the volunteer keep a record of the work performed.

☐ **Close your project on a positive note.**
- Thank the volunteer once he or she has finished a project.
- Establish future communications.

☐ **Address potential trouble spots.** Areas to consider include:
- Volunteer is not responding.
- Volunteer is trying to sell goods or services.

☐ **Clarify ground rules about the relationship between the liaison and technical volunteer before the project begins in order to avoid misunderstandings.** Some ground rules include:
- The volunteer may refuse all or part of a project at any time.
- The volunteer liaison or other designated individual has the authority to terminate the arrangement.
- The volunteer should report any problems or concerns to the on-site coordinator as soon as possible.
- The volunteer liaison will approach the volunteer directly about any complaints or concerns regarding ability or performance.
- If the relationship must be terminated, a clear understanding of that fact should be made to everyone involved.

Appendix

We've created a number of tools to assist you with developing and managing technical volunteer projects. The following is a description of all the worksheets and resources you'll find in this section.

TOOL	DESCRIPTION	SEE APPENDIX
Worksheets to use before the volunteer project begins	• *Volunteer Project Guidelines* direct you through the information you need to write an effective Volunteer Job Description. The following sample projects are included in this section for your reference:	
	Technology Assessment, Assessing a Network, Building a Small Peer-to-Peer LAN, Building a Client Server Network, Troubleshooting Machines, Database Assessment, Database Training, Building a Rolodex Database, Building a New Web Site, Changing an Existing Web Site	Page 24 - 44
	• *Technology Inventory Worksheet* (optional) helps you take an inventory of your hardware and software. It's helpful to have this done before the volunteer project.	Page 54
Worksheets to use during the volunteer project	• *Technical Volunteer Questionnaire* collects all the skills of your new technical volunteer. Have your volunteer fill this out at the start of a new project.	Page 45
	• *Volunteer Contract* is a sample contract to demonstrate what a typical volunteer agreement could look like.	Page 49
	• *Volunteer Project Schedule* is a timeline for you and the volunteer to use to map out your volunteer project. We've included one that's filled out for you to use as a reference, as well as a blank one for your own projects.	Page 51
	• *Computer Maintenance Log* lets you discount any work done to workstations by the volunteer.	Page 53

Sample Project: Technology Assessment

What the volunteer can do:

A volunteer can provide a technology assessment for a small office that has a need for ten or fewer machines. Doing the assessment should involve looking at your existing hardware and software, interviewing staff about what their technology needs are, writing up a report of what you need to purchase, the cost and the timeline for implementation. (e.g., buy machines, then build a LAN).

What you need to do to prepare:

Do an inventory of the machines that you currently have.

If you need this for funding, or would like to use it to fund your technology plan, research the type of information that is required by the funder before working with the volunteer.

Fill out the following form as a guide to writing up a volunteer work plan to find someone to troubleshoot and fix problems with your computers:

1. What is the name and location of your organization?

   _____

   _____

   _____

2. What is the mission of your organization?

   _____

   _____

   _____

3. Check off the type of operating system(s) the computer(s) is running:

   ☐ Windows XP   ☐ Linux

   ☐ Windows Vista   ☐ Macintosh OS X

   ☐ Windows 2000   ☐ Other (please specify) _____

4. Is your computer on a network?

   ☐ Yes   ☐ No

5. If yes, check off which type of network:

☐ Peer-to-peer network ☐ Appleshare network ☐ Other (please specify)

☐ Windows 2000/2003 network ☐ Unix network

☐ Windows NT network ☐ Novell network

6. Who is the contact person for the project?

Name
_____

Phone number
_____

Email
_____

7. What is the best way to reach the contact person?

☐ Email ☐ Phone ☐ Both

8. When is the contact person available to work on the project?

_____

After you fill out this worksheet, you should write up a work plan that looks something like the following:

Volunteer Project: Technology Assessment

Do Good, an organization serving rural families, located in Springfield, is looking for a volunteer to do a technology assessment for an office of up to ten machines.

Will need volunteer to:

- Interview staff on technology needs
- Evaluate the following machines running on a Windows 2000 network: three Pentiums running Windows 2000 and one iMac
- Write a report detailing how Do Good should proceed with implementation, including cost and timeline

Do Good organization will:

- Provide access to all machines and software

We would like to finish this project within four months. Our availability to work with the volunteer is M-F after 5 and on occasional weekends. Please call Myra at (555) 512-8880 if you're interested.

PROJECT GUIDELINES WORKSHEET

Sample Project: Assessing a Network

What the volunteer can do:

A volunteer can assess what type of network best fits your organization's needs. This will include the cost for building a network and the required skills your staff will need to maintain it.

What you need to do to prepare:

Have a list of things you'd like your network to do (i.e., share a database or files)

- Do a network assessment

- Check with your landlord regarding laying cable

- Have the money set aside to purchase any needed equipment (like a hub or Ethernet cards)

Fill out the following form as a guide to writing up a volunteer work plan to find someone to troubleshoot and fix problems with your computers:

1. What is the name and location of your organization?

2. What is the mission of your organization?

3. Indicate the type and the number of computers using the following operating system(s):

_____	Windows 2000	_____	Macintosh OS 8
_____	Windows XP	_____	Macintosh OS 9
_____	Windows Vista	_____	Macintosh OS X
_____	Other	_____	Linux
_____			

4. Do you currently have a network?

☐ Yes ☐ No

5. If yes, check off all that apply:

☐ Peer-to-peer network ☐ Appleshare network ☐ Wireless (WiFi) network

☐ Windows 2000/2003 network ☐ Unix network ☐ Other (please specify)

☐ Windows NT network ☐ Novell network

6. Who is the contact person for the project?

Name
_____

Phone number
_____

Email
_____

7. What is the best way to reach the contact person?

☐ Email ☐ Phone ☐ Both

8. When is the contact person available to work on the project?

_____

After you fill out this worksheet, you should write up a work plan that looks something like the following:

Volunteer Project: Assessing a Network

Do Good, an organization serving rural familiies, located in Springfield, is looking for a volunteer to assess the type of network we need.

Will need volunteer to:

- Assess a network for the following machines: two Power Macs and three Pentium machines (one running Windows 2000 and two running Windows XP)
- Would like the network to be able to share a Filemaker database, files and possibly Internet access
- Write out a scope of work for the time it would take to build the network, as well as the cost of implementing and maintaining the server

Do Good organization will:

- Provide access to all machines and software

We would like to finish this project within three months. Our availability to work with the volunteer is M-F after 5 and on occasional weekends. Please call Wanda at (555) 512-8880 if you're interested.

Sample Project: Building a Small Peer-to-Peer Local Area Network (LAN)

What the volunteer can do:

A volunteer can build a peer-to-peer network of up to seven machines. They can install Ethernet cards, lay the cable (only if it doesn't involve drilling holes through walls and the like), clean the hard drives if necessary and make sure you have the appropriate hub.

What you need to do to prepare:

- Do a network assessment
- Check with your landlord regarding laying cable
- Have the money set aside to purchase any needed equipment (like a hub or Ethernet cards)

Fill out the following form as a guide to writing a volunteer work plan for building a small peer-to-peer network:

1. What is the name and location of your organization?

2. What is the mission of your organization?

3. Is the cable installed? (Caution! There are liablilities with this!)

☐ Yes   ☐ No

4. Are the machines Ethernet-ready?

☐ Yes   ☐ No

5. Check off the type of operating system(s) your computer(s) are running:

☐ Linux

☐ Other (please specify)

☐ Windows 2000 ☐ Macintosh OS X

☐ Windows XP ☐ Windows Vista

6. Who is the contact person for the project?

Name

Phone number

Email

7. What is the best way to reach the contact person?

☐ Email ☐ Phone ☐ Both

8. When is the contact person available to work on the project?

After you fill out this worksheet, you should write up a work plan that looks something like the following:

Volunteer Project: Building a Small Peer-to-Peer LAN

Do Good, an organization serving victims of domestic violence, located in Springfield, is looking for a volunteer to build a peer-to-peer network of up to seven machines.

Will need volunteer to:

- Build a peer-to-peer network for the following machines: five Windows 2000 machines, two Windows 98 machine and one Windows XP laptop
- Would like the network to be able to share a Filemaker database, files and Internet access
- Install Ethernet cards on two machines
- Recommend and purchase a switch and a wireless network access point
- Cabling will be in place
- Provide documentation of the network

Do Good organization will:

- Provide access to the machines

We would like to finish this project within three months. Our availability to work with the volunteer is M-W, 9 a.m.-7 p.m. and occasionally on weekends. Please call Buster at (555) 555-8880 if you're interested.

Sample Project: Building a Client Server Network

How the volunteer can help your organization:

A volunteer can build a client server network of up to ten machines. This means that they will be configuring the software for the network, like Windows 2003 or Linux. This takes a lot of time, so the machines should already be network-ready — that is, they should already have the cabling, Ethernet cards and hub.

CAUTION: These types of networks require ongoing maintenance by a trained network administrator. It's not something that you can rely on a volunteer for, nor can you easily tack it onto a current staff member's job duty. Realistically, you'll most likely need to hire a part-time network administrator or, at minimum, a consultant. Please consider these additional costs before deciding on this option.

What you need to do to prepare:

- Do a network assessment
- Have the computers network-ready (Ethernet cards, hub, cable)
- Have the money set aside to hire a consultant or staff to maintain the network

Fill out the following form as a guide to writing up a volunteer work plan to find someone to troubleshoot and fix problems with your computers:

1. What is the name and location of your organization?

   _____

   _____

   _____

2. What is the mission of your organization?

   _____

   _____

   _____

3. What type of network software do you want the volunteer to use to build the network?

   ☐ Windows 2000/2003 network   ☐ Unix network

   ☐ Apple X Server network   ☐ Novell network

   ☐ Other (please specify)

4. Is the cable installed? (Caution! There are liablilities with this!)

   ☐ Yes   ☐ No

5. Are the machines Ethernet-ready?

   ☐ Yes   ☐ No

6. Do you want a wireless (WiFi) network installed?

    ☐ Yes   ☐ No

7. Check off the type of operating system(s) your computer(s) are running:

    ☐ Windows XP   ☐ Linux

    ☐ Windows Vista   ☐ Macintosh OS X

    ☐ Windows 2000   ☐ Other (please specify)

8. Who is the contact person for the project?

    Name
    _____

    Phone number
    _____

    Email
    _____

9. What is the best way to reach the contact person?

    ☐ Email   ☐ Phone   ☐ Both

10. When is the contact person available to work on the project?

    _____

After you fill out this worksheet, you should write up a work plan that looks something like the following:

Volunteer Project: Building a Client Server Network

Do Good, an organization serving victims of domestic violence, located in Springfield, is looking for a volunteer to configure a Windows 2003 network of ten machines.

Will need volunteer to:

- Configure an NT network for the following machines: seven Windows 2000 machines, two Windows XP machines and one Mac OS X machine

- Would like the network to be able to share a Filemaker database, files and Internet access

- All machines are network-ready

- Cabling and a switch will be in place

- Purchase and install a wireless (WiFi) access point

- Provide documentation of the network

Do Good organization will:

- Provide access to the machines

We would like to finish this project within three months. Available to work with the volunteer M-W, 9 a.m.-7 p.m. and on occasional weekends. Please call Buster at (555) 555-8880 if you're interested.

PROJECT GUIDELINES WORKSHEET

Sample Project: Troubleshooting Machines

What the volunteer can do:

A volunteer can assess the problem that your machines are having and, time permitting, fix the machines. They can also recommend purchases and procedures for your organization that will minimize future problems.

What you need to do to prepare:

Have a record of what happens (i.e., machine freezes?), when it happens and what the user is doing when this occurs (i.e., opening up email). The best way to track this information is with the Troubleshooting Log, which you'll find in the Appendix.

Fill out the following form as a guide to writing up a volunteer work plan to find someone to troubleshoot and fix problems with your computers:

1. What is the name and location of your organization?

   _____

   _____

   _____

2. What is the mission of your organization?

   _____

   _____

   _____

3. Check off what you want the volunteer to do:

   ☐ Assess problem with the computer(s)

   ☐ Fix the problem with the computer(s)

   ☐ Recommend procedures/resources for you to use to fix the computer(s) in the future

4. Check off the type of operating system(s) your computer(s) are running:

   ☐ Windows XP   ☐ Macintosh OS X

   ☐ Windows Vista   ☐ Linux

   ☐ Windows 2000   ☐ Other (please specify)

5. Is your computer on a network?

   ☐ Yes   ☐ No

6. If yes, check off which type of network:

   ☐ Peer-to-peer network   ☐ Appleshare network   ☐ Apple OS X network

   ☐ Windows 2000/2003 network   ☐ Unix network   ☐ Other (please specify)

   ☐ NT network   ☐ Novell network

8. Who is the contact person for the project?

Name

Phone number

Email

9. What is the best way to reach the contact person?

☐ Email   ☐ Phone   ☐ Both

10. When is the contact person available to work on the project?

After you fill out this worksheet, you should write up a work plan that looks something like the following:

Volunteer Project: Troubleshooting Machines

Do Good, an organization serving rural families, located in Littleton, is looking for a volunteer to troubleshoot problems that our machines are having.

Will need volunteer to:

- Troubleshoot an iMac on a Windows 2000 network that crashes while printing
- Troubleshoot a Windows XP machine on a Windows 2000 network that freezes at shutdown
- Time permitting, fix machines or offer suggested next steps

Available to work with the volunteer M-F after 5 p.m. and occasionally on weekends. Please call Wilma at (555) 555-8880 if you're interested.

PROJECT GUIDELINES WORKSHEET

Sample Project: Database Assessment

What the volunteer can do:

A volunteer can help you with a database assessment, an important part of building a database.

What you need to do to prepare:

You'll need a tool to guide you through the process. There is a helpful database-planning guide that you can download from www.TechSoup.org. This workbook will walk you through all of the prepration that you'll need to do before meeting with your volunteer.

Fill out the following form as a guide to writing up a volunteer work plan to find someone to assess your database needs:

1. What is the name and location of your organization?

2. What is the mission of your organization?

3. What will you be using the database for?

4. Check off the type of operating system(s) your computer(s) are running:

☐ Windows XP   ☐ Macintosh OS X

☐ Windows Vista   ☐ Linux

☐ Windows 2000   ☐ Other (please specify)

5. Is your computer on a network?

☐ Yes   ☐ No

6. If yes, check off which type of network:

☐ Peer-to-peer network   ☐ Appleshare network   ☐ Apple X Server network

☐ Windows 2000/2003 network   ☐ Unix network

☐ NT network   ☐ Novell network

7. Who is the contact person for the project?

Name
Phone number
Email

8. What is the best way to reach the contact person?

☐ Email ☐ Phone ☐ Both

9. When is the contact person available to work on the project?

_____

After you fill out this worksheet, you should write up a work plan that looks something like the following:

Volunteer Project: Database Assessment

Do Good, an organization serving rural families, located in Littleton, is looking for a volunteer to assess the type of database they need to track their clients.

Will need volunteer to:

- Assess their needs for a shared database running on a Windows 2003 network that will track their clients
- Write up a database plan using TechSoup's database-planning workbook, which we'll provide

Do Good will provide:

- All information for the assessment

Available to work with the volunteer M-F after 5 p.m. and occasionally on weekends. Please call Betty at (555) 555-8880 if you're interested.

Sample Project: Database Training

What the volunteer can do:

A volunteer can provide you with training on how to use an existing database or how to make simple changes. They can also train you on how to build a simple database.

What you need to do to prepare:

You'll need, of course, to know what type of database that you'd like to have training on.

If the training is for a group of people, you'll need to find out what day of the week are they available for training and a room to hold the training in.

Fill out the following form as a guide to writing up a volunteer work plan to find someone to train you on your database:

1. What is the name and location of your organization?

   _____

   _____

   _____

2. What is the mission of your organization?

   _____

   _____

   _____

3. What do you want to learn?

   _____

   _____

   _____

4. What type of database software are you using?

   ☐ Access

   ☐ Filemaker Pro

   ☐ Microsoft SQL Server

   ☐ Other (please specify) _____

5. Check off the type of operating system the computer is running:

   ☐ Windows XP   ☐ Macintosh OS X

   ☐ Windows Vista   ☐ Linux

   ☐ Windows 2000   ☐ Other (please specify)

6. Is your computer on a network?

☐ Yes   ☐ No

7. If yes, check off which type of network:

☐ Peer-to-peer network   ☐ Appleshare network   ☐ Apple X Server network

☐ Windows 2000/2003 network   ☐ Unix network   ☐ Other (please specify)

☐ NT network   ☐ Novell network

8. Who is the contact person for the project?

Name

Phone number

Email

9. What is the best way to reach the contact person?

☐ Email   ☐ Phone   ☐ Both

10. When is the contact person available to work on the project?

After you fill out this worksheet, you should write up a work plan that looks something like the following:

Volunteer Project: Database Training

Do Good, an organization serving rural families, located in Littleton, is looking for a volunteer to train a staff member on how to best use their Access catabase running on a Windows 2000 network.

Will need volunteer to:

- Train staff member on how to do finds and run reports
- Train staff member on how to make simple changes to layouts
- Train staff member on how to do mail merges with Word and also how to print up mailing labels

Do Good will provide:

- Information for the assessment, including reports, and will make sure that all necessary staff are available to work with the volunteer

Available to work with the volunteer M-F after 5 p.m. and on occasional weekends. Please call Betty at (555) 555-8880 if you're interested.

Sample Project: Building a Rolodex Database

What the volunteer can do:

A volunteer can build a simple rolodex-type database, which is basically a database that holds contact information for individuals. Building anything bigger than this is too complex for a volunteer project. Besides, databases are vital to an organization and worth the investment of hiring a consultant.

What you need to do to prepare:

Do a database assessment.

Fill out the following form as a guide to writing up a volunteer work plan to find someone to build your rolodex-style database:

1. What is the name and location of your organization?

   _____

   _____

   _____

2. What is the mission of your organization?

   _____

   _____

   _____

3. What type of database software do you want the volunteer to use?

   ☐ Access

   ☐ Filemaker Pro

   ☐ SQL

   ☐ Other (please specify) _____

4. Check off the type of operating system the computer is running:

   ☐ Windows 95   ☐ Macintosh OS 8   ☐ Linux

   ☐ Windows 98   ☐ Macintosh OS 9

   ☐ Windows 2000   ☐ Macintosh OS X

5. Do you currently have a network?

   ☐ Yes   ☐ No

---

6. If yes, check off which type of network:

☐ Peer-to-Peer network ☐ Appleshare network

☐ Windows 2000 network ☐ Unix network

☐ NT network ☐ Novell network

7. Who is the contact person for the project?

Name

Phone number

Email

8. What is the best way to reach the contact person?

☐ Email ☐ Phone ☐ Both

9. When is the contact person available to work on the project?

After you fill out this worksheet, you should write up a work plan that looks something like the following:

Volunteer Project: Building a Rolodex Database

Do Good, an organization serving rural families, located in Littleton, is looking for a volunteer to build a simple database that will hold names and addresses of families using FileMaker Pro on a Power Mac.

Will need volunteer to:

- Build database

- Train staff member on how to make simple changes to layouts

- Train staff member on how to do mail merges with Word and also how to print up mailing labels

Available to work with the volunteer M-F after 5 p.m. and on occasional weekends. Please call Barney at (555) 555-8880 if you're interested.

Sample Project: Building a New Web Site

What the volunteer can do:

A volunteer can build a brochure-style (five- to seven-page) Web site for your organization. Be aware, though, that a Web site is not a static project. Once it's built, it'll need ongoing maintenance to ensure the information is current. Don't count on the volunteer to do this for you. Ideally, a staff person should be trained to update the site.

What you need to do to prepare:

- Do an assessment of your Web site needs.

- Have content for the site ready for the volunteer.

Fill out the following form as a guide to writing up a volunteer work plan to find someone who can help you build a Web site:

1. What is the name and location of your organization?

   _____

   _____

   _____

2. What is the mission of your organization?

   _____

   _____

   _____

3. Do you need for the volunteer to recommend an ISP to host your Web site?

   ☐ Yes   ☐ No

4. Do you have a domain name?

   ☐ Yes   ☐ No

5. Do you have graphics for the site?

   ☐ Yes   ☐ No

6. Do you have content for your site?

   ☐ Yes   ☐ No

7. Do you want the volunteer to train you to maintain the site?

   ☐ Yes   ☐ No

8. What type of software do you want the Web site built in?

☐ Front Page

☐ Dreamweaver

☐ Other (please specify) _____

9. Indicate the type of computer you are using:

☐ PC   ☐ Mac

10. Who is the contact person for the project?

| Name |
| Phone number |
| Email |

11. What is the best way to reach the contact person?

☐ Email   ☐ Phone   ☐ Both

12. When is the contact person available to work on the project?

_____

After you fill out this worksheet, you should write up a work plan that looks something like the following:

Volunteer Project: Building a New Web Site

Do Good, an organization serving inner-city youth, located in Gotham City, is looking for a volunteer to build a five- to seven-page, brochure-style Web site.

Will need volunteer to:

- Build the site using Dreamweaver
- Create graphics for the site
- Recommend an ISP to host the site
- Secure a domain name for the site
- Train a staff person on maintaining the site using Dreamweaver on a Mac

Do Good organization will:

- Provide content for the site
- Have three or four sites picked out that they would like their site to look like
- Have flexible availability to work with the volunteer

Please call Karen at (555) 512-8888 ext. 307 if you're interested.

Sample Project: Changing an Existing Web Site

What the volunteer can do:

Within reason, a volunteer can make additions to your current site. For instance, a volunteer can help you set up a "donation page" on your Web site, but they most likely can't set up a page that connects to your donor database to track donations from the Web site. This type of functionality requires more time than is appropriate for a volunteer project.

A volunteer can add functionality to your existing site, such as:

- Adding new graphics
- Adding new pages
- Setting up a donation link
- Improving the look and feel of your current site

You can still work with a volunteer to do more complex additions to the site. Anything complex requires an evaluation of your site and what's needed to implement the desired function. Volunteers can help you in this regard. Some sample assessments could be:

- Improving the informational architecture of the current site
- Adding advanced features, like bulletin boards and chat rooms

What you need to do to prepare:

- Do an assessment of your Web site needs.
- Have content for the site ready for the volunteer.
- Have example sites to show the volunteer what you'd like to do with your existing site.

Fill out the following form as a guide to writing up a volunteer work plan to find someone to help you change your existing site:

1. What is the name and location of your organization?

2. What is the mission of your organization?

3. Do you need for the volunteer to recommend an ISP to host your Web site?

    ☐ Yes   ☐ No

4. Do you have graphics for the site?

    ☐ Yes   ☐ No

5. Do you have the content for your site?

☐ Yes   ☐ No

6. Do you want the volunteer to train you to maintain the site?

☐ Yes   ☐ No

7. What is your domain name? _____ (http://www.websitename.org)

8. What is it that you want your site to do that it's not doing?

☐ Add more graphics

☐ Add more pages

☐ Evaluate current site

☐ Add donor link

☐ Assess how to add more functionality, like chat rooms or bulletin boards

9. What type of software do you want the Web site built in?

☐ Front Page

☐ Dreamweaver

☐ Drupal

☐ Joomla

☐ WordPress

☐ Page Mill

☐ Other (please specify) _____

10. Indicate the type of computer you are using:

☐ PC   ☐ Mac

11. Who is the contact person for the project?

Name
_____

Phone number
_____

Email
_____

12. What is the best way to reach the contact person?

☐ Email   ☐ Phone   ☐ Both

13. When is the contact person available to work on the project?

_____

After you fill out this worksheet, you should write up a work plan that looks something like the following:

Volunteer Project: Changing an Existing Web Site

ChildrenFirst, an organization serving inner-city youth, located in Gotham City, is looking for a volunteer to evaluate our existing Web site (www.boguswebsite.org).

Will need volunteer to:

- Recommend improvements to site navigation
- Recommend improvements to site graphics
- Recommend a way to accept donations on the site

ChildrenFirst will:

- Have three or four sites picked out that they would like their site to look like
- Have flexible availability to work with the volunteer

Please call Karen at (555) 512-8888 ext. 307 if you're interested.

Technical Volunteer Questionnaire

CONTACT INFORMATION

Name			
Address			
City	State	Zip	
Occupation/Employer			
Phone			
Email			
URL/Facebook/LinkedIn			

OPERATING SYSTEM SKILLS

Please describe your familiarity with the following operating systems, and indicate your level of experience:

OS	Beginner	Intermediate	Advanced
☐ Windows 95/98/ME	☐	☐	☐
☐ Windows 2000	☐	☐	☐
☐ Windows XP/Vista	☐	☐	☐
☐ Macintosh OS 8/9/X	☐	☐	☐
☐ Unix/Linux	☐	☐	☐
☐ Other (please specify)	☐	☐	☐

NETWORK SYSTEM SKILLS

Please describe your familiarity with the following network systems, and indicate your level of experience:

Network System	User	Administrator	Setup & Admin
☐ Appleshare network	☐	☐	☐
☐ Novell network	☐	☐	☐
☐ Peer-to-peer	☐	☐	☐
☐ Unix/Linux	☐	☐	☐
☐ Windows (2000/2003 or NT)	☐	☐	☐
☐ Apple OS X Server	☐	☐	☐
☐ Other (please specify)	☐	☐	☐

NETWORK SETUP SKILLS

Please indicate which of the following you have experience with:

Network System

☐ Firewalls ☐ Wide area networks (WANs) ☐ Remote access

☐ Pulling cable ☐ Connecting LANs to the Internet ☐ Wireless (WiFi)

☐ Peer-to-peer ☐ Broadband routers (for cable/DSL) ☐ Voice over IP

☐ Other (please specify)

TRAINING

Please select the options that describe your training skills:

☐ Tutoring ☐ Group training ☐ Developing training materials

☐ Online training/Webinars ☐ Other (please specify)

HARDWARE SKILLS

Please describe your familiarity with the following hardware environments and your skill level:

Platform	*Basic Troubleshooting*	*Thorough Troubleshootling or Repair*
☐ PCs	☐	☐
☐ Macs	☐	☐
☐ Servers	☐	☐

Please select all the word processing programs you have experience using:

☐ Open Office ☐ Microsoft Word ☐ WordPerfect

Please select all the spreadsheet programs you have experience using:

☐ Open Office ☐ Excel ☐ Quattro Pro

☐ Numbers

Please select the accounting programs you have the most experience using:

☐ Acc Pac ☐ Great Plains ☐ MYOB

☐ QuickBooks ☐ OneWrite Plus ☐ Peachtree

☐ Quicken ☐ SBT ☐ Microsoft Money

WEB/INTERNET/TELECOMMUNICATIONS

Do you have experience installing or maintaining these types of connections to the Internet?

☐ Cable Internet access ☐ ISDN ☐ Dial-up modem

☐ DSL ☐ T1

Please select any options that describe your experience creating Web sites:

- ☐ Basic page layout
- ☐ Adv. HTML/Scripting
- ☐ Web application development

- ☐ Site design
- ☐ Site administration

- ☐ Marketing the site
- ☐ E-commerce needs assesment

Check any Web tools you are familiar with:

- ☐ Page Mill
- ☐ Front Page
- ☐ Home Site

- ☐ Flash
- ☐ Go Live
- ☐ Debabalizer

- ☐ Image Ready
- ☐ Dreamweaver
- ☐ BBedit
- ☐ Other _____

Please check any Web site "back-end" skills:

- ☐ Programming lanaguages
- ☐ Web server setup
- ☐ Database integration

The following is a list of software and/or languages that might be used for back-end Web site development and maintenance. Please check those that you have used:

- ☐ Java
- ☐ Perl
- ☐ Cold Fusion
- ☐ ASP

- ☐ PHP
- ☐ JavaScript
- ☐ Ruby on Rails
- ☐ Other _____

EMAIL

Please indicate ways in which you can assist nonprofits with their email accounts/setup:

- ☐ Set up email server
- ☐ Set up a mailling list
- ☐ Moderate mailing lists

Please check which email applications you are familiar with:

- ☐ Lotus Notes
- ☐ Microsoft Exchange
- ☐ Eudora

- ☐ Outlook
- ☐ Thunderbird
- ☐ Web mail applications

DATABASES/PROGRAMMING

Would you feel comfortable assessing a group's database needs?

- ☐ Yes
- ☐ No

Please select the databases you have the most experience *using*:

- ☐ Microsoft Access
- ☐ MySQL
- ☐ Visual Fox Pro
- ☐ Sybase

- ☐ Microsoft SQL Server
- ☐ FileMaker Pro
- ☐ 4th Dimension
- ☐ Other ____

- ☐ Oracle
- ☐ PostgreSQL
- ☐ Q&A

Please select the databases you have the most experience *programming*:

- ☐ MS Access
- ☐ MySQL
- ☐ Visual Fox Pro
- ☐ Sybase

- ☐ MS SQL server
- ☐ FileMaker Pro
- ☐ 4th Dimension
- ☐ Other ____

- ☐ Oracle
- ☐ PostgreSQL
- ☐ Q&A

Do you have experience modeling and designing organizational database systems?

☐ Yes ☐ No

Do you have experience building, modifying or maintaining membership, information and referral or donor databases typically used by nonprofits?

☐ Yes ☐ No

DESKTOP PUBLISHING/MULTIMEDIA/GRAPHICS APPLICATIONS

Please select each area that you have the most skills to offer a school or group:

☐ Animation ☐ Graphics ☐ Desktop publishing

☐ Digital imaging ☐ Audio production ☐ Video production

Please select the *desktop publishing* programs that you have the most experience using:

☐ Pagemaker ☐ Publisher ☐ Quark XPress

☐ InDesign ☐ Pages ☐ Scribus ☐ Other _____

Please select the *graphics* applications that you have the most experience using:

☐ Corel Draw! ☐ Inkscape ☐ Freehand

☐ Illustrator ☐ Photoshop ☐ GIMP ☐ Other _____

Please select the *presentation* applications that you have the most experience using:

☐ Keynote ☐ Powerpoint ☐ Open Office

IN CONCLUSION...

Please list the languages you are comfortable with, other than English:

How did you hear about us?

Have you volunteered your tech skills before? If so, where?

Please list two references and their contact information (phone or email):

Volunteer Contract

_____(name of volunteer) and _____
(name of agency) agree to combine their resources, intelligence and energy to enter into the following agreement with the following responsibilities:

AGENCY'S RESPONSIBILITIES

1. Develop and agree to a work plan.

2. Identify an agency liaison.

3. Communicate with volunteer on a regular basis.

4. Complete project with volunteer within _____ months.

5. Thank the volunteer.

VOLUNTEER'S RESPONSIBILITIES

1. Review and agree to the agency's work plan.

   - Review the Volunteer Contract, which includes the agency work plan.

   - Agree to complete the work plan in the timeline specified.

2. Communicate with agency staff:

   - Alert the agency liaison early on in the match about potential problems.

   - Update the agency liaison when project objectives are completed.

   - Inform the agency liaison if you will not be able to complete the project.

3. Complete the work plan within _____ months.

TERMS OF AGREEMENT

Services under this agreement shall begin _____ and end _____ months after.

WORK PLAN

_____ (name of organization) will receive the following work:

(Insert work plan below)

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

CONDITIONS

The outlined due dates will be met if all parties adhere to the outlined schedule. If _____ (volunteer) needs more time to complete the scope of work, the due date(s) for the remaining activities will be delayed.

The following parties have accepted and signed this agreement on these dates.

_____

Agency   Date

_____

Volunteer   Date

Volunteer Project Schedule: *Sample*

OVERALL PROJECT GOAL

_____

_____

Example: Develop a Web site plan that is feasible for budget and staffing. Draft site architecture and page layout. Make recommendations regarding Web site hosting, training and software needs.

OVERALL PROJECT DEADLINE _____ *(EXAMPLE: OCTOBER 31 200X)*

TASK	START/END DATES	PERSON RESPONSIBLE
List all the steps needed to reach your goal.	*When can both parties accomplish this task?*	*Who is the primary person responsible for this taks?*
Example: Meet to discuss Web site goals, project budget and deadlines. Discuss staff person's skill level and training needs.	August 1	Staff members and volunteer
Gather materials for Web site (text, images).	August 1-15	Staff Member
Research Web hosting accounts and prices.	August 1-15	Volunteer
Draft Web site architecture and sketch page layouts.	August 15-September 15	Volunteer
Give feedback on site architecture and page layouts.	September 15-21	Volunteer
Incorporate feedback in architecture and layouts.	September 21-October 7	Volunteer
Recommend Web site solutions appropriate for organization's budget and staffing. Recommend software and/or training needed. Document recommendations.	Project end date October 30	Volunteer

Volunteer Project Schedule

OVERALL PROJECT GOAL

_____

_____

OVERALL PROJECT DEADLINE _____

TASK	START/END DATES	PERSON RESPONSIBLE
List all the steps needed to reach your goal.	_When can both parties accomplish this task?_	_Who is the primary person responsible for this taks?_

Computer Maintenance Log

DATE	WORKSTATION OR STAFF MEMBER	PROBLEM TO BE SOLVED	CONSULTANT NAME & CONTACT INFO	WORK DONE	COMMENTS (OR ADDITIONAL WORK NEEDED)

Technical Inventory: *Computer Hardware*

Date: _____

WORKSTATION NAME (USER)	MAIN USER/LOCATION	SERIAL # OR ASSET TAG #	SYSTEM AND RAM	PERIPHERALS	SOFTWARE	PROBLEM/NOTES