

2024 NONPROFIT LEADERSHIP CONFERENCE



May 8, 2024
Minneapolis



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Volunteers at the Compass Twin Cities end-of-project celebration in 2023



Turning One-Time Volunteers into Lifelong Organizational Champions

May 8, 2024

Welcome and Introductions

Mary Uran

Managing Director - Twin Cities @ Compass Pro Bono



About Compass Pro Bono



Compass staff participating in a staff retreat improv workshop (2023)



Volunteers at Compass Greater Philadelphia's 10-year anniversary (2023)

Our Mission

Compass Pro Bono forges lasting ties between local nonprofits and local business professionals to empower thriving, equitable, resilient communities.

Our Vision

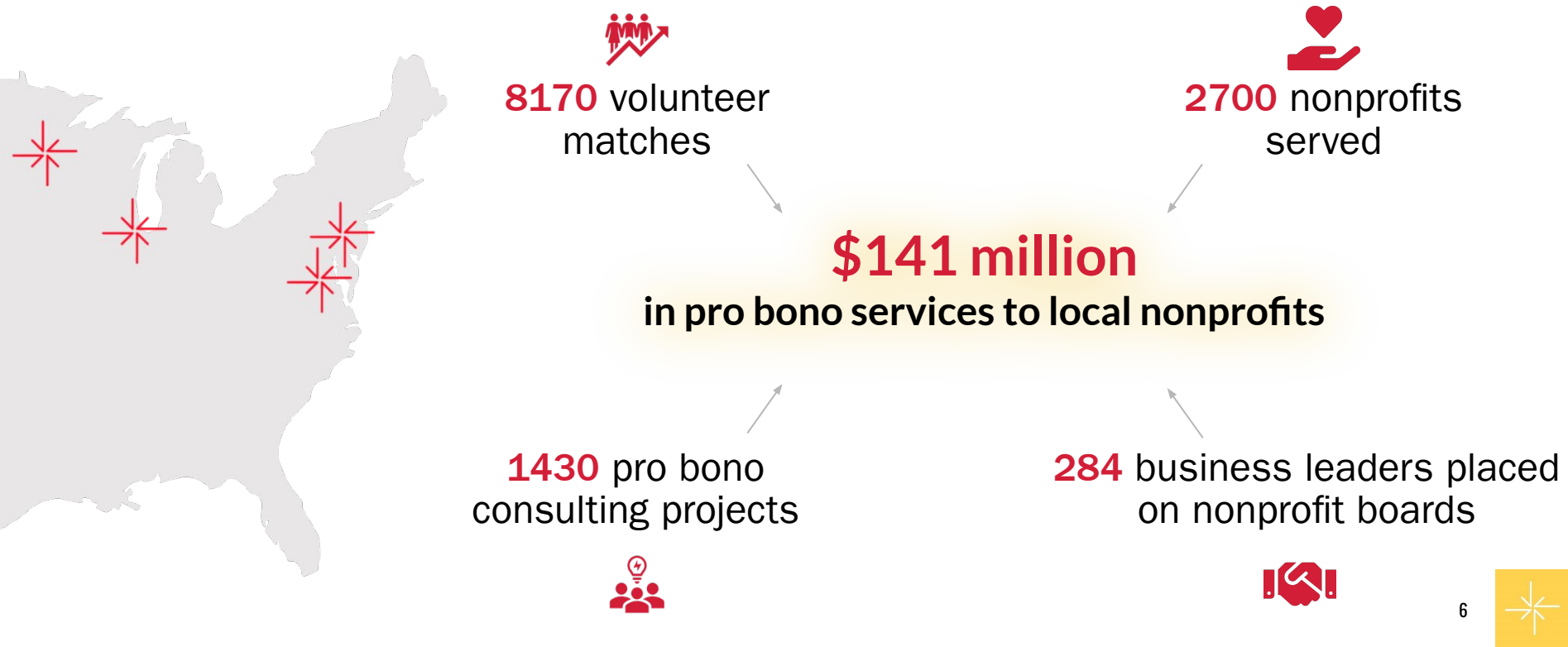
Deeply interconnected communities.

How We Deliver

Through pro bono business consulting and board matching / training for local nonprofits.



23 years of impact



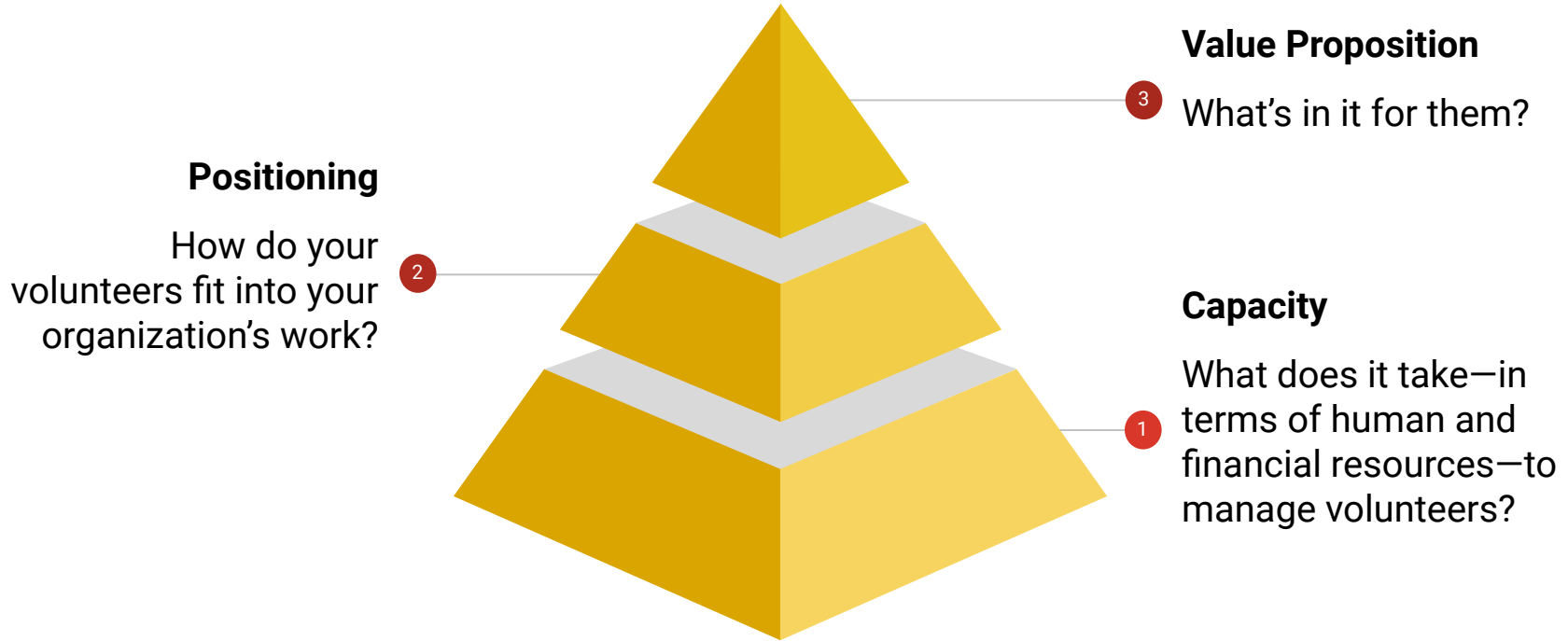
What we will cover today

- The basics of leveraging volunteers
- Core principles: making it easy for your volunteers to volunteer
- 5 tested strategies for working with volunteers to keep them coming back
- Making it sustainable: relationship-building and data collection

TODAY'S GOAL: you will walk away confident in how to deploy up to five tangible strategies for building a strong volunteer base, no matter what your mission is.



Getting back to the basics



Why volunteering?



Why volunteering? (the nonprofit angle)

POSITIONING: What's the value to nonprofits?

- added capacity to make progress on mission
- automatic organizational champions / resource magnets
- potential donor pipeline

“The outside and in-depth analysis of our program gave us a new perspective on how to engage our donors and potential partners.”

“Our Compass project helped transform the entire organization.”

“There are no words to describe the value of having a group of exceptional humans dive deep into the workings of our non-profit but also the heart of our mission.”



Why volunteering? (the volunteer angle)

VALUE PROPOSITION: What's the value to volunteers?

- opportunity to give back to community
- possibility of learning about an issue area or practicing a skill
- social and/or professional networking

“If my work on nights and weekends with Compass and the client prevents one family from being evicted, **any amount of my time is more than worth it.**”

“Compass has supported my professional development by allowing me to refine my **project management skills.**”

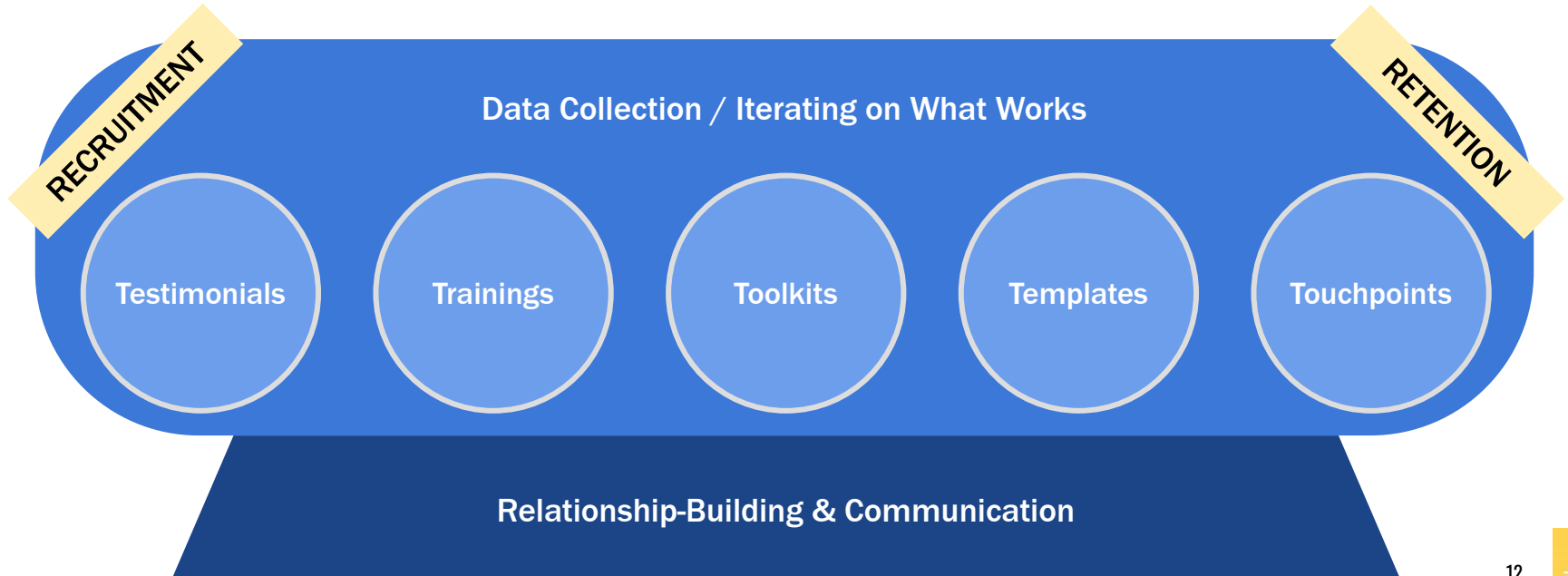
“On a personal level, my projects have provided me with a vehicle to learn and **get closer to issues I care deeply about**, like the wealth gap.”

“It has been incredibly rewarding to **expand my professional network** through Compass.”

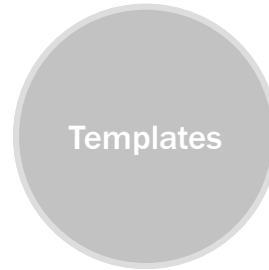


Framework: The 5 Ts of Volunteer Management

Make it easy for your volunteers to volunteer, from recruitment to retention.



Volunteer Management Tool #1: Testimonials



GOALS:

- Give your existing volunteers a meaningful opportunity to reflect on their experiences with your organization
- Make your volunteering opportunity come to life for prospective volunteers



Volunteer Management Tool #1: Testimonials

Compass Pro Bono
4,904 followers
3mo · 🌐


Looking for ways to make an impact in the new year? Become a Compass Pro Bono volunteer and solve a business strategy challenge for a local nonprofit. Check out our current opportunities 📄

- Chicago: <https://bit.ly/CH-bp22>
- DC: <https://bit.ly/DC-bp22>
- Philly: <https://bit.ly/PH-bp22>
- Twin Cities: <https://bit.ly/TC-bp22>

“Compass is a great organization that provides needed strategic consulting services to nonprofits that are doing great things for the community. If you have time and skills to share, please consider joining a Compass team. You will be glad you did.”

Claudia Springer
Principal, Novo Advisors
3x Compass Pro Bono Volunteer

with Claudia Springer



New & Upcoming Volunteer Opportunities ▶ Inbox x

M Mary Uran, Compass Pro Bono
to me · 10:33AM (0 minutes ago)


Looking to make an impact in your community?

Support a nonprofit through skilled volunteering!
Check out our volunteer opportunities:

Team-based Consulting Projects
Join a team of volunteer consultants to solve a strategic business challenge for a local nonprofit. Projects run from late January through May. Application opens November 20. [Register for our 12/7 info session.](#)

[Learn More](#)

“Compass allows the opportunity to tie business acumen and experience to community partners and passion projects. I have personally connected to the mission of each of my Compass nonprofit clients and am proud of each project team's recommendations and deliverables.”
— 2023 Volunteer



Compass Pro Bono
4,904 followers
1yr · 🌐

We strive to foster meaningful connections between our volunteers, nonprofits, and our community. Thank you [Shreya](#) for sharing your experience!


Shreya Mahatwa (She/Her) · 2nd
Associate @ Marcum LLP | Executive Search, Transition, & Planning (Non...
1yr · 🌐

For Global Volunteer Month, I wanted to highlight the amazing work of **Compass Pro Bono**. This organization provides invaluable strategic guidance to non-profit groups, enabling them to achieve strategic excellence through partnerships with local professionals.

Personally, I've had the pleasure of supporting Joseph's House, an amazing organization that provides a safe haven for individuals who are homeless and suffering from end-stage diseases like HIV and cancer. It has been an incredibly gratifying experience to be a part of this important work and to contribute to such a worthy cause.

Thank you to [Katrina](#) and [Karla](#) for being amazing team leaders. Their leadership and dedication are truly inspiring and have made my volunteering experience even more meaningful.

6

 Like Comment Repost Send



Volunteer Management Tool #1: Testimonials

Here's our process, to get you thinking:

Collection

Collect quotes at regular points throughout the project cycle:

- Mid-Project Survey
- End-of-Project Survey
- volunteer events
- check-in emails

Identification

Sift through and select the strongest quotes at consistent times.

- 1 week post-survey
- end of program cycle each year

Categorization

Create "best of" repository for quotes broken down by:

- year
- city
- volunteer type

Publication

Feed best quotes into social media, emails, presentations, etc.

- always get consent
- place next to headshot
- include volunteering details (ex. year, project)

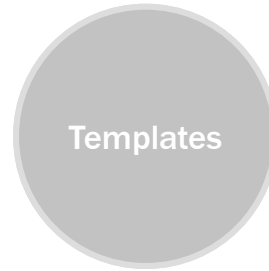
Recognition

Tag volunteers on social media so they can share on their own!

- more on this later...



Volunteer Management Tool #2: Trainings



GOALS:

- Equip your volunteers with the knowledge they need to execute their work
- Prepare volunteers to serve as ambassadors for your organization & represent you well in the community



Volunteer Management Tool #2: Trainings

CLIENT Implementation Roadmap

June 2022 July 2022 Aug 2022 Sept 2022 Oct 2022 Nov 2022 Dec 2022 Jan 2023 Feb 2023 Mar 2023 Apr 2023 May 2023 June 2023

Deliverable: Implementation Timeline

Tech 101 Training for
Compass Volunteers
February 7, 2023

Next, if you haven't done so already, please respond/RSVP to the following items:

- **Volunteer Orientation**
 - Wednesday, October 19, 6:30 p.m. bit.ly/volOrientation22
- **Service Line Training**
 - Thursday, October 27, 6:30-8:00 pm ET
 - Please use this link to register: <https://bit.ly/Vol2022DSP>



Volunteer Management Tool #2: Trainings

Here's our process, to get you thinking:

Ideation

Brainstorm what baseline training your volunteers need.

- define the WHY (how did we get here, why do we need you to do this)
- orienting them in the nonprofit world if not familiar with it, etc.

Collection

Determine potential sources of training content, including:

- past info sessions
- static resources
- external trainings
- external literature
- tips from volunteers

Categorization

Decide on the proper format and audience for each training:

- live vs. asynchronous
- new vs. returning vols
- presentations vs. interactive workshops

Staffing

Create a "super-volunteer" corps to support trainings year-round:

- train the trainers
- give some creative freedom/ownership
- emphasize stories & personal experiences

Training

Deliver trainings, focusing on multimodal learning & interactivity:

- create content for all learning styles (visual, auditory, social, etc.)
- offer supp. resources (NonprofitReady)



Volunteer Management Tool #3: Toolkits



GOALS:

- Maintain a standing repository of resources your volunteers might need throughout their time working with your organization
- Eliminate unnecessary back-and-forth communication



Volunteer Management Tool #3: Toolkits

Compass Pro Bono Too... > Compass Pro Bono Tool... ▾








Type ▾ People ▾ Modified ▾


Folders

- 1 - Team Resources
- 2 - Analytic Tools, Resource...
- Decision Support
- Funding Strategy
- Organizational Performanc...
- Partnerships, Collaboration...
- Strategic Marketing
- Sustainability Analysis
- xOn Demand

... > Funding Strategy > Tools & Resources ▾

Type ▾ People ▾ Modified ▾

Name ↑	Last mo... ▾
 Analytic Tool - Donor Gift Trend Analysis.xls	Nov 5, 2021 me
 Compass Funding Strategy Framework (internal).pdf	Oct 4, 2021 me
 Compass Funding Strategy Project Description.docx	Aug 3, 2022 me
 Giving Day Campaign Toolkit Template	Jan 17, 2023 Bethany Rubin ...
 Presentation - Spark Point Fundraising Q+A Compass ...	Mar 25, 2021 me
 Share of Wallet Analysis (SOW) Data Worksheet.xlsx	Oct 6, 2021 me
 Share of Wallet Analysis.docx	Oct 6, 2021 me



Volunteer Management Tool #3: Toolkits

Here's our process, to get you thinking:

Ideation

Brainstorm what tools your volunteers need in order to do the work well.

- define the WHY
- orienting them in the nonprofit world if not familiar with it, etc.
- can include reference training recordings!

Maintenance

Appoint staff to maintain toolkits throughout programs.

- update resources
- add help text
- revise resource names for clarity
- reorganize as needed

Keeping it Fresh...

Revisit toolkits content every program cycle to assess its relevance.

- nix outdated content
- flag underutilized resources
- add in new tools based on new needs

...Relevant...

Check in with volunteers about their use of toolkits.

- focus on HOW and WHEN they're using the resources
- let volunteer needs inform the tool, not the other way around

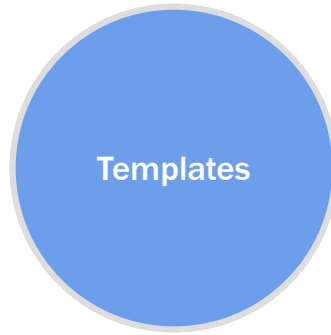
...and Front & Center

Proactively tell volunteers what tools can help them & when.

- guide volunteers toward resources that may come in handy
- habituate turning to toolkits before coming to you w/ Qs



Volunteer Management Tool #4: Templates

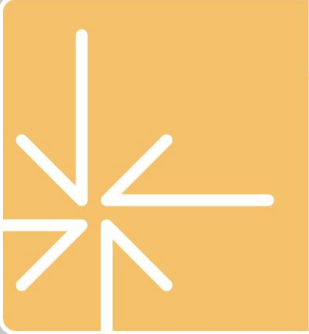


GOALS:

- Make it easy for your volunteers to do their work
- Make it easy for your volunteers to SHARE WITH OTHERS about their work



Volunteer Management Tool #4: Templates




Social Media Toolkit

Volunteers

By amplifying the fantastic work you're doing for our community you can (1) inspire others, and (2) help us recruit more talented volunteers like yourself!

- ★ Follow [Compass Pro Bono](#) on [LinkedIn](#)
- ★★ Add [Compass to the volunteer section of your LinkedIn profile \(how-to\)](#)
- ★★★ [Post about your experience → examples on the following slides](#)

Please contact [Alexandra Rivera](mailto:Alexandra.Rivera@compassprobono.org) at arivera@compassprobono.org with any questions.
Compass Pro Bono, Registered 501(c)(3), EIN: 26-3724642

1 

Sample Captions

Compass website links by city:
Chicago: <https://bit.ly/CHbp22>
DC: <https://bit.ly/DCbp22>
Philly: <https://bit.ly/PHbp22>
Twin Cities: <https://bit.ly/TCbp22>

Excited to share that I've kicked off a @Compass Pro Bono consulting project for [\[client name\]](#)! Looking forward to utilizing my professional skills to support and engage with our community. Stay tuned for updates!

Interested in getting involved? Check out Compass' volunteer opportunities here: [\[insert link from top right\]](#)


I hope you'll consider applying. Message me if you have any questions or if you'd like to learn more about my volunteer experience. #Impact


[city] friends! I'm thrilled to share an awesome volunteering opportunity I've been part of with @Compass Pro Bono. After being selected to serve as a Compass Pro Bono volunteer, they matched me with the nonprofit, [\[client\]](#), to conduct an eight-month strategic consulting project. I'm excited to be able to apply my professional skills to help them serve our community and make a positive impact!

Message me if you have any questions or if you'd like to learn more about my @CompassProBono volunteer experience.

Use these captions for inspiration or post them as-is!


Please be sure to tag us: @CompassProBono




2 

Graphics for Social Media

@CompassProBono



Click here to download one of these graphics

3 

Bonus Sample Email Language

Know someone who would make a great volunteer? Please help us reach them!

Subject: Sharing a Unique Volunteer Opportunity

Hi [\[name\]](#),


I wanted to share something I think you'd enjoy. I'm [\[volunteering with/serving on the board of/partnering with\]](#) an organization called [Compass Pro Bono](#), whose mission is to forge lasting cross-sector ties between the nonprofit and business communities.

Their flagship program, On Track, provides strategic consulting services to local nonprofits (free of charge!) by leveraging the skills of local business professionals - and I thought of you! It's a really unique model: Compass works with nonprofits to tease out their business strategy challenges into actionable consulting projects. Then they recruit local professionals to join teams to support a nonprofit based on their skills and interests. Projects begin in late January and last four months.

Given your talents and interests, I think you'd bring a lot to the table and really enjoy the experience! The volunteer application is now open, you can learn more here: [\[insert link from above\]](#)

And of course, let me know if you have any questions—I'd be more than happy to share about my experience.

(your name)

4 



Volunteer Management Tool #4: Templates

Here's our process, to get you thinking:

Ideation

Establish language that captures your mission + how volunteers fit into it.

- think about your value proposition for volunteers
- avoid jargon
- prioritize strong language that speaks to emotions, not logic

Maintenance

Adapt the language so it speaks from the volunteers' POV.

- if you need help, ask some volunteers why they volunteer with your org and use their answers as inspiration

Templatification

Create templates that make it EASY for volunteers to share.

- social media, email, text, word of mouth...
- focus on simple and powerful language
- allow space for personalization (e.g., for volunteers to share their own stories)

Distribution

Share templates with a specific ask + clear guidance on usage.

- attach your ask to a specific campaign/time frame to motivate them
- remind volunteers how important word-of-mouth support can be for mission

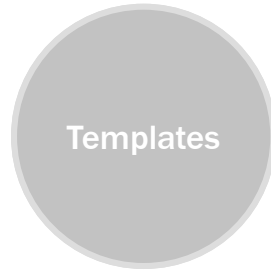
Promotion

Boost volunteers' social media posts whenever you can. It's a win-win:

- helps them reach a wider audience
- fosters sense of connectedness to org
- adds personal touch to your marketing



Volunteer Management Tool #5: Touchpoints



GOALS:

- Create consistent opportunities for bidirectional feedback with volunteers
- Establish “culture of communication” & warm touch with volunteers before, during, and after their service



Volunteer Management Tool #5: Touchpoints



End-of-Project Survey 2021-22 - Team Members

Survey

Thank you for taking the time to complete the End-of-Project survey. The survey should take less than ten minutes of your time and provides us with helpful information to better serve volunteers and nonprofits.

Please note: All responses are seen only by Compass staff. We would appreciate your reply no later than **Wednesday, June 16th**.

*** 1. Which Compass client did you work with?**

*** 2. I found the Compass experience to be valuable.**

- Strongly Agree Agree Not Sure Disagree Strongly Disagree

Please elaborate.

*** 3. My Compass team delivered a high-quality consulting product to our client.**

- Strongly Agree Agree Not Sure Disagree Strongly Disagree

*** 4. I believe that my Compass project will have a significant positive impact for our client.**

- Strongly Agree Agree Not Sure Disagree Strongly Disagree



Volunteer Management Tool #5: Touchpoints

Here's our process, to get you thinking:

Design

Brainstorm WHEN and HOW you can connect with volunteers.

- what touchpoints would be most helpful for your organization?
- what touchpoints would be most helpful for your volunteers?

Placement

Schedule surveys, events, roundtables, etc. at those junctures.

- give plenty of notice to expected attendees
- consider making attendance required
- budget for no-shows & always have a Plan B

Engagement

Engage volunteers with each other to discuss their experiences.

- work to foster a sense of community
- create opportunities for mutual support + encourage idea-sharing
- allow time for networking!

Impact (Live)

Communicate your volunteers' impact throughout their work.

- keep them motivated to push through to the end
- share direct quotes from beneficiaries

Impact (Long-Term)

Communicate your volunteers' impact after their work ends.

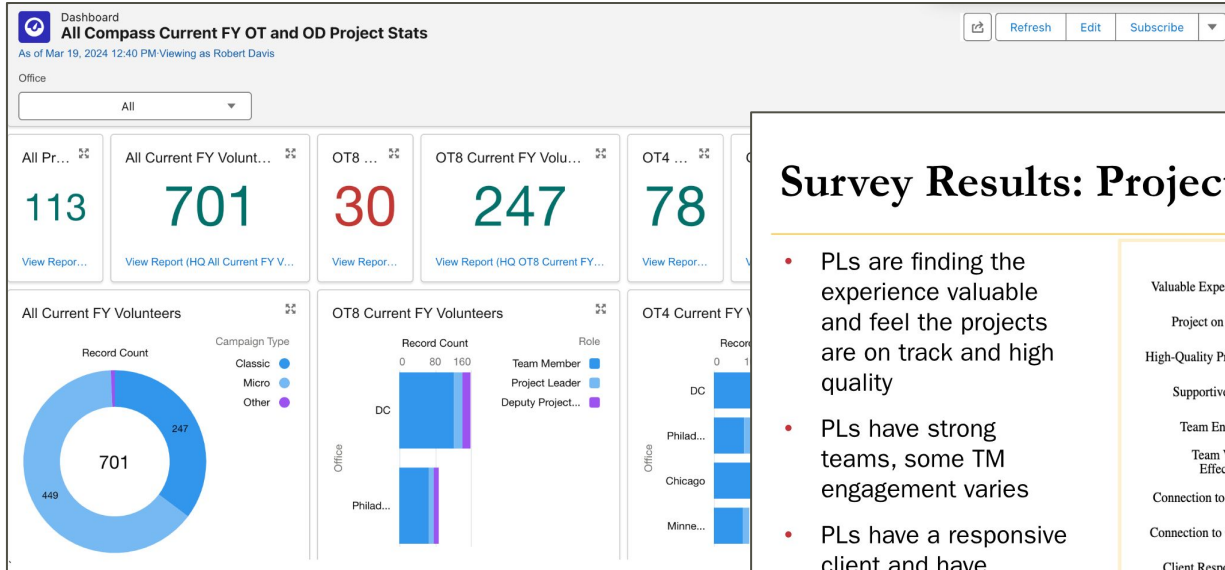
- help them see the impact of their efforts so they'll stay engaged
- share direct quotes and impact metrics from beneficiaries



Foundations: Relationships & Communication

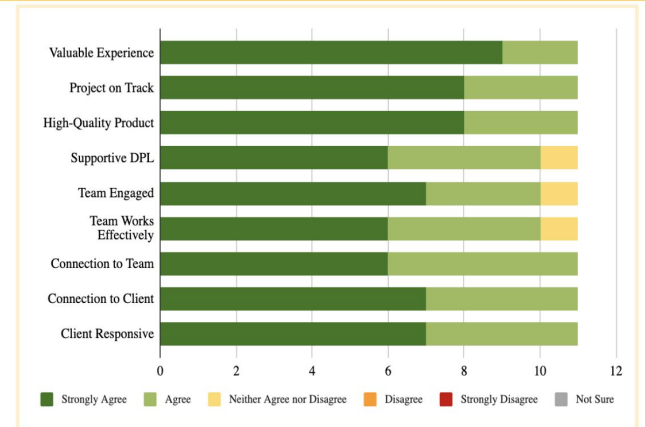


Making it Sustainable with Data



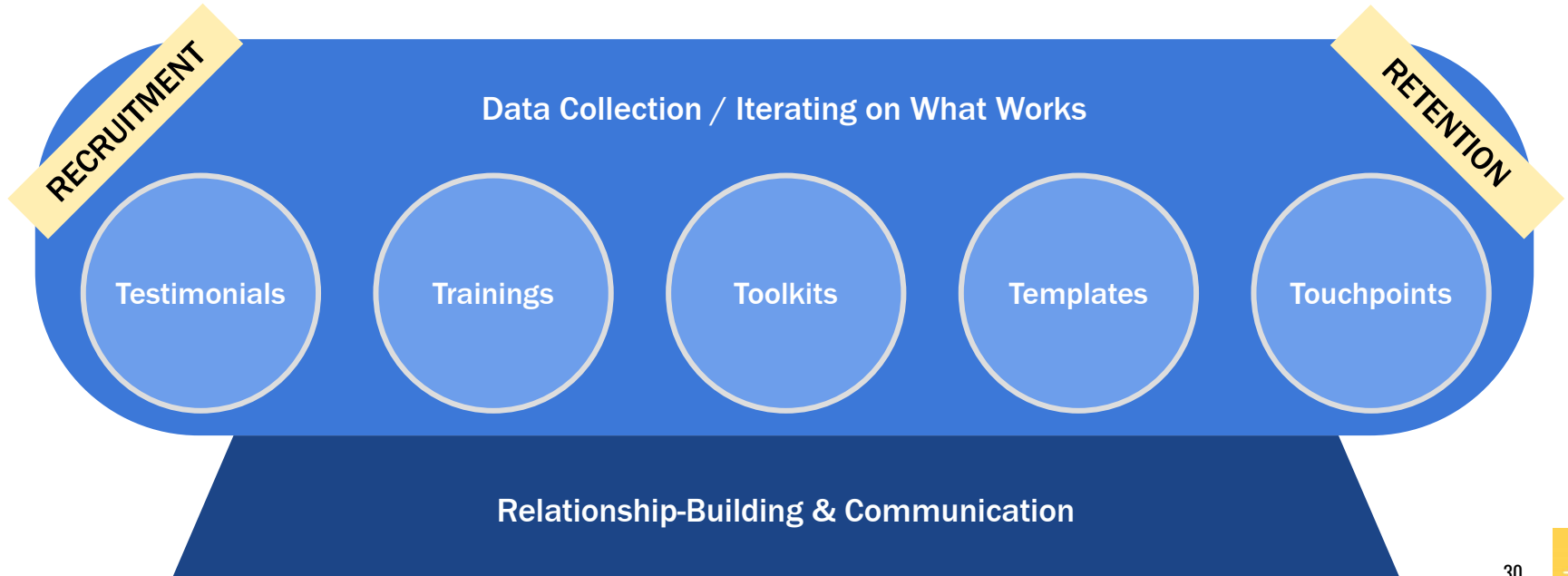
Survey Results: Project Leaders

- PLs are finding the experience valuable and feel the projects are on track and high quality
- PLs have strong teams, some TM engagement varies
- PLs have a responsive client and have developed strong rapport



The 5 Ts of Volunteer Management

Make it easy for your volunteers to volunteer, from recruitment to retention.



Getting creative to activate volunteer skill sets

What motivates our volunteers to work with us? What excites them?

How might we tap into those desires to build new opportunities?

1

Desire to engage with local nonprofits

Client Selection Committee

2

Desire to use business skills for good

Service Line Trainers

3

Desire to network with professionals from different industries

On Track Project Advisors

This all requires knowing your volunteers' WHY. (Which means talking to them.)

One more resource for you...

[NonprofitReady](#) - modules we provide to our volunteers with an abundance of insights about the nonprofit sector and how nonprofit organizations start, grow, and operate day-to-day



Questions?

Mary Uran

Managing Director - Twin Cities
Compass Pro Bono



Want to talk more?

Interested in working with Compass?

Curious to engage Compass in your community?

muran@compassprobono.org

 Mary Uran

www.compassprobono.org

 @CompassProBono

