Real-World Advice for Creating a
Successful Team-Based Volunteering Program

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INTRODUCTION

Organizations often rely on individual volunteers to provide a wide variety of services, including event staffing, accounting, and even strategic consulting. Sometimes, however, individual volunteers just are not enough. Some jobs, such as developing a web site, building a donor database, or launching a major marketing campaign, require teams. In the past, organizations seeking help with large jobs had no choice but to hire a professional services company. Today, however, an increasing number of organizations are using *team-based volunteer programs* to deliver an increasing variety of broad, complex services.

As the name implies, a team-based volunteer program organizes a group of skilled professionals into a team. The team is assigned a specific project, and each team member is assigned a specific role. The team is led by an experienced project manager, who uses a project plan to guide the team through the various phases of the project, which may last several months or more.

Team-based volunteer projects can be very attractive to volunteers for numerous reasons. For one thing, they are inherently social. It is well-known that one of the reasons many people volunteer is to meet other people, and team-based volunteer projects are a great way to do this. In addition, team-based volunteer projects offer valuable networking and career

development opportunities, as volunteers interact with and learn from other skilled professionals on their team. And finally, team-based volunteer projects help communicate to professionals that their time will be well-spent. Individuals who may be hesitant to volunteer for fear of getting stuck on an ill-defined project that goes on forever will be reassured by the presence of project managers and project plans.

CHALLENGES OF MANAGING A TEAM-BASED VOLUNTEER PROGRAM

While team-based volunteer programs have many merits for both organizations and volunteers, they can be demanding in terms of management. In particular, they require organizations to overcome three key challenges.

The first major challenge involves staffing teams. This entails screening volunteers and assigning them to specific roles. Many organizations may not have the expertise to accurately assess whether volunteers have the right professional credentials and capabilities to fulfill these highly specialized roles. For example, consider an organization that wants to use a volunteer team to build a web site. This organization may likely know that it will need a web designer, a web developer, and a copywriter on the team, but may not realize that it should also have a marketing expert as well as a project manager to coordinate the overall

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The Taproot Foundation, launched in 2001, is redefining volunteering by combining the efficiencies of traditional volunteer matching services with the quality management practices of leading business consulting firms. The result is the ability to assign volunteers to the most appropriate projects based on their skills and to ensure the timely delivery of quality professional services.

effort. Further, the organization may not know how to assess the web developer's technical expertise, or the marketer's experience with interactive technologies. These kinds of oversights or knowledge gaps will often lead to major problems as a team-based volunteer project progresses.

The second major challenge involves defining project scope and requirements. Consider again the organization trying to build a web site, perhaps to communicate its capabilities to clients or its value proposition to donors. It is common for this type of organization to dramatically expand its requirements once a project in underway. For example, the organization might decide midway through the project that it wants to include an events calendar, or a password-protected section of the site. Complex changes such as these can dramatically lengthen project scope, which in turn, can frustrate volunteers. Once this starts to occur, a project will often begin to derail entirely.

The third major challenge involves retaining team members. Organizations must pay special attention to the interactions between team members and must work constantly to ensure that team members cooperate, respect each other, and remain engaged in the project. Organizations must also pay close attention to potential issues, such as sexual harassment or cultural differences, that can occur within a team and affect team member productivity. To prevent these types of problems from causing volunteers to defect, organizations should begin each volunteer project with an orientation session to explain what type of behavior is allowed and what type is not permitted. Also during this session, organizations should explain the escalation path used to resolve all issues and should make sure that volunteers know who to contact in the event of a problem.

LEARNING FROM SUCCESS

While these management challenges may seem daunting, organizations can learn to overcome them successfully by studying the project and team management techniques used by today's leading corporations, particularly those within the professional services

industry (e.g. advertising agencies, law firms, etc.). This exercise will reveal that most successful corporations do two key things. First, they hire excellent project managers and rely on them extensively. Second, they put in place a repeatable project management process and allow project managers to improve that process over time, based on real experience. By emulating these two actions, volunteer program managers can greatly enhance the chances that their team-based volunteer programs will be successful.

THE IMPORTANCE OF PROJECT MANAGEMENT

It is essential that organizations find excellent project managers to lead their team-based volunteering projects. Project managers perform a number of critical functions, including:
1. Translating an organization's vision for a project into specific requirements and deliverables that the project team can understand and deliver.
2. Determining what skills a project will require and what number and type of individuals will be needed.
3. Tapping into professional networks to help recruit additional volunteers for an organization.
4. Building a realistic project plan and using that plan to anticipate and avoid cost overruns or time delays well before they occur.
5. Helping an organization circumvent or mitigate the numerous pitfalls, such as volunteer defection, that can derail even well designed professional services projects.

Project managers must have experience managing the type of project they are to lead. Inexperienced project managers generally do not have the necessary technical or subject matter expertise to manage a large-scale professional services project and often underestimate the complexity of the task. If an organization lacks the right kind of project manager, it must seek a project manager from outside the organization.

Ideally, project managers should be hired,

but for organizations with small staffs and small budgets, volunteer project managers are the only realistic option. Volunteer project managers can be found by asking board members for referrals, working with local volunteer centers, approaching local corporations and professional associations, and posting help wanted ads on community web sites. A good example of one such community web site is www.craigslist.org, which is available in 18 major metropolitan areas and allows users to post want ads free of charge. Other good web sites include www.idealist.org and www.volunteermatch.org.

When evaluating project management candidates, some of the key criteria to consider are experience, personality, and cultural fit. Ideally, organizations should select candidates who have at least three years of general project management experience, as well as at least one year of experience managing the specific type of project to be conducted. In terms of personality, optimism, energy, and charisma are essential since project managers will be responsible for motivating the rest of the volunteer team. Lastly, it is important for organizations to ensure that their project managers are good cultural fits. One good way of checking this is to ask candidates to state their expectations for how decisions will get made and how much time all interested individuals will spend on the project. Candidates who disagree with the organization about these issues are not likely to be good cultural fits and should probably be passed over, even if they have the right experience and personality.

IMPLEMENTING THE RIGHT PROCESS

Finding a core group of skilled project managers is a critical step for any organization seeking to establish a team-based volunteer program, but it is equally important for the organization to put in place the right process for project managers to follow. This

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process should consist of the following five major project phases.

1. Definition — It is crucial for organizations to create at the outset of each team-based volunteering project a list of requirements and desired outcomes. Project managers can aid in this process, but additional organizational involvement (especially at the board level) will always be required. Questions to answer during the Definition phase include:

- What are specific deliverables of the project?
- Why do we need these deliverables?
- How long will it take to produce these deliverables?
- What interim milestones can we establish to measure the progress of the project?
- What will be the cost for the deliverables?
- What type of staffing does the project require?
- Who is responsible for the project?
- How will the project's success be measured?
- How will we know when the project is complete?

2. Staffing — Once a team-based volunteering project has been defined, it is time to recruit and screen volunteers. One effective way for organizations to recruit volunteers is to establish ongoing relationships with local corporations and volunteer centers. Project managers should also help recruit volunteers and should play a central role in screening candidates and assigning them to particular roles.

3. Management — Before project delivery begins, an organization needs to determine which senior manager within the organization is ultimately accountable for

the project, and who is responsible for managing the project manager (this will often be the same person, but not always). These are critical responsibilities. Even though the project manager will perform most of the day-to-day management tasks, at least one senior manager needs to remain intimately involved in every project. This entails attending periodic project update meetings and spending time with volunteers to express direct appreciation for the work that is being performed.

4. Knowledge Transition — Once project work is complete, there needs to be a clean transition of both knowledge and tools from the volunteer team to the staff of the organization. A good transition will ensure that the organization knows how to benefit from the project deliverables and understands how to modify them if necessary in the future. For example, at the end of a web development project, volunteers should train the organization how to maintain and update the web site and should transfer to the organization all project-related documentation and assets, such as image files. While transition requires some additional effort on the part of the volunteers, the extra time spent can save the organization valuable time in their day-to-day operations and allow them to focus on their mission. It can also save the volunteer from having to come back and fix small glitches or make minor changes.

5. Assessment — After a project is complete, it is imperative that the organization spend at least an hour meeting in person with all members of the volunteer team, especially the project manager, to discuss how the project worked and identify opportunities to improve the process. This meeting is also a great opportunity for the organization to recognize great volunteers. Organizations that wish to maintain relationships with star volunteers may want to ask them to serve on an ongoing committee that assesses the organization's volunteer needs and programs and helps

attract other volunteers and project managers.

CONCLUSION

Team-based volunteer programs offer organizations an effective way to procure the kind of large-scale professional services that most organizations need but cannot afford. Organizations seeking to create a team-based volunteer program should concentrate on devoting resources up-front to recruiting experienced project managers and implementing a sound project management process. They should also continue to study the best practices (and pitfalls) of successful professional services companies[1]. By following these steps, organizations can create a team-based volunteering program that delivers high-impact, professional services at relatively low cost.

REFERENCES
The UPS Foundation, Managing Volunteers, 1998.
Cathleen Wild, *Corporate Volunteer Programs, Benefits to Business*, report 1029 (New York: The Conference Board, 1993), 35

ENDNOTE
[1]Several leading business journals, including *Knowledge @ Wharton, The Harvard Business Review*, and *The McKinsey Quarterly*, regularly publish articles describing project management best practices and pitfalls from the private sector. Gartner (www.gartner.com) is also a good resource, especially for articles about managing technology projects. Finally, The Project Management Institute (www.pmi.org) offers a wealth of information about project management, as well as a community web site for registered visitors to exchange information with each other.