



Developing a Case Statement for Your Volunteer Program
2015 Ohio Conference on Service and Volunteerism



TODAY'S SESSION

- Why develop a case statement?
- Elements of a Successful Case Statement
- Considerations
- Resources to Assist
- Q&A and Group Discussion

WHY DEVELOP A CASE STATEMENT?

WHY DEVELOP A CASE STATEMENT?

- Articulates a philosophy/point of view regarding national service and volunteering for your organization.
- Outlines the possible roles members/volunteers can serve within the organization.
- Serves as a conversation starter regarding the possibilities.
- Clarifies the investment needed to effectively engage members/volunteers.
- Serves as an advocacy tool within the organization.

ELEMENTS OF A SUCCESSFUL CASE STATEMENT

- Provide an **overview of the organization** – vision, mission, strategic goals, services provided, annual budget, etc.
- Identify **community needs** not being currently met by the organization
- Identify **organizational needs** not currently being met
- Detail **research** regarding the organizational benefits to effective volunteer engagement
 - Increased organizational capacity
 - Budget resourcefulness
 - Community support

ELEMENTS OF A SUCCESSFUL CASE STATEMENT

- Provide a snapshot of the organization's **current engagement practices** – numbers of volunteers, number of members, impact, investment, staffing to support, etc.
- Outline the **possible roles** members/volunteers can serve within the organization.
- Clarifies the **investment needed** to effectively engage members/volunteers.
 - Staff support
 - Financial support (provide a detailed analysis)
 - Organizational time to implement changes/participate in training

CONSIDERATIONS

- **Quantify the value of your current engagement practices**
 - Make sure that leaders understand the current value of member and volunteer contributions
 - Determine the ROI volunteers represent
 - What wouldn't happen within the organization without members/volunteers?
- **What more could your organization accomplish with additional resources?**
 - Identify activities that members/volunteers could support
 - Could staff member's time be more effectively leveraged in other ways?
 - Where has the organization wanted to go, but has been unable to due to limited resources?

CONSIDERATIONS

- **Recognize the way your organization already engages volunteers**
 - Board of directors
 - Development functions
 - Service delivery
 - Administrative functions
- **Quantify the savings the organization realizes as a result of these volunteers**
 - Use Independent Sector or HON volunteer engagement calculator to assist
- **Identify your internal supporters** – other staff, board members, alumni members, volunteers – to re-enforce messaging regarding value of members/volunteers

CONSIDERATIONS

- **Determine your pitch angle – what will resonate most with leadership? What’s the added value?**
 - Increased service delivery
 - Strengthened organizational capacity
 - Staff engaged in new ways
 - Relative cost savings to organization
 - Aspirational/innovator
- **Change the conversation – members/volunteers as a resource, not a distraction**
 - Bring new skills and networks to organization
 - Outside perspective
- **Use the available research to support your pitch**
 - Research, anecdotes/examples, mixture of both

CONSIDERATIONS

- **Examine practices of respected or like organizations in your community**
 - Share their successes as motivation
 - Have peers reach out to your leadership
- **Ensure an understanding of investment needed to be successful**
 - Don't undersell the resources needed to be successful
 - Core organizational competency – just like HR, development, etc.
 - Training (paid staff, members and volunteers), position descriptions, recruitment, management, recognition
 - Develop a tracking system to account for volunteer impact

CONSIDERATIONS

- Have **realistic expectations** – start small, don't expect miracles overnight
 - Secure a minimum commitment from leadership
 - Start in one department or functional area
 - Make sure that paid staff have realistic expectations of member/volunteer time and skills
 - Ensure that volunteer roles are important, but not urgent
 - Provide extra support to volunteer naysayers to ensure success
- **Head problems off at the pass**
 - Build on previous successes, but don't continue ineffective practices
 - Ask for feedback from paid staff and volunteers

CONSIDERATIONS

- **Communicate success/make member and volunteer contributions visible**
 - Communicate successes frequently throughout the organization, but especially to leadership
 - Include the value of member/volunteer contributions in board reports and financial statements

RESOURCES TO ASSIST

- **Research**
 - TCC Group service enterprise research
 - Deloitte service enterprise characteristics
- **Tools and Resources**
 - Nonprofit volunteer management funding guide
 - Nonprofit case studies
 - Why Invest? Volunteer Management for Funders
- **Other Recommended Resources**
 - Oregon Volunteers – Volunteer Management Advocacy Toolkit
 - Energize Inc. website
 - Leading the Way to Successful Volunteer Involvement by Betty Stallings

REIMAGINING SERVICE

Converting good intentions into greater impact

ReimaginingService.org
@ReimaginingServ