Congratulations!

You have decided to explore the possibility of recruiting mature volunteers to use their leadership skills to help nonprofit organizations meet their missions in the community.

This is exciting work. We are beginning to see a new generation of mature individuals who are retiring or downsizing their employment commitments. These individuals have tremendous skills that they have acquired over a lifetime of education and work experiences. These skills would benefit many nonprofit organizations. What needs to be built is a mechanism that can bring these individuals into leadership levels of volunteer service. RSVP’s and volunteer centers are positioned to provide that mechanism.

In early 2007, the Southern Maine Agency on Aging was fortunate to be awarded a grant by the National Council on Aging (NCOA) to test a model for doing just that. We called our proposed model “the Capacity Corps,” and we made it part of our RSVP (Retired and Senior Volunteer Program). The Capacity Corps model was developed to
expand RSVP’s offerings to include leadership levels of volunteer service. While RSVP of Southern Maine had 33 years of experience in recruiting people aged 55 and over for volunteer service with a variety of nonprofits, almost all of those placements were in either direct service or back-up support (i.e. clerical). We did not have experience recruiting volunteers with professional backgrounds to provide leadership skills to nonprofits.

To create a “laboratory” for branching into this new area of volunteer recruitment and management, we decided to implement a 2-year program recruiting such volunteers for Southern Maine Agency on Aging itself. SMAA is a (501)(c)(3) nonprofit organization that provides information and services to help people age 60 and over and their families. As a nonprofit, SMAA has needs for assistance that we felt would be similar to those in a variety of other nonprofits, such as:

- Strategic Planning
- Marketing
- Public Relations
- Financial Planning
- Business Planning
- Information Technology
- Fundraising
- Emergency Planning
- Nonprofit Development

We felt that if we could demonstrate that there were skilled professionals with time to give who would be willing to help SMAA in a project-based way in these areas, then it would bode well for RSVP being able to provide volunteers to help other nonprofits with similar needs in the future.

The overall goal of the Capacity Corps project, once the demonstration grant was finished, was to make Capacity Corps a regular part of our RSVP and to work with other nonprofits in our service area which could use the skills these professional level volunteers can provide.

What follows is the Replication Guide that we promised as one of our outcomes for this project. Our purpose is to capture the lessons we have learned in our two years of work on the RSVP Capacity Corps in a form that would assist any other RSVP or volunteer center that might want to undertake a similar project. We hope it is helpful to you.

For purposes of this document, we will on occasion refer to these mature volunteers with high level management or technical skills and experience as Capacity Corps volunteers. This is for clarity. Anyone creating such a program may use any name they wish.
Important Background Information

1. **Volunteers are available**

   It is no surprise to anyone that the demographics of the United States are changing. To quote from the National Council on Aging’s RespectAbility website, “Demographic trends point to the continued growth of the healthiest, best-educated, and most financially independent generation of older Americans in the nation’s history. This represents a growing resource of time, energy and talent with the potential to competently address community problems nationwide through volunteer work and employment.”

   This is especially true for Maine. Potential older volunteers are already here, and there will be more every day.

   Maine currently has the oldest median age of any state in the union (42.0 years), which is almost 5 years above the national average. (U.S. Census) “Maine is also another of just 4 states with a baby boomer population of 30% or more, and as the boomer generation ages, it is inevitable that Maine’s population will follow suit. According to the 2000 census, Maine placed 12th out of the 50 states based on the percentage of its population age 65 and above with 14.4%. By 2030, however, the Census Bureau projects that Mainers age 65 and over will constitute 26.5% of the state’s population – a 12.1% increase that would catapult Maine to second in rank, just a half of a percent behind Florida. (Maine State Planning Office)

   “A large portion of retirees also contribute to their communities through volunteering. The Corporation for National and Community Service indicates that about 25% of Maine’s over 65 population volunteers, and those who volunteer spend a media of 100 hours volunteering in a year.” (Maine State Planning Office)

   Finally, southern Maine is experiencing a net immigration of people. “Although the exact number of new retirees is unknown, we do know that between 2001 and 2002, Cumberland County had a net immigration of 1,473 people of all ages, and York County had a net influx of 2,932.” (Maine State Planning Office) All indications are that this trend has continued in the years since.

2. **Perceived barriers to working with such volunteers**

   In 2003, the National Council on Aging (NCOA) conducted research to understand why older adults who were retiring from the for-profit section with high level skills that could benefit nonprofits weren’t being asked to share those skills in any great degree. They discovered that many nonprofit leaders felt there were barriers to using such volunteers:
a. Lack of experience in and time for managing such volunteers

Most nonprofits have experience managing volunteers, whether or not they have a formal system for doing so. But when nonprofit leaders participating in the NCOA’s research were asked about using volunteers with high level skills for leadership level service in their organizations, many felt that this would require a level of volunteer management experience that they did not have “on board.” They felt that such volunteers would expect to be integral participants in the organization and they would require more careful handling and time and involvement from organizational staff than most volunteers did. They weren’t sure they were ready for that.

At Southern Maine Agency on Aging, we found that our Capacity Corps volunteers did, indeed, want to be integral to the organization, and that this does, in fact, take some time, both on the part of the professional volunteer management staff and on the part of those staff who were working with the Capacity Corps volunteers on projects. However, the time required to manage such volunteers was not overly burdensome and the results were well worth it (see below).

b. Cost to manage such volunteers

This perceived barrier relates to the question of allocating time to work with volunteers with high level experience and skills. Even in the nonprofit world, time is money, so to devote time and energy to working with leadership level volunteers has a cost to it. This, too, is true. However, as noted above, it was well worth it in light of the results achieved (see below).

c. Loss of control

Volunteers with the high level skills we are talking about have often been “in charge,” of projects, divisions or even whole organizations. It was expected by some of the nonprofit leaders that they would bring this “take charge” attitude with them into their leadership level volunteer work. This could be helpful or harmful, depending on the situation. Some of the nonprofit leaders surveyed were concerned that these volunteers might not understand the differences between how things work in the corporate sector and how they work in the nonprofit sector. Their concern was that such volunteers might “take charge” of things to the point of leading the organization in an unhelpful direction and alienating staff, clients and community stakeholders.
Our experience at Southern Maine Agency on Aging was different. In the first place, all Capacity Corps volunteers were engaged in leadership level projects. In the second place, these projects were initiated and developed by Agency staff to help them in their work for the Agency. Thirdly, we made it clear from the beginning that the Agency staff member working with each Capacity Corps volunteer was the project manager and that the volunteer was accountable to that person. Fourthly, we provided orientation, formal or informal, about the Agency, its mission and operations and overall goals. We also provided education about nonprofits and the special circumstances under which they operate. With these precautions in place, we had no trouble harnessing the skills and energies of our Capacity Corps volunteers into channels that brought real benefit to the Agency.

The Implementation Plan that follows employs these same strategies.

d. Question of whether it was worth it.

This was the bottom-line question for the nonprofit leaders who participated in the NCOA’s research. Would the results achieved by engaging volunteers with high-level skills in leadership volunteer roles in their organizations be worth the time and effort needed to make it work?

We at Southern Maine Agency found that it was. Our experience demonstrated this in several ways:

(1) First there were the results of the projects in which Capacity Corps volunteers participated:

A new strategic plan for the Agency  
A new system for delivering Meals on Wheels  
A new plan for marketing Meals on Wheels  
A business continuity plan for the Agency  
An accounting manual to explain Agency financial systems  
New material for the Agency newspaper, Senior News.  
New written materials for our Development Office  
A new planned giving program as part of our fundraising effort  
Support for our information and referral process

Capacity Corps volunteers made strategic and valuable contributions to all of these outcomes.

(2) Monetary Return on Investment (ROI)

As part of the Models of Significant Service Project, the NCOA asked its grantees to track both the cost and the benefit of our older
volunteers in monetary terms. We did this by using the Strategic Metrics and Results Tracking (SMART) system, a web-based tool created by the NCOA. Essentially, this is how the system worked

A. We tracked all the hours that our organizations' staff spent on recruiting, interviewing, screening, training and supervising volunteers in professional and leadership roles.
B. We tracked which staff were involved and plugged in their annual salaries. The system calculated an hourly wage rate for each staff member.
C. We tracked other direct costs for training, recruiting, etc.
D. We tracked what each of our volunteers in professional and leadership roles was doing for our organizations.
E. We matched each of these volunteers' activities with the closest job category from a long list furnished by the U.S. Department of Labor.
F. The developers of the SMART system used DOL figures to assign each job category in the list an annual salary figure and calculate an hourly wage rate.
G. We tracked all the hours that our professional and leadership volunteers spent on activities for our organizations.
H. The system then calculated a Return on Investment (ROI), as follows:

Hours of service delivered by volunteers multiplied by the appropriate wage rates

minus

the sum of the hours spent by staff on bringing volunteers on board and supervising them multiplied by their wage rates plus the other direct costs.

equals

The Return on Investment (ROI)

The return on investment of all the MSS participating partners during the tracking period was over 3 to 1.

For every dollar in staff time that the participating organizations devoted to the project plus every dollar in direct expenses, the organizations received over three dollars worth of high level volunteer service that helped them do important work in building their capacity to serve their communities.
A Plan for Implementation

1. **Develop a draft plan.**

For us this occurred when we wrote our grant application in response to a request for proposals from the National Council on Aging. But even without a grant application it is a necessary first step. It is a truism that we have to know where we want to go before we start on our journey.

Ask yourself some questions. Why is it important to your RSVP or volunteer center to undertake a project that seeks to match mature volunteers who have high level skills with local nonprofits? How will it benefit the nonprofit organizations in your community? How will it benefit your RSVP or volunteer center? What steps would you have to undertake to get there? What outcomes would you like to see?

If you are working in an RSVP, you are probably familiar with the Corporation for National and Community Service’s Five Element Impact Statement. Using this or another logic model format might be helpful in outlining what you want the outcomes to be and what you need to do to make them happen.

At this point, it is best to consider your work as a draft plan. It is to provide a starting point for the steps to come. Your more mature plan should have the input of a variety of stakeholders.

2. **Identify partners.**

Who in your community would be excited by this idea of recruiting mature volunteers with high level skills to help nonprofits in leadership roles?

In thinking about this question, we encourage you to think broadly. Looking back, we did not think broadly enough. We did think to talk to people from AARP, the Maine Community Foundation, the Institute for Civic Leadership (which promotes volunteer civic engagement), the Osher Lifelong Learning Institute at our local university, the Maine Association of Nonprofits, the Maine Commission for Community Service and Bonney Staffing Center. We included representatives of these organizations in a steering committee (see below). But since then we have learned of some similar projects that cast the net more widely. The Temple University Center for Intergenerational Learning in Philadelphia, for example, enlisted not only the resources of their own university, but those of United Way, AARP and the local public television station in creating their Coming of Age program. So think about community partners who could bring resources to the project and help you disseminate it widely in your community.
3. **Create a steering committee.**

As mentioned above, we formed a steering committee. A list of its members may be found on page 19. We did this very early in the process, even as we were preparing the grant application. Although the steering committee did not start meeting until the grant was awarded, we wanted to have the members identified, briefed and excited from the very beginning.

What are the roles of a steering committee?

a. First, steering committee members form a good liaison to community partners you want to engage in your project.

b. Second, they help lend importance and credibility to your project. "If she is giving time to this, it must be important."

c. Well-chosen steering committee members bring a wealth of experience and knowledge to your planning process.

d. Because of their experience and knowledge, they can help steer you in productive directions. Our steering committee made several critical suggestions in our early planning.

e. They can help bring other key players into the project.

f. They can help you publicize your project.

g. They can be the champions of the project in the community.

4. **Refine the plan.**

With the steering committee in place, it is time to take another look at your plan with the benefit of their review. Present your plan at a meeting of the steering committee. Explain your vision for Capacity Corps volunteers helping local nonprofit organizations, what you hope to accomplish and how you hope to accomplish it. Then talk with the members of the committee to determine if you have been able to make it clear to them. This is a good first test as to whether the community at large will be able to understand it. Determine any parts of the plan that were not clear to the members, and enlist their help in reframing the plan so that it is clearer. Ask for suggestions for changes that might be helpful.

This proved valuable to us. In our first presentation of our plan, the steering committee raised questions about the sequence of events and tasks we had outlined; their suggestions prompted us to modify our approach. They asked us to more clearly define the lines of accountability when a Capacity Corps volunteer is working in a leadership role in a nonprofit. At a later meeting, when we presented the list of position descriptions that had been generated by the program managers at Southern Maine Agency on Aging for our Capacity Corps volunteers, they suggested that these sounded too much like “jobs” and that retirees might shy away from them. They suggested project descriptions and skills lists, an alternative that we followed. They also stressed the importance of training or orientation for all involved.
Your steering committee can be a valuable source of guidance and support.

5. **Publicize your plan.**

Even though you are just getting started, once you and your partners on the steering committee have the basic outlines of what you want to accomplish, it is good to start publicizing this in the community. In retrospect, we didn’t start this soon enough. By publicizing early, you may elicit the interest of new potential partners, potential volunteers and even potential funding sources. You also lay the groundwork in public knowledge so that when you do start recruiting in earnest, people will have already heard about what you are trying to do.

6. **Identify a few nonprofits that might like to participate.**

Notice the word “few.” If this effort to recruit mature volunteers with high level skills for leadership roles in nonprofits is new for you and your community, it is best to think of your early efforts as a “pilot project.” We did. In fact, we tested this whole Capacity Corps concept “in house” at Southern Maine Agency on Aging to see how it worked. So we recommend selecting one, or two or three nonprofits to work with.

It would be helpful if the nonprofits you choose to test this concept are ones with which you are familiar. They should have a solid management team in place. The Executive Director should be someone who is open to new ideas. It would also be helpful if the organization had a history of working with volunteers and a volunteer management structure in place. As the project grows, you may not always have these assets in place, but in starting out you want to achieve success, and these factors help make that more likely.

7. **Meet with senior management and Board members of these nonprofits.**

Participants’ feedback and ideas. Be ready to answer questions and entertain new ideas that you maybe hadn’t thought of before. Make it a dialogue. Then ask the participants if they feel ready to further explore this as something in which they would like to participate. If they need to talk “in-house” further, set a time to be in contact with them again. And thank them for their time.

Not every nonprofit you approach will feel ready to undertake something new like this at any given time. There can be many reasons for this, most of which are outside your control. Don’t take that personally, but go on to approach other organizations that you think would be good partners to begin your project.

8. **Meet with other staff of these nonprofits.**
Assuming that you have been able to indentify a nonprofit organization whose senior management and Board are interested in working with you on this project, it is good if you can arrange to meet with a wider group of the organization’s staff. This is because other staff members, beyond the senior management, will likely be working with any Capacity Corps volunteers you bring to them, and they need to be “on board,” too. If it is simply a top-down mandate to work with the Capacity Corps volunteers, staff may be unenthusiastic or, worse, hostile to the whole idea. They need to understand that bringing on Capacity Corps volunteers is not a reflection on their work, and is not meant to supplant them but to supplement their work so new things can be accomplished. You and the organization’s senior management together have to deliver this message. You will also be asking for their input (see immediately below).

9. **Ask appropriate staff members to identify one or two projects on which volunteers with professional level experience could help them.**

We think it is helpful to ask the program management staff at the nonprofit with which you are working to suggest projects for Capacity Corps volunteer involvement. They in turn may ask for suggestions from staff in their programs. But we think it best to approach the program managers first.

At Southern Maine Agency on Aging, we approached it by asking managers to think about projects within their programs which had been on the “back burner” due to lack of time but which would benefit their program and hence their clients. Then we asked to think about whether any of these projects could be assisted or even managed by Capacity Corps volunteers with the relevant skills.

Because the program managers were more familiar with volunteers who helped with direct service activities or support activities, it was a stretch at first for them to think that volunteers could really manage part or all of a new project. But once we started explaining the kinds of skills we were seeking in our Capacity Corps volunteers, they started coming up with projects with which skilled volunteers could really help. A summary list of the projects the program managers at Southern Maine Agency on Aging identified may be found beginning on page 23. We did not end up finding volunteers for all the projects, but it was a good selection of possibilities to share with prospective volunteers. The projects for which we did recruit volunteers are marked with an *.

10. **Once appropriate projects are identified, ask that written project descriptions be created.**

All volunteers should be provided with clear descriptions of the tasks we are asking them to complete, but with Capacity Corps volunteers, it is especially important to have clear project descriptions. With their high level of skill and experience they are used to having clear objectives and procedures and they will want it from us when they volunteer. They will want to make sure their work will
make a difference and their time will not be wasted. So, clear descriptions are a must.

The following information should be included:

a. Project title
b. The reason for the project, its rationale
c. The project supervisor’s name and position within the organization
d. The project objectives
e. The list of tasks to be completed
f. The form desired for the final outcome
g. The time commitment expected, amount and duration
h. The schedule expected
i. The skills and experience sought
j. Location where the work is to be done
k. Any other pertinent information.

A template for creating a project description may be found on page 21.

As mentioned earlier, initially we developed a set of job descriptions outlining these points, but the steering committee wisely suggested we make it more “user friendly.” So we changed it into a shorter, narrative form while still trying to make sure that the items above were included. We would suggest highlighting the skills sought so that this information stands out. Our volunteers indicated that this was what first captured their interest.

11. **Compile project descriptions in a project book.**

Compiling your project descriptions in a project book creates a handy reference tool that can guide you in talking with prospective volunteers. Ours may be found beginning on page 25. We learned, however, that even this may be too much information for use as the first thing a prospective volunteer sees about the Capacity Corps project. So we moved away from sending out the project book to people who had just called and asked for further information. Once we got them to meet with us, then we would use it for reference.

12. **Compile a shorter list of skills sought.**

Because the project book seemed a little daunting to prospective volunteers as the first thing they saw about the Capacity Corps project, we began sending out the Summary List of Projects found beginning on page 23, instead. The very first thing under the project name is the skills sought. This allowed a prospective volunteer to quickly see if he or she had the skills necessary for the particular project.
Based on our experience, we suggest developing a list that highlights the skills sought by the Capacity Corps project, to use to guide the creation of your promotional material.

13. **Create orientation curriculum for volunteers and nonprofit staff.**

We believe it is very important that both new volunteers and the nonprofit staff with whom they will be working receive orientation to the project and the concepts that underlie it. This will help cement a good working relationship with “everyone on the same page.”

For our “in house” project, where Capacity Corps volunteers were working solely at Southern Maine Agency on Aging, we developed a training curriculum that may be found beginning on page 35.

For replication purposes, this could be modified:

a. Module 1, Part A covering the NCOA grant can be eliminated.
b. Module 1, Part B would focus only on the projects at the nonprofit’s partner with which you are working and might well be shorter.
c. Module 1, Part C would be provided by staff of the nonprofit with which you are working to orient the volunteers.
d. Module 2, Part A would be very beneficial as volunteers may or may not understand nonprofit governance and mission.
e. Module 2, Part B would be very beneficial to staff and volunteers alike and should prompt an open discussion.
f. The same applies to Module 2, Part C, which covers administrative matters.

Having an orientation curriculum is very important and it should be developed early in the project.

We did not develop a formal curriculum for training nonprofit staff on working with Capacity Corps volunteers. As we move forward with making this service available to other nonprofits this will need to be done.

14. **Develop venues, strategies and materials.**

Here is where your steering committee can prove helpful again. Choosing members for your steering committee who can open doors for recruiting can be very beneficial.

In our case, we selected members from the following organizations who could help us reach a population from whom we might recruit Capacity Corps volunteers: AARP, the Institute for Civic Leadership (which promotes volunteer civic engagement) and the Osher Lifelong Learning Institute at our local
university. Each of these organizations did publish information about the Capacity Corps project in their respective newsletters. We didn’t push them beyond that, but would encourage you to really engage your partners. We would suggest that you ask your partners to (a) contact individual members that they think might be interested, (b) arrange for you to make presentations to their members, or (c) both. We think this will bring you greater results than we realized from our partners’ newsletters alone.

Beyond the steering committee, we suggest that you think broadly about ways to get your message out. In addition to newsletters, brochures and posters, explore the electronic media available today. We generated some interest by posting opportunities on volunteer matching websites, including, in our case, the Southern Maine Agency on Aging website, VolunteerMaine.org (through the United Ways) and VolunteerMatch.org. There are, of course, others. Though we didn’t really explore social networking sites too much, you might want to look into Facebook and LinkedIn as means to get your message out..

And don’t forget word of mouth recruiting. It is still the most powerful, in some ways. A couple of volunteers came to us because friends of theirs had heard of the Capacity Corps project and suggested they look into it. You and the staff of your RSVP or volunteer center should spread the word wherever you go. So should the members of your steering committee. So should the staff members of the nonprofit organizations for which you are seeking Capacity Corps volunteers. Oftentimes a personal suggestion or a personal ask can be the best recruiting strategy of all.

We suggest developing a look, a slogan and a consistent message right from the beginning, which is something we didn’t do. Marketers will tell you, however, that this is key to grabbing people’s attention.

The folks at Temple University Center for Intergenerational Learning’s Coming of Age Initiative developed the slogan “JUMP IN.” In their graphics, the letter “U” was a different color, carrying the subliminal message that they “are looking for U.” They used this logo throughout their recruiting, to good effect.

It is good to develop a variety of recruitment materials for use in varying circumstances. We ended up doing a lot of experimentation to find out what worked best:

a. We sent information, brochures and posters to larger employers and various civic organizations.
b. We put articles in the Southern Maine Agency on Aging Senior News and other community newspapers.
c. We put notices on volunteer matching websites, as noted above.
d. We went on local radio and TV access shows to talk about the project.
e. We spoke to groups and distributed materials
The fact is, we got at least one volunteer from each of these methods, so we concluded that a variety of approaches is needed.

We also concluded that simple is best. To get people interested, a simple message is best for first exposure: (a) nonprofit organizations do wonderful things for our communities, (b) such organizations can benefit from the skills possessed by volunteers, (c) here is a list of some skills that nonprofit organizations could use help with, and (d) you may have such skills as a result of your work and community experiences over the course of your lifetime. More detail can come later.

15. **Begin recruitment.**

Once you have your recruitment plan worked out, get started.

Our timing was such that we had just hit the Maine summer when we got our recruiting and other materials lined up, so we put off active recruiting until autumn. That was probably a mistake. We suggest getting started as soon as possible, on multiple fronts. Post materials, send materials, call people and talk to them. Get your partners moving on getting the word out. See if you can line up some venues to speak about the project.

16. **Meet one-on-one with each potential volunteer to assess skills and interests.**

For this particular project, we recommend meeting one-on-one with each potential Capacity Corps volunteer to assess his or her skills and interests.

There are several reasons for this:

a. We are asking these volunteers to provide real hands-on leadership within a nonprofit organization to help them build their capacity to meet their mission. A perfect match is essential.

b. People with the high level of skills you are seeking have come from walks of life where they have grown used to being treated in a personal, professional way. Simply “sending them” to a nonprofit without the one-on-one contact might well seem offensive to them.

c. To make these matches work, it will be necessary to show a lot of flexibility (see below). That is best done through personal consultation and negotiation (in the best sense of that word).

17. **Be flexible; let the potential volunteer have some say in which parts of the project are interesting and what time commitment he or she can make.**

As mentioned above, potential volunteers who have the high level skills sought in a Capacity Corps placement are people who have had serious professional lives.
Whether they worked in nonprofits, government or in for-profit business, they are used to having influence, shaping their careers and taking charge of projects and activities. If we simply hand them a project and say, “This is it, take it or leave it,” they are likely to leave it.

In addition to that, we have found that being open and flexible tends to make for a better match. When we have sat down with a potential Capacity Corps volunteer and looked over a project description, they have sometimes been able to help us shape the project to make better use of their skills and reach a better outcome. That is why we have sometimes said, “This is one possible approach. This is what we want to accomplish through this project. Do you think the steps we have outlined are the way for us to get there?” The potential volunteer has then been able to say, “I see your goal, but have you considered possibly going at it this way?” Or, “I could really help you with this piece of the project, if another volunteer could take this other piece.” Better matches and better projects have resulted from this flexibility.

18. Meet with the potential volunteer and the staff person at the nonprofit who will be overseeing the project. Further refine what the volunteer will do. Help finalize expectations.

Once a potential volunteer has expressed interest in becoming involved with a certain project (which has perhaps been amended), we have found it helpful at that point for someone from the RSVP or volunteer center to meet with the potential volunteer and the nonprofit staff person who will oversee that volunteer’s project. Your role at that point is to introduce the potential volunteer and the nonprofit staff person to each other, help them get to know one another, guide a discussion about the project and listen carefully to make sure there are no misunderstandings or lingering questions. This has proven to be very helpful in making for a good match and a good working relationship.

19. Get the new Capacity Corps volunteer and the staff person with whom they are working into the orientation process as quickly as possible.

As described in #13, this is important so that the volunteer and the project manager with whom the volunteer will be working have similar understandings about the project, their respective roles, accountability, procedures, record-keeping and the like.

20. Check in periodically with the volunteer and the staff person at the nonprofit with whom the volunteer is working to assess their satisfaction with the process and help negotiate any needed changes.

Normally, this is something that RSVP’s and volunteer centers do anyway, but it is especially important here. Again, because of the high level of the work that is being done and the expectations that people with the kinds of skills and
experiences that lead them to become Capacity Corps volunteers have, it is important that you stay in touch. It helps the volunteers know that their work is important and can pick up any questions or concerns before they become debilitating.

As a cautionary tale, we had a volunteer who was busily working with a senior management staff person on a planning project. The volunteer reached the end of the first phase of the project and sent in his report. He waited to be contacted, but the senior management staff person had gotten very busy, so some time went by. Finally the volunteer e-mailed us and said, “I feel like I’ve been fired and I’ve never been fired before.” Obviously, we had some fence-mending to do. It pays for the RSVP or volunteer center to help make sure that everybody is talking to each other frequently.

21. Collect data on the outcomes.

Beyond tracking the time that the Capacity Corps volunteers put in, it will be important to track the outcomes of their projects. There are several reasons for this:

a. If this is a pilot project in your community, you want to show the value added that these volunteers with high level skills brought to the nonprofits with which they served.

b. You want to interest other nonprofit organizations in your community in partnering with you in order to obtain the benefit of Capacity Corps volunteers for themselves.

c. It may be possible to obtain community funding to support your efforts if you can demonstrate the return on investment that is reaped through this effort.

Enlist the nonprofits with which the Capacity Corps volunteers are serving to help you compile a list of the projects completed by the Capacity Corps volunteers, the difference those projects made to the organization, and, most importantly, the effect those completed projects had on the wider community through the services that the nonprofit was able to provide.

22. Recognize and publicize successful projects and volunteers.

When Capacity Corps volunteers are placed with a nonprofit and complete a project that builds the capacity of that nonprofit, that achievement should most certainly be recognized. Appropriate recognition from the nonprofit includes a letter of thanks from the nonprofit to the volunteer, presentation of the volunteer’s accomplishments (with the volunteer present) to the Board and staff of the nonprofit, articles about the volunteer and project’s successful completion in the organization’s public communications (including its website) and the local media.
Your RSVP or volunteer center can also publicize and recognize the volunteer and achievements, but something should definitely come from the nonprofit, and you may have a role to play in helping them remember to do this.

23. **Reward successful service.**

There has been a lot of discussion in the field about rewarding successful service by Capacity Corps type volunteers. Some feel that it will be necessary to provide incentives for people who have had high-level positions in the past commit themselves to significant volunteer service. Others disagree and feel that their natural desire to make a difference for others will be incentive enough.

The truth is probably in the middle. Monetary stipends are, of course, an incentive to get involved. However, such outlays of funds are probably beyond the scope of most RSVP’s and volunteer centers, and of many nonprofits as well. Then the question becomes, are there other kinds of rewards that could come into play?

Here there is room to be creative. Certainly, the public recognition described above is important and should be in place no matter what other rewards are considered. There may be other ideas, however, that would work in your community. Some that have been discussed include…

a. Discounts from local merchants  
b. Discounts or special invitations to local events  
c. Opportunities for continuing education events  
d. Invitations to special social gatherings  
e. Inclusion in activities of the nonprofits the volunteers have helped  
f. Invitations to participate in these nonprofits’ meetings and conferences  
g. Invitations from the nonprofits to come back and help some more

This last item might not sound like much of a reward, but nothing says, “We value what you have to offer,” like the invitation to come back and offer more.

In the interest of full disclosure, we at Southern Maine Agency on Aging have not offered any stipends in our program, but we have offered opportunities for inclusion in some Agency events and we have in some cases invited volunteers to come back to help with another project. As we move forward with providing Capacity Corps services to other nonprofits we may need to think about what other incentives we might be able to put in place to help recruit more volunteers.

24. **Continue to grow the effort by following these steps with new nonprofits and new volunteers.**

This replication guide has been written in a more or less linear format. But a project like this really develops in spirals. It is recommended to begin the
process with only a few nonprofits. But as you get each one going, you will be circling back to pick up new ones, so your program will grow.

Our two-year experiment with Capacity Corps has inspired us for the future. While finding volunteers of all backgrounds to fill needs at all levels of service will continue to be very important for RSVP, we believe that creating volunteer opportunities that will appeal to a new generation of volunteers who have a level of professional and technical experience unprecedented in previous generations is critical. We do not want to see the skills of these potential volunteers wasted. We do want to see the nonprofit organizations that are the backbone of compassionate communities survive and thrive to meet the growing needs of our future. We believe Capacity Corps type programs can bring these volunteers and these nonprofits together in ways that will bear fruit for all of us.

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The following are some tools that we found helpful in developing the RSVP Capacity Corps project here at Southern Maine Agency on Aging. We are including them in hopes that you might find them useful, as well.

Capacity Corps Steering Committee  
Capacity Corps Project Development Template  
Capacity Corps Projects Overview  
Capacity Corps Project Book  
Capacity Corps Training Outline  
Capacity Corps Brochure  
Capacity Corps Skills Checklist  
(courtesy National Executive Service Corps)  
Capacity Corps Skills Checklist Definitions  
(courtesy National Executive Service Corps)  
Capacity Corps Volunteer Enrollment Form  
Capacity Corps Volunteer Interview Form  
Recruitment and Project Results (as of April 27, 2009)
CAPACITY CORPS STEERING COMMITTEE
MEMBERS

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RSVP of Southern Maine Agency on Aging

Capacity Corps
Project Development Template

1. Project title
2. Project rationale – why this is a need at SMAA
3. The project supervisors name and position within the Agency
4. The project objective(s)
5. A list of the tasks needed to meet the objective(s)
6. The form of the final outcome desired
7. Amount of time commitment needed
8. Schedule of time commitment needed
9. Capacity Corps volunteer experience needed
10. Location where Capacity Corps volunteer may work
11. Other relevant information
SOUTHERN MAINE AGENCY ON AGING – RSVP Capacity Corps Projects

OVERVIEW

* Strategic Planning Data Analysis & Stakeholder Consultant

Skill Set: Researching and analyzing data; framing outcome measures; conducting focus groups and interviews
Project Objectives: Collect data on senior population/services of So. Maine. Inform strategic plan with data collected from the southern Maine public about senior needs and services; Develop outcome measures for strategic plan objectives

Senior News Outreach

Skill Set: Sales or fundraising experience would be helpful but not mandatory.
Project Objectives: Maintain and/or increase revenue - Broaden the sectors represented in the paper - Research distribution methods.

* Expand the Role of Volunteers in the Nutrition Program

Skill Set: Not-for-profit organization/program management and experience working with volunteers
Project Objectives: Identify new volunteers roles in the Nutrition Program – Develop blueprint for a Nutrition Program Advisory Council

* Nutrition Program Market Research

Skill Set: Survey design and research
Project Objectives: Develop a survey to identify client preferences for food content, packaging and pricing.

Nutrition Program: Develop Institutional Partnerships

Skill Set: Marketing and Sales or Program Development.
Project Objectives: Develop and implement a plan for identifying institutional partners for the Nutrition Program and securing their participation in the program.

Departmental Financial Analysis

Skill Set: Accounting, finance, financial and credit analysis
Project Objectives: Determine the financial strength of each department by studying the operating revenues and expenses of the department and its reliance on fund raising and unrestricted funding support from Southern Maine Agency on Aging.

Data Automation Study

Skill Set: Familiarity with trends in automated data collection, WAN and LAN technologies and data security
Project Objectives: Perform an analysis of the data collection and entry processes of key Southern Maine Agency on Aging service programs, with an eye toward the feasibility of using current smartcard and/or similar technologies to increase automation.

Development Researcher

Skill Set: Experience with research, either on-line or through other resources
Project Objectives: In order to engage, inform, and interest possible donors, we need to know more about them: what they give to, what organizations they are involved in, what they value etc.

Development Municipal Advocate Network

Skill Set: Experience working with volunteers, and knowledge of municipal/town governments and politics
Project Objectives: Create a volunteer network of Agency advocates to speak at town meetings on behalf of the Agency requests.
* Emergency Preparedness

Skill Set: Knowledge of emergency preparedness strategies and experience developing emergency plans.

Project Objectives: To develop, teach and test a business continuity plan for Southern Maine Agency on Aging.

Child Care Connections Business Marketing Tool Kit Developer

Skill Set: Research skills, Multimedia Presentation design skills

Project Objectives: develop CD ROM for marketing the value of employer-supported childcare resources and information for employees

* Volunteer Orientation - Overview of SMAA Services CD

Skill Set: Multimedia Presentation design skills

Project Objective: develop a tool to educate our volunteers about the programs offered by Southern Maine Agency on Aging

* Information & Support for Seniors

Skill Set: experienced social worker, educator, librarian or similar “people skills” position; interest in aging issues and senior resources

Project Objective: Increase staffing to improve the quality of phone assistance and face-to-face appointments with clients.

Capacity Corps Ambassador

Skill Set: Experience with and access to professional networks in southern Maine; Good interpersonal skills

Project Objective: Increase the number of recruited volunteer professionals and identify nonprofits who would like the services of a Capacity Corps volunteer

* Financial Professionals

Skill Set: Experience with accounting and financial statements, writing ability to explain them in lay terms

Project Objective: Develop an accounting manual for Southern Maine Agency on Aging’s Board of Directors and other stakeholders

* Nonprofit Development

Skill Set: Understanding of charitable giving, ability to process and organize information, good interpersonal skills, and willingness to ask for a contribution

Project Objective: To plan and implement a Planned Giving component for the Agency’s fundraising program

* Public Relations – Interviewing and Writing

Skill Set: Interpersonal skills, interviewing skills, note-taking skills and the ability to write clearly and concisely

Project Objective: Increase the number of feature articles to provide important information in the Senior News

* Southern Maine Agency on Aging Ambassador

Skill Set: Experience in public speaking, interest in and ability to learn about services for the elderly

Project Objective: Provide verbal presentations about the work of Southern Maine Agency on Aging to community groups
Southern Maine Agency on Aging RSVP Capacity Corps Replication Guide

Project Book

Strategic Planning Data Analysis

Project Manager: Laurence Gross, Executive Director

To meet our mission Southern Maine Agency on Aging is in the process of creating a viable but flexible strategic plan to implement clearly defined goals. This plan will include action steps and specific tasks, identify the individual/s responsible for performing action steps/tasks, a timeline for completion, and, to the degree possible, create a budget outlining associated costs. To create a strong foundation for the creation of the Agency Strategic Plan, we need to perform a detailed analysis of population and service delivery data.

Toward this end we are looking for an experienced Capacity Corps volunteer strategic planner to work with us to collect information on the senior population of southern Maine and the services currently being delivered to them, to organize relevant information in a form that is easy to use, to apply the information to the development of the strategic plan, and to develop measurable outcome measures for Southern Maine Agency on Aging services to include in the strategic plan.

We are looking for a time commitment of 4 – 6 hours a week for a period of 6 months - 1 year. Telecommuting is possible but some face to face contact with Executive Director, Strategic Planner, and other staff is involved.

Strategic Planning Stakeholder Consultant

Project Manager: Laurence Gross, Executive Director

To meet our mission Southern Maine Agency on Aging is in the process of creating a viable but flexible strategic plan to implement clearly defined goals. To create a strong foundation for the Agency Strategic Plan, we are looking for Capacity Corps volunteers to conduct focus groups, key informant interviews and public hearings to collect information from the southern Maine public about senior needs and services to meet those needs. A volunteer will need knowledge of or an interest in aging and aging services, experience conducting focus groups and interviews, and superior organizational, communication and team work skills.

Identified project needs include:

1. A volunteer to arrange and conduct focus groups and key informant interviews and then format the information into a report for the Strategic Planner to use in creation of the strategic plan.
2. Once the strategic plan is created, a volunteer to arrange and conduct public hearings on the plan, and format information from the public hearings into a report for the Strategic Planner to incorporate into the plan.

The project is estimated to take an average 6 hours a week time commitment over a 6 month to 1 year period. Telecommuting is possible but some face to face contact with Executive Director, Strategic Planner, and other staff is involved.
Senior News Outreach

Project Manager: Eileen Whynot, Director of Community Relations

To assure that “Senior News”, the bi-monthly newspaper of the Southern Maine Agency on Aging, continues to thrive and customers and readers are happy with results, the Community Relations Department is looking for Capacity Corps volunteers with communication and organizing skills to help maintain or increase ad revenue, broaden the sectors represented in the paper, and research distribution methods. Sales or fundraising experience would be helpful but is not mandatory.

There is a great deal of flexibility in how we can accomplish our goals, and, while the project is ongoing, volunteers can commit to a set number of hours and a period of time that complements their needs and availability. Depending upon interests and talents, a volunteer could help with one, some, or all of the following project strands.

1. A volunteer to research businesses and individuals who are potential supporters of the newspaper and develop these prospects by e-mail, phone, fax and mail.
2. A volunteer to secure ad placements and contracts, receive ads and/or concepts and content for ads and e-mail to graphic designer, and review completed ads and correspond with client and/or their ad agency rep.
3. A volunteer to prepare spreadsheet for billing purposes, review bills prior to mailing, and follow up with clients as needed.
4. A volunteer to review the current distribution system and make recommendations for an improved distribution system.

The Role of Volunteers in the Nutrition Program

Project Manager: Ted Trainer, Director of Healthy Aging

The Nutrition Program of the Southern Maine Agency on Aging is looking for a Capacity Corps volunteer with experience working with volunteers in a non-profit arena to work with SMAA staff and the Common Good Ventures program to learn how the Nutrition Program works and could work, with a focus on expanding the role of volunteers in the program.

The project outcome will be a report that includes the following strands:

a. Identifying parts of the Nutrition Program where volunteers can be effectively used and preparing job descriptions for possible volunteer roles.
b. Identifying how these volunteers can be recruited, trained and managed.

It’s estimated that the project will entail a part time commitment over a 3 month period, but the schedule and time commitment is flexible. Telecommuting is possible but some face to face contact with Southern Maine Agency on Aging staff is involved.
**Nutrition Program Market Research**

Project Manager: Ted Trainer, Director of Healthy Aging

To develop specific strategies for expanding the Nutrition Program we are looking for Capacity Corps volunteers to work with us to perform market research to determine 1) market penetration in each municipality; 2) attitudes of meal users vs. non-users; and 3) client preferences regarding food content, packaging and pricing. A volunteer could work on one or more of the following project strands:

- Work with Southern Maine Agency on Aging Strategic Planning, Nutrition Program and IS Department staff to develop a data base that links municipal level demographic trends with market penetration by the Nutrition Program.
- Develop and implement a survey instrument to measure attitudes of meal users vs. non-users. Analyze and present the resulting data in a report format.
- Develop and implement a survey instrument to measure client preferences regarding food content, packaging and pricing. Analyze and present the resulting data in a report format.

It’s estimated that the project will entail a part time commitment over a 4 month period. Both the schedule and time commitment is flexible. Telecommuting is possible but some face to face contact with Southern Maine Agency on Aging staff is involved.

**Nutrition Program: Institutional Partnerships**

Project Manager: Ted Trainer, Director of Healthy Aging

The Nutrition Program of the Southern Maine Agency on Aging is looking for a Capacity Corps volunteer to develop and implement a plan for identifying institutional partners for the Nutrition Program and securing their participation in the program. The project is slated for after the completion of the Nutrition Program marketing projects and the anticipated health benefits study.

Project tasks include:

- A review of the literature on the health agencies in the area that could provide Meals on Wheels referrals.
- A review the Southern Maine Agency on Aging records to ascertain which institutions have been referring clients.
- Ascertaining from those who are referring clients the information they have about the program and how they are using it.
- Developing the necessary marketing materials.
- Visiting the targeted institutions and secure their participation in the program.
- Create a report containing the list of all the possible institutional partners and a record of each effort to secure their participation.

It’s estimated that the project will entail a part time commitment over a 5 month period, but the schedule and time commitment is flexible. Telecommuting is possible but some face to face contact with Southern Maine Agency on Aging staff is involved.
**Departmental Financial Analysis**

Project Manager: Tom O’Connor, Director of Finance

The Finance Department is looking for Capacity Corps volunteers with experience in accounting, finance, financial and credit analysis to help us determine the financial strength and viability of each of the 22 departments at Southern Maine Agency on Aging by studying the operating revenues and expenses of the department and its reliance on fund raising and unrestricted funding support from Southern Maine Agency on Aging.

A spreadsheet for each department summarizing categories of funding, including unrestricted funds, and expenses would allow us to draw conclusions as to the financial viability of each department.

A volunteer can commit to doing the project work entailed for one, some, or all (22) departments. We estimate the project will require an average of 3 – 10 hours per department.

**Data Automation Study**

Project Manager: Dan Knox, IS Manager

The Information Services Department of the Southern Maine Agency on Aging is looking for a Capacity Corps volunteer to research and/or draw upon existing knowledge of industry standards and practice to identify technologies for meeting the overall goal of increased data automation for SMAA Nutrition and Supportive Housing Programs.

The volunteer will work with Program Managers to develop an understanding of current data collection processes and requirements and current data storage and reporting processes and requirements and then analyze the potential of each data automation technology (smart card, bar code readers, palm pilots, WAN, etc.) to meet the needs of the department.

The project summary report; depending on project findings and progress, may range from a feasibility review to an actual implementation blueprint.

It’s estimated that the project will entail a minimum commitment of 35-40 hours total work, and the schedule is flexible depending on the interest and background of the volunteer. Telecommuting is possible but some face to face contact with Southern Maine Agency on Aging staff is involved.

**Development Prospect Researcher**

Project Manager: Peg Brown, Director of Development

In order to engage, inform, and interest possible donors the Development Department is looking for Capacity Corps volunteers with research skills and knowledge of or interest in learning the role of prospect research in development. This work can make the difference between the Southern Maine Agency on Aging receiving a major gift or not.

The Development Researcher will research individual, organizational, corporate and foundation prospects. Staff will provide direction on what needs to be researched and how to use on-line
and print resources that are particularly recommended for development purposes. An appreciation of the confidentiality of information gathered is expected, and the volunteer will complete prospect information sheets and discuss the results with staff.

The project is ongoing and there is a great deal of flexibility in how we can accomplish this work. A commitment of 2 or more hours a week for a period of time that meets the needs and availability of the volunteer would be ideal. Work could be done at home with occasional face-to-face meetings, or in the development office at the Southern Maine Agency on Aging.

**Development: Municipal Advocate Network**

Project Manager: Peg Brown, Director of Development

The Development Department is looking for Capacity Corps volunteers with knowledge or an interest in municipal/town governments and politics to give a fresh perspective and help managing information about and improving our relationship with each of the 53 towns and cities in Southern Maine that we rely on for around $100,000 a year in unrestricted funds for Southern Maine Agency on Aging (SMAA) programs. Identified needs include:

1) A volunteer with the ability to assemble/present financial and program data in a report format to be used at town meetings to support our requests for funds. Experience creating reports from different data sources would be helpful

2) Volunteers who would work with us to create our vision of a network of volunteer advocates to speak at town meetings and budget meetings on behalf of SMAA requests for funding. There is a great deal of flexibility in how we can accomplish our goal – the following are examples of how many hands could make it light work:

- A volunteer(s) could agree to work on recruiting advocate speakers for a town, a few towns, a city, a county or some combination depending upon time availability
- A volunteer could serve as trainer of volunteer advocates recruited by others
- A volunteer practiced in the art of public speaking could volunteer to be the advocate for specific town(s), city(s) or regions.

**Emergency Preparedness**

Project Manager: Margaret Cushing, Referral Specialist, Child Care Connections

Southern Maine Agency on Aging needs to develop, teach and test a business continuity plan and gather and disseminate appropriate emergency preparedness materials to our clientele: older people and their families, children and their families and child care providers.

A Capacity Corps volunteer, experienced in emergency preparedness and planning, is needed to guide project staff in the following areas:

- Outline all essential functions of Southern Maine Agency on Aging, including Child Care Connections that need to continue during an emergency situation.
- Develop plans to obtain what is needed to assure that essential functions can be carried out, including roles and responsibilities of staff and volunteers.
- Ensure that all contractors have emergency plans of their own in place (a contract provision)
• Gather all information into an easy-to-use emergency plan.
• Provide training on the plan to all appropriate staff and volunteers
• Run appropriate emergency plan drills, based on drill results amend plan and re-teach it.
• Gather materials that outline what our clientele would need in order to be safe in any emergency, Organize plan for teaching and disseminating the material.
• Carry out plan for community disaster education, as appropriate.

It’s estimated that a time commitment averaging 4 hours a week over a six month period will be necessary to complete the project.

**Business Marketing Tool Kit Developer**

Project Supervisor: Linda Elias, Director, Child Care Connections

Child Care Connections is seeking Capacity Corps volunteers to work with program staff to develop a multimedia presentation on CD ROM for use in marketing to businesses the value of employer-supported childcare resources and information for employees. Knowledge of or an interest in business family friendly policies would be helpful, and a volunteer could work on one or more of the following project strands:

• Research existing resources and find additional data, such as tax benefits and legal issues, required to customize the information for employer sponsored or supported child care in Maine.

• Use Multimedia presentation design skills to develop an outline/sequence of information to include and create a multimedia presentation in a user-friendly CD format.

The target completion date is summer 2008, and it’s estimated that a time commitment of 4 hours a week or more would be a significant contribution toward meeting this goal.

**Volunteer Orientation Project**

Project Manager: Eileen Whynot, Director of Community Relations

The Community Relations department is looking for a Capacity Corps volunteer to take the lead on developing a tool to educate our volunteers about the programs offered by the Southern Maine Agency on Aging. Due to the wide geographic spread and diverse roles of our 800 volunteers, it has been difficult to hold group orientations, and our experience suggests that disseminating information in a reading material format has not been an effective method of cross-selling SMAA programs and volunteer opportunities.

We are therefore looking to produce a DVD that would feature volunteers (and a few sound bites from staff or a narrator) telling the story of meaningful volunteering through Agency on Aging programs and services. Through their own testimony volunteers will appeal to their peers and inform them of the services offered by the Agency on Aging. The DVD would be mailed to all volunteers where they could either watch it on a computer or their DVD capable TV. We would ask volunteers to sign a form stating that they viewed the DVD and ask them to evaluate the DVD for effectiveness through a “quiz” about the content.

We have a targeted completion date of summer 2008. However, there is a great deal of flexibility in how we can accomplish our goal, and volunteers can commit to a schedule that complements their needs and availability.
Information & Support for Seniors

Project Manager: Katlyn Blackstone, Information & Advocacy Director

The Mission of the Southern Maine Agency on Aging is to ensure that older people living in Southern Maine, especially those who are frail, living alone, or have low-income, receive the support necessary to maintain their independence in the community. Central to this mission, the Information & Advocacy Department offers information and referral services to seniors through both phone assistance and face-to-face appointments. In order to increase both capacity and quality of our services in this area, it is important that we foster our ability to respond to “live” phone calls throughout the day with less reliance on voice mail that is frustrating to many of our clients.

Toward this end, we are looking for Capacity Corps volunteers with experience as a social worker, educator, librarian or in a similar “people skills” position to help us augment staffing by triaging calls and walk-in customers, responding to requests for basic information, referring calls to designated “point persons” for follow up, and confirming appointment needs. While training will be provided, prior knowledge or an interest in learning about aging issues and resources is recommended for this position.

We are looking for an initial 6 month commitment for 4 – 6 hours a week on a regular schedule with some flexibility possible.

This is an opportunity to be part of a wonderful team and to truly make a difference in the lives of seniors and caregivers in Southern Maine

Capacity Corps Ambassador

Project Manager: Ken Murray, Director of Volunteer Services

RSVP Capacity Corps is a cadre of volunteers age 55 and older with skills that can help nonprofit organizations increase their capacity to meet their missions in the community. The Capacity Corps Ambassador will help with recruiting these volunteer professionals and/or identifying and orienting nonprofits who would like to receive the services these volunteers can provide.

As a representative of RSVP Capacity Corps and Southern Maine Agency on Aging to the wider community, our ambassador will need excellent interpersonal skills and will need to become familiar with SMAA programs and services.

In order to be an effective recruiter, the Capacity Corps ambassador will need access to professional networks in southern Maine, and enjoy participating in professional networking activities. Prior knowledge – or an interest in learning about – the adult civic engagement movement and nonprofit structure and services is required for this particular project. Training will be provided.

We’re looking for a commitment of a few hours a week over an initial period of six months (with flexibility for vacations, travel, etc.). The time commitment can be longer, as RSVP Capacity Corps will be an ongoing program. The work can be scheduled as convenient for the volunteer,
with the understanding that meeting with nonprofits will most likely have to take place during regular business hours.

**Financial Professionals**

Project Manager: Tom O’Connor, Finance Director

Southern Maine Agency on Aging is a private, 501(c)(3) nonprofit charitable organization that serves as the area agency on aging for York and Cumberland counties in Maine. The Agency receives funding from a variety of federal, state, county and municipal sources as well as money raised in the local community to support our work. It is a complex system, and the Board of Directors has made a request to the Finance Director for a manual which would explain it all, including a glossary of terms.

We are looking for a volunteer with an accounting background who can review the Agency’s financial statements and accounts to learn how our funding structure works, and then write a manual to explain it in lay terms that will make it clear to Board members and other stakeholders.

Needed skills include experience in accounting, ability to study the Agency’s financial reports and learn about our funding structure, and the ability to write in terms that can be understood by the general audience.

The commitment would be short-term.

**Nonprofit Development**

Project Manager: Peg Brown, Director of Development

As Director of Development, Peg and her staff are responsible for raising significant amounts of funding from individuals, foundations and corporations to supplement the public funding sources and allow Southern Maine Agency on Aging to meet its mission in the community. As the number of seniors continues to rise and public funding remains stagnant or declines, the need for work in development grows in importance.

One component of a successful development program is planned giving, in which individuals make charitable gifts to the Agency through their wills and estate planning. This has not historically been an emphasis in the Agency’s development program, but it is one which the Board and management wish to create and grow.

A volunteer is needed to assist the Development Director in designing and implementing a planned giving program. The volunteer would do research on the elements of planned giving programs and make a report to the Development Director. He or she would then work with the Development Director to plan the implementation, and would also make personal contacts with potential candidates for making a gift.

Needed skills include an understanding of charitable giving, the ability to process and organize information in written form, planning skills and interpersonal skills.
Public Relations – Interviewing & Writing

Project Manager: Eileen Whynot, Director of Community Relations

Southern Maine Agency on Aging publishes six editions of its newspaper, Senior News, each year. Each edition is a 16-page tabloid (sometimes with inserts) and is read by over 20,000 people. The Director of Community Relations serves as its editor and has no assistance in producing the paper. Volunteers are needed to help by interviewing staff, clients and community leaders on topics of interest to seniors and their caregivers, and then writing articles based on these interviews.

Needed skills include interpersonal skills, interviewing skills, note-taking skills and the ability to write clearly and concisely.

This would be an ongoing project, occurring periodically between editions of the paper. Schedules would be flexible.

Southern Maine Agency on Aging Ambassador

Project Manager: Ken Murray, Director of Volunteer Services

A strategic goal of Southern Maine Agency on Aging is for the Agency to serve as the “go-to” source for information about services available to support the independence of people as they age. Meeting this goal requires a number of things of us. The staff members of our Information & Advocacy Program need access to the most up to date information and the professional skill to guide the seniors and family members who call us in accessing the services that they need. Our Director of Community Relations is responsible for using our website, our newsletter and other resources to share information with those who don't happen to call us so that they, too, can access services they need. And staff members in general have to be ready to respond to requests from community groups who want to have a presentation on the Agency and its services and/or more specific topics.

To help meet the need for speakers in the many communities we serve, we are creating a program of Agency Ambassadors. These individuals will be provided with comprehensive training and information about Southern Maine Agency on Aging, its role in the aging network, and the services we provide. They will then be equipped with appropriate materials and presentation guides so that they will be able to answer requests for speakers in their local communities.

Agency Ambassadors need to be interested in human services and services for the elderly, in particular. They need to be willing and able to receive detailed training about Southern Maine Agency on Aging and its services and to receive and process the information. They need to have skills in public speaking and leading groups.

We are looking for a commitment of a few half-days of training, after which the volunteer will need to be available for occasional speaking engagements that will be negotiated ahead of time. These may occur during the day or, occasionally, in the evening.
RSVP of Southern Maine
Southern Maine Agency on Aging

Training Outline

Module 1 – Day 1 of 2
Time: 4 hours

Objective

RSVP Capacity Corps volunteers will become familiar with the origins of the Models of Significant Service project, its local and national importance and how Southern Maine Agency on Aging plans to implement the project in southern Maine. They will learn about the range of projects available to Capacity Corps volunteers at Southern Maine Agency on Aging. Finally, they will learn about the mission, goals and structure of the Agency.

Module I – Part A: The Models of Significant Service Project

Outline

1. Background of the National Council on Aging (NCOA)
2. Issues facing not-for-profit organizations in today’s world
3. Background and objectives of NCOA’s RespectAbility Initiative
4. Summary of the research done by RespectAbility
5. RespectAbility’s Models of Significant Service project
6. Background on RSVP
7. Southern Maine Agency on Aging’s proposed Model
8. Proposed models of the other 11 grantees

Trainer

Ken Murray, Director of Volunteer Services, Southern Maine Agency on Aging

Materials Needed

1. Power Point Outline of the information to be presented
2. Hand out containing details of the information to be presented
Module 1 – Part B: The Range of Capacity Corps Projects at SMAA

Outline

A Project Book of these projects will be created. For each project, the following information will be outlined:

12. Project title
13. Project rationale – why this is a need at SMAA
14. The project supervisors name and position within the Agency
15. The project objective(s)
16. A list of the tasks needed to meet the objective(s)
17. The form of the final outcome desired
18. Amount of time commitment needed
19. Schedule of time commitment needed
20. Capacity Corps volunteer experience needed
21. Location where Capacity Corps volunteer may work
22. Other relevant information

Trainer

Ken Murray, Director of Volunteer Services, Southern Maine Agency on Aging

Materials Needed

Capacity Corps Project Book

Module I – Part C: Understanding Southern Maine Agency on Aging

Outline

A. Understanding SMAA

1. History
2. The aging network
3. Status as a not-for-profit organization
4. Duties of an area agency on aging
5. SMAA’s mission
6. Services provided
7. Financial support
8. Governance
9. Importance of volunteers

B. Issues faced by SMAA

1. Strategic planning
2. Financial planning
3. Marketing
4. Research
5. Better utilizing information technology
6. Resource development

**Trainer**

Ken Murray, Director of Volunteer Services, Southern Maine Agency on Aging

**Materials Needed**

1. Power Point Outline of the information to be presented
2. Hand out containing details of the information to be presented

**Module 2 – Day 2 of 2**

**Time:** 4 hours

**Objective**

RSVP Capacity Corps volunteers will become familiar with the workings of not-for-profit organizations, what sets them apart for for-profit organizations, and the issues they face. They will learn what is expected of them and what they can expect from Southern Maine Agency on Aging. Finally, they will become familiar with the administrative procedures for this project.

**Module 2 – Part A: Understanding Not-for-Profit Organizations**

**Outline**

A. Characteristics of not-for-profit organizations

1. Service provision
2. Tax exemption
3. Regulation
4. Unrelated business income prohibited
5. Mission driven
6. Success measured by mission accomplishment
7. Financial support
8. Governance
9. Community “owned”

B. Issues faced by not-for-profit organizations

1. Clarity of mission
2. Board composition and effectiveness
3. Mission-focused strategic planning
4. Clear operational planning
5. Rigorous financial planning
6. Resource development
7. Outreach to the community

**Trainer**

**Maine Association of Non-Profits Staff**

**Materials Needed**

**Module 2 – Part B: RSVP Capacity Corps Project Expectations**

**Outline**

A. Relationships

1. SMAA manager/director is the boss of the specific project undertaken by the Capacity Corps volunteer
2. RSVP Capacity Corps volunteer will be supervised by the SMAA manager/director
3. A collegial relationship is desired
4. Honest, open communication is required
5. Volunteers’ questions and concerns may be brought to the SMAA manager/director or to RSVP Capacity Corps staff

B. Expectations of Capacity Corps volunteers

1. Commitment to the mission of SMAA
2. Commitment to the particular project they undertake
3. Make a real effort to understand SMAA, its history and way of doing business
4. Respect for SMAA, staff and volunteers
5. Make a real effort to succeed
6. Communicate openly, respectfully and frequently

C. What Capacity Corps volunteers may expect from SMAA

1. An assignment appropriate to their skills and interests
2. Clear and specific instructions about the project with which they are engaged
3. Respectful treatment as a coworker
4. A chance to offer ideas and suggestions
5. Regular appreciation
6. Respectful evaluation
7. Capacity Corps team sharing sessions
8. A chance to make a real difference
D. Specific Capacity Corps projects

Projects designed to meet the specific capacity building needs of SMAA will be compiled into a Project Book and made available to Capacity Corps volunteers. Specific assignments will be made through dialogue between SMAA managers/directors, RSVP Capacity Corps staff and Capacity Corps volunteers.

E. Conflict of interest

Capacity Corps volunteers will be asked to sign the conflict of interest agreement that is signed by all SMAA staff and volunteers.

F. Confidentiality

Capacity Corps volunteers will be asked to sign the confidentiality agreement that is signed by all SMAA staff and volunteers.

G. Prohibition of Sexual Harassment

Capacity Corps volunteers will be asked to sign the prohibition of sexual harassment agreement that is signed by all SMAA staff and volunteers.

Trainer

Ken Murray, Director of Volunteer Services, Southern Maine Agency on Aging

Materials Needed

Project organizational chart
Printed list of expectations
Capacity Corps Project Book
Conflict of Interest Agreement form
Confidentiality Agreement form
Prohibition of Sexual Harassment form

Module 2 – Part C: Administrative Matters

Outline

Administrative procedures will be reviewed, as follows:

1. RSVP Capacity Corps supervisor
2. RSVP Capacity Corps staff
3. Specific project supervisors
4. Keeping track of hours spent on the project
5. Reporting hours spent on the project
6. Requesting reimbursement of expenses
7. Procedure for handling questions or concerns

**Trainer**

RSVP Capacity Corps Coordinator

**Materials Needed**

Requisite forms
RSVP Capacity Corps

Pioneers in a new model of volunteer community service

A research and demonstration project of the National Council on Aging. The goal is to recruit volunteers age 55 and older with skills that can help nonprofit organizations increase their capacity to meet their missions in the community

Volunteers are needed with skills in these areas

☆ Strategic Planning
☆ Marketing
☆ Public Relations
☆ Business Planning
☆ IT
☆ Development
☆ Emergency Plans

Or tell us what you would like to work on.

Most projects require a short and flexible time commitment that can easily accommodate travel plans or work or other commitments. It is also possible for a volunteer to help with part of a project or parts of several projects.

We encourage you to give us a call to explore options – we are happy to discuss possible projects tailored to your skills and interests

Join a Team of Volunteer Professionals

☆ Where your experience, wisdom, and talents count

☆ Where you can feel the collective energy that comes from working together to solve problems

☆ Where your freedom will not be compromised - you set the boundaries for your time availability

Southern Maine Agency on Aging
136 U.S. Route One
Scarborough, ME 04074
(207) 396-6500
www.smaaa.org

RSVP Director
Ken Murray
(207) 396-6520
kmurray@smaaa.org

Capacity Corps Coordinator
Paddy Clark
(207) 396-6538
pclark@smaaa.org
Strategic Planning

Nonprofits may need volunteers with strategic planning experience to create plans to help them increase their capacity to meet their missions.

Needed skills include the ability to research, collate, and analyze data and experience framing outcome measures.

Marketing

Nonprofits often say that they are the best kept secret in town. They may need volunteers with expertise in designing and implementing marketing plans to help them increase the visibility of their organizations, inform the public about what they accomplish and increase public support for their missions.

Need skills include market research and plan development.

Public Relations

In addition to developing marketing plans, nonprofits may need volunteers to help them develop specific public relations efforts such as publishing newsletters, creating public service announcements, working with community media outlets, developing websites, etc.

Needed skills include writing, media relations, desktop publishing, community relations and website design.

Financial and Business Planning

Nonprofits are often started by altruistic people who may or may not have extensive experience in financial and business planning. As nonprofits grow, having this experience becomes essential to their success. Volunteers may be needed to help the nonprofit develop a sound business plan and appropriate financial controls.

Needed skills include business planning, accounting and financial analysis.

Information Technology

Most nonprofits today use some form of information technology to aid in communication and record keeping. The question is, are they using the right technology and are they using it effectively. Volunteers may be needed to help nonprofits analyze their communication and information needs, review their current use of information technology to meet those needs, and help guide the nonprofit in ways to use IT more effectively.

Needed skills include analyzing an organization’s communications and data needs, familiarity with trends in data collection and analysis, as well as hardware and software products that are available.

Nonprofit Development

For the most part, nonprofits depend on donors to provide a major part, if not all, of the funding they need to operate and fulfill their missions in the community. Development is the term used to describe the process of identifying, approaching, cultivating and maintaining donors and making effective use of their contributions. Volunteers may be needed to help in this effort.

Needed skills include the ability to plan a development effort, research donor prospects, mobilize other volunteers, connect with prospective donors, ask for support and keep appropriate records.

Emergency Preparedness

All organizations need to develop business continuity plans so that they can continue to operate when an emergency strikes. Volunteers may be needed to help develop such plans.

Needed skills include knowledge of emergency preparedness strategies and the development of emergency plans.

These are just some of the ways that volunteers with high level skills can help nonprofit organizations in their communities.
RSVP of Southern Maine
Southern Maine Agency on Aging
Capacity Corps Business & Professional Skills Checklist

The categories below identify the types of assistance Capacity Corps volunteers might be asked to provide to nonprofit organizations. Please review each skill definition carefully and check only those areas in which you are willing and able to help the nonprofit organizations that request our assistance. Your knowledge should be current, and your background information should effectively support your selections. (courtesy National Executive Service Corps)

**Board Development**
- Member Recruitment [ ]
- Board/Staff Relations [ ]
- Roles & Responsibilities [ ]
- Committee Structure [ ]
- Operational Effectiveness [ ]

**Coaching**
- Coaching [ ]

**Computer Systems/Information Management**
- Application Programs [ ]
- Approach and Selection
- Data Communications Planning [ ]
- Database Selection & Admin. [ ]
- Equipment & Software Planning [ ]
- Information Technology [ ]
- Strategy
- Internet Research [ ]
- Personal Computers [ ]
- Other __________________ [ ]

**Facilitation**
- Retreats [ ]
- Workshops/Seminars [ ]
- Meetings [ ]
- Other __________________ [ ]

**Facilities**
- Architectural [ ]
- Site Selection [ ]
- Relocations/Buying/Leasing [ ]
- New Construction [ ]
- Remodeling [ ]
- Property Development [ ]
- Interior Design/Space Plan [ ]
- HVAC [ ]

**Finance**
- Accounting [ ]
- Reporting and Controls [ ]
- Financial Planning [ ]
- Budgeting [ ]
- Nonprofit Tax Forms [ ]
- Cash Flow Forecasting [ ]
- Other __________________ [ ]

**Fundraising**
- Strategies [ ]
- Annual Giving Campaigns [ ]
- Planned Giving Programs [ ]
- Capital Campaigns [ ]
- Fundraising Events [ ]
- Write/Critique Grant Proposals [ ]
- Municipal Fundraising [ ]
- Research [ ]
- Other __________________ [ ]

**General Management**
- Managed one or more departments of a company or governmental unit [ ]

**Human Resources**
- Compensation [ ]
- Job Descriptions [ ]
- Benefits [ ]
- Performance Planning [ ]
- Or Appraisal
- Policies/Practices [ ]
- Recruiting/Interviewing [ ]
- Staff Morale/Team Building [ ]
- Training and Staff Development [ ]
- Employee Communications [ ]
- Volunteer Management [ ]
- Other __________________ [ ]

**Marketing**
- [ ]
Southern Maine Agency on Aging
RSVP Capacity Corps

Definitions for the
Skills and Professional Experience Checklist

BOARD DEVELOPMENT
Knowledge and expertise in areas such as: diagnosing issues in governance; board/staff relations; the board self-renewal process; effective internal operations of the board and its committees; developing board leadership.

COACHING
Coaching is the art of effective listening and asking powerful questions to lead to self-discovery on the part of the client. It assists clients in establishing their personal goals and then supports them in achieving the goals. A good coach has the ability to build rapport, ask probing questions, listen, and give feedback.

COMPUTER SYSTEMS & INFORMATION MANAGEMENT
(Consultants must be willing to keep current with their field(s) of expertise.)
Application program selection: The insatiable need for easy-to-use, integratable and sophisticated programs include both general use and enterprise specific applications. Examples in this later category include application programs in food distribution, mental health assessment, environmental planning and student grading. Programs are selected for decision support, executive information summarization, imaging/multi-media capabilities, statistical/graphical analysis, development tools and integration with common office suites, i.e., words processors, spreadsheets and presentation graphics. Recommended application programs must fit into equipment, software and networking architecture of the client’s environment.
Data communication planning: Considerations encompass local and wide area networking, remote dial-up access from a mobile work force and wireless communications. Faxing, E-mail and interactive computing capabilities are chosen among different network topologies, network operating systems, network protocols, communication products and carrier services.
Database Selection: Often arising from new legal or competitive issues to provide more detailed and analytical reporting, a modern database must be installed. Selecting criteria include interfacing and integration with existing files and older generation databases, database administration and security tools, client/server division of functions, query and report generation capabilities, SQL development tools and ability to handle transactional volumes.
Equipment & software planning: The range of hardware includes large central processors, mid-range processors, workstations, personal computers and laptops. Printers, CD ROM, hard drives, scanners and plotters are examples of associated equipment. Operating system software, transaction monitors, utilities, and performance tools are most often directly related to the selection of the appropriate “platform” for the client. Vendor sources and costs are usually shown in the recommendations.
Information Technology Strategy: Formulation of a three- to five-year plan to integrate information technology with the business direction of the enterprise. All operational activities of the organization are reviewed, work flows are charted and reporting relationships examined. Recommendations include opportunities to displace labor intensive tasks, elimination/reduction
of paper processes, identification of special computer programs that can improve the quality of delivered services, and upgrading of staff skills through focused training and education. Transitional steps and estimated costs are detailed in the strategic plan.

**Internet Research:** Understanding of the Internet, search strategies, and how to interpret what you find.

**Personal Computers:** Hands-on experience in the operation of personal computers for word processing and similar applications. Familiarity with personal computer operating systems such as DOS, Windows, Office, or the Macintosh operating system and applications. Ability to learn and use new applications with minimal coaching.

**ENDOWMENT FUNDING**
*(Consultants must participate in ESC’s training program for Endowment funding before being assigned to a project in this area.)*

Knowledge of using planned giving methods to raise endowment gifts to support the long-term needs of an organization.

**FACILITATION: Retreats, Workshops/Seminars, Focus Groups**

Basic facilitation competencies include planning, designing, delivering and evaluating group meetings, workshops and retreats along with public speaking.

**FACILITIES**

**Architectural:** Experience in the many fields that constitute the practice of architecture. Ability to identify the needs to be satisfied for a particular project. Knowledge of the elements that comprise a Program of Requirements. Familiarity with the associated disciplines of structural, mechanical, electrical and acoustical engineering. Knowledge of space planning, design requirements, applicable state and local codes, and professional fees.

**Construction:** Ability to prepare a Program of Requirements to define a project as well as experience in developing construction documents, drawings and specifications or in utilizing them. Experience in negotiating contracts with construction companies, assuring that all work complies with state and local codes and in providing for continuous inspection of all work.

**Equipment Planning:** Ability to analyze current and future equipment requirements including location and cost.

**Facility Mgmt/Maintenance:** Experience in preparing a program of requirements for the management and maintenance of facilities, including a schedule for engineering inspections of equipment. Knowledge of manufacturers’ equipment specifications, city and state codes, and OSHA requirements. Knowledge of job requirements for the building manager and janitorial staff.

**Property Development:** Experience in developing properties including making evaluations of the suitability of various properties including determining or having determined the social, economic, environmental and ecological impact of the development as well as experience in developing an appropriate financial analysis.

**Relocation/Buying/Leasing:** Experience in reviewing relocation plans from a strategic and financial viewpoint. Ability to prepare a comparative analysis of the advantages of buying vs. leasing.

**Remodeling:** Ability to prepare a Program of Requirements to define a project as well as experience in developing construction documents, drawings and specifications or in utilizing
Experience in negotiating contracts with construction companies, assuring that all work complies with state and local codes and in providing for continuous inspection of all work.

**Site Selection:** Experience in determining the functions of sites being sought and determining the required specifications. Experience in obtaining historical and other relevant information on available sites and then preparing comparative information on these sites including their suitability and costs.

**FINANCE**

*(Consultants must be willing to keep current with their field(s) of expertise.)*

**FUND DEVELOPMENT**

**Annual Giving Campaigns:** Knowledge of constituency building, volunteer solicitor training, special events, and corporate and foundation funding.

**Earned Income:** Understanding of range of options for earned income: fees for service, membership fees, tuition, ticket/product sales, enterprise development, unrelated business income, etc. Ability to conduct analysis of current options and assessment of new options including feasibility studies and development of business plans.

**Write/Critique Grant Proposals:** Knowledge of sources of philanthropic contributions, research requirements and guidelines for the potential sources of funding. Ability to decide on best approach (letters, personal visits, etc.) and follow up. Excellent writing skills.

**GENERAL MANAGEMENT:**

**General Management:** Managed one or more departments or a company or government unit.

**HUMAN RESOURCES**

**Benefits:** A thorough knowledge in at least three (3) of the latest trends and developments in employee benefit programs, including: education, planning and administration, training, health care and medical plans, insurance (life, disability), pension programs (company and individual), bonus plans (direct and indirect), vacation plans, paid holidays, flexible working hours. An ability and willingness to keep current on these subjects.

**Compensation:** Determination of pay equities - internal, selection and use of job evaluation tools. Design and analysis of wage and salary surveys. Effect of benefits on total compensation structure. Determination of salary grades. Steps and automatic pay adjustments vs. “merit” adjustments. Salary administration procedures - keeping program current.

**Employee Communications:** An understanding of the wide array of techniques available with an appreciation of those best applicable to a given situation to achieve specific, definable goals. Includes knowledge of the preparation and administration of crisis management plans.

**Job Descriptions:** Determination of the purpose(s) - screening applicants, training of new employees, evaluating relative value to the organization - and the different requirements of each purpose. Selection and implementation of a procedure for obtaining information on job content-interviews-questionnaires-observation. Determination of who should prepare (incumbents or supervisors) and who should review. Selection of a procedure to keep job description current.

**Performance Appraisal:** Determination of how performance should be measured, i.e., accomplishment of specific goals, who should determine goals (incumbent, supervisor, both), relative importance of objectives. Frequency of evaluations and feedback. Relationship of
performance appraisals to job descriptions. Relationships of performance appraisals to compensation.

**Policies/Practices:** Determination of appropriate policies. Documentation of policies. Preparation of policy manuals. Communication of policies. Legal considerations such as Americans with Disabilities Act, Fair Labor Standards Act, Federal Wage and Hour Law, etc. Consultant should be familiar with latest applicable government regulations and laws.

**Recruiting-Interviewing:** Determination of appropriate recruiting sources. Defining position requirements and compensation range. Determination of who should interview and how selections will be made. Conducting screening and selection interviews. Familiarity with appropriate laws and regulations-EEOC, Affirmative Action, Americans with Disabilities, etc.

**Staff Morale/Team Building:** Understanding of the factors influencing morale and the characteristics of effective teamwork. Analysis of staff morale. Ability to identify problem areas and make recommendations for improvement. Evaluate staff’s ability to work as a team. Assist staff in team building skills.

**Training and Staff Development:** Conduct a training needs assessment; identify job and/or task competencies; develop training objectives. Design interactive training tailored to established competencies. Conduct an interactive workshop, serving as facilitator. Evaluate training programs and recommend improvements. Typically, ESC volunteers would not be expected to write training programs.

**Volunteer Management:** Conduct an assessment of the volunteer management process, including program planning, job development and design, recruitment, screening and interviewing, orientation and training, super-vision and motivation, recognition and evaluation. Determination of appropriate policies, procedures and tools to enhance an effective volunteer program. Evaluate staff involvement and attitudes, as well as organizational climate.

**MARKETING**

**Advertising:** Ability to assess the communication needs of the client, understand strengths/weaknesses of competitors and the marketing environment; this often requires the use of a variety of research techniques. Advertising includes art direction, copywriting, and the ability to deliver the message to the target market at the lowest cost.

**Brochures:** Ability to see and understand subject matter from point of view of target readers. Basic grasp of typography and design, an understanding of fundamentals of how to attract readers. Some knowledge of printing costs.

**Direct Mail:** Familiar with the process of planning, writing and designing direct mail materials and stand-alone letters. Some knowledge of mailing lists, post office regulations, printing and mailing costs. Familiarity with testing procedures. Able to advise realistically on potential response rate and on benefits relative to costs.

**eMarketing:** Knowledge in marketing products or services online. Background in basic rules of email marketing, building opt-in lists, writing for this arena, and understanding how SPAM filters work.

**Focus Groups:** Understanding of and experience in facilitating focus groups. Ability to identify research objective(s), address whether a focus group is the best way to gather the information, assess client readiness to act upon results, and determine feasibility under prevailing conditions. Requires background in planning, recruiting for, staging and reporting findings of focus groups.

**Marketing Planning:** The marketing plan establishes specific goals and objectives, a time frame and responsible individuals. Ingredients include situation analysis, strengths/weaknesses, problems/opportunities, as well as a tactical action plan.
Market Research: Ability to understand and determine best research method(s) required to obtain information, as well as develop the research plan. Ability to design questionnaires and recruitment letters. Ability to define and articulate research goals as well as to direct the work of a research team.

Merchandising: Involves all functions having to do with bringing goods to the point of sale, including product assortment, quantities, timing and pricing. Establish/interpret and execute merchandising policies; develop and implement a business plan; establish and maintain a merchandise control system; plan promotional programs; maintain good relations with suppliers; recruit, train and motivate staff.

Promotion/Promotional Events: Knowledge of marketing tools and those of promotion; ability to select among them to put together cost-effective programs for each stage of distribution. Ability to work well with artists and copywriters and to recognize good copy and design. Understanding of mechanical production. Knowledge of how to select and use fulfillment suppliers.

Website for Marketing: Knowledge of how to use the organization’s website as an effective marketing tool.

OPERATIONS ANALYSIS

Distribution: Knowledge of different types of distribution systems and how they interact with warehousing and transportation. Ability to determine cost effectiveness of distribution operations and whether to own or out-source delivery system. Ability to determine optimum size shipping packs.

Food Services: Knowledge of food sanitation principles and regulations, food service equipment, menu planning/costing, and food preparation/service systems design.

Inventory Control: Understanding of how inventory control systems function with respect to receipts, issues and automatic reorder points. Ability to work with vendors to implement bar-coding for package marking, receiving and invoicing. Ability to take inventory and identify excess inventory. Computer literate.

Life, Accident & Health Insurance: Requires a background in insurance with fairly recent hands-on experience.

Management Controls: Ability to analyze how work responsibilities are assigned and measured. Ability to examine controls over all program aspects to insure that adequate reporting is being provided.

Office Management: Knowledge of office organization, general office procedures, modern technology, methods and equipment. Ability to analyze relationships between employee workforce and paper flow to maximize communication, lessen unnecessary movement and increase the ability to operate at an efficient level.

Property & Casualty Insurance: Familiarity with various coverages most likely to be critical for a nonprofit. Sources most appropriate as insurers or as their agents or other intermediaries for the nonprofit, including options to traditional insurance, e.g., risk pool, self-insurance, etc.

Production Line Analysis: Ability to analyze a production line that uses employees on an assembly line basis. Ability to analyze the various assembly line steps to maximize employee output and simplify tasks in what are basically low level assembly operations.

Purchasing: Knowledge of purchasing policies and procedures and experience in the implementation of them. Ability to determine inventory coverage periods based on normal delivery periods, transportation factors, the impact of volume discounts, the degree of 100% in-stock necessity and seasonality. Understanding of the placement of contracts for extended requirements. Knowledge of all applicable federal/state laws, particularly if a governmental agency.
Risk Management: For Property & Casualty only, experience in risk management. How to identify, evaluate and control risks. Management of loss exposures. Ability to lead a client toward planning, implementing, monitoring and maintaining a risk management program.

Transportation: Ability to analyze transportation services provided to customers. Major areas include: truck/van fleets; knowledge of maintenance requirements; vehicle ownership (leasing vs. owning); insurance.

Warehousing: Knowledge of various techniques of material handling and able to determine physical requirements for warehousing facilities. Ability to identify efficient warehouse labor and management. Ability to set up random binning to take advantage of maximum space usage in conjunction with assuring FIFO usage. Ability to set up adequate security system.

ORGANIZATION

Business Planning:

Mergers & Acquisitions: Experience in this area involves recognition of strategic benefits possible through the synergy between organizations. Ability in contract negotiation and an understanding of how to create a mutual partnership is essential. Post merger skill in personnel and the ability to combine functions in a cost effective way with minimal negative impact is important to long term success.

Organization Studies: Able to assess the organizational structure against present and future requirements, including job descriptions, the compensation system and possibly reporting relationships. Evaluation of incumbents may be requested by client, an area requiring a great degree of confidentiality.

Executive Transition Management: Guides a non-profit board through the process of preparing for a management transition, searching/selecting a new executive and providing support as the new executive begins. Simultaneously, we help to prepare the organization for change so that it thrives as a result of transition. Knowledge and expertise in areas such as change management, executive search and recruitment, human resources, nonprofit leadership, consensus building, compensation and benefits can be helpful.

ETM Succession Planning: A succession plan outlines the steps an agency needs to take to ensure a leadership transition is as orderly as possible, whether planned or unplanned. The process of preparing the plan enhances the leadership skills of the management team by helping them identify and cover the main functions of the leader while ensuring the continuity of agency operations. Knowledge and expertise in areas such as change management, executive search and recruitment, human resources, nonprofit leadership, consensus building, compensation and benefits can be helpful.

PROFESSIONAL CREDENTIALS:

Self-explanatory

PUBLIC RELATIONS/COMMUNICATIONS/ADVERTISING

Design/Graphics: Knowledge of how to create new designs or layouts for insignias, brochures, advertising, annual reports, etc. Ability to explore ideas and graphically transfer those thoughts to paper. Knowledge of computer graphics and familiarity with applicable software.

Media Relations: Professional experience in the print, broadcast or publication fields valuable. Ability to cultivate news and media sources for strong placement about the client organization, its mission and accomplishments. Professional writing experience also of value.
Newsletters: Understanding of the publics to be reached. Writing/editing and interviewing skills. Knowledge of design elements, photography and the printing process.

News Releases: Understanding of media, their needs and deadlines, as well as what constitutes news and/or human interest stories. Ability to find, develop and write these stories.

Promotional Writing: Ability to research pertinent information about a product or service, becoming completely familiar with all aspects of it. Knowledge of how to organize the material into a useable form so that it flows logically from one point to the next, and to be able to write in a form understandable by everyone.

Public Opinion Studies/Surveys: Ability to identify research objective(s) and translate into research plan design as well as question/questionnaire design and structure. Ability to report significance of study/survey results.

Public Service Announcements: Awareness of media requirements. Ability to assist clients in defining their messages and adapting them to various publics. Basic writing/editing skills.

Strategies and Plans: Ability to establish strategic direction for public relations, including specific goals and objectives, tactical action plan, time frame and responsible individuals. Ability to determine audience(s).

SPECIAL SKILLS OR EXPERIENCE
(Note: The details about the skill you have identified can be entered in the “Details” field on the entry form.)

Cultural competence: Understanding and integrating the web of behaviors, attitudes and policies that foster effective work in multi-cultural environments. It combines knowledge of individuals, groups of people and institutions into specific practices and attitudes that respect diversity. Use the space provided for in “comments” to list any cultures for which you believe you are competent in your understanding.

Government Relations: Ability to anticipate problems and opportunities in governmental relations at the three recognized levels (federal, state, local), as appropriate for the agency. Experience in providing counsel and direction for program design to help agency adjust to changing public policies and enhance reputation with governmental constituencies. Ability to design a plan to carry out an effective public affairs program with government(s) as well as with those who influence government action, on both a macro (overall) and micro (individual) basis. Ability to design a response program to protect the agency’s interests in problems with public or governmental pressure groups.

Languages: Please specify foreign language(s) and degree of proficiency. American Sign Language.

Writing: Ability to communicate effectively in writing.

STRATEGIC PLANNING
Ability to facilitate and lead a strategic planning process to ensure that an organization has a clear purpose, sense of direction, and sound roadmap for getting where it wants to go.

TRAINING
Conduct Training: Knowledge of training methods and learning processes. Skilled in public speaking, presentation and facilitation techniques; organized with attention to details; patient and empathetic. Highly developed communication skills, including listening.

Design Training Programs: Knowledge of adult learning processes and current training techniques and methods. Ability to identify the competencies/skills needed to perform and
then develop appropriate training to develop competencies. Ability to perform a needs assessment. Ability to develop learning objectives related to desired performance.

**Manage Training Function:** Knowledge of leadership principles and general management skills. Knowledge of logistics and where to get resources. Organized. Ability to assess trainers and to evaluate training programs. Knowledge of performance improvement interventions including training strategies.

**Write Training Programs:** Same skills as needed for training program design plus excellent writing skills and the ability to identify and select most appropriate, effective training methodology.
RSVP Capacity Corps Volunteer Enrollment Form

Thank you for your interest in volunteering!

At Southern Maine Agency on Aging we have many ways in which people can volunteer to help the Agency in its mission to improve the lives of seniors and their caregivers.

In addition, we sponsor RSVP, the Retired and Senior Volunteer Program of Southern Maine, which can find volunteer opportunities for people age 55 and over at Southern Maine Agency on Aging as well as at over 100 other nonprofit or healthcare organizations in our area.

SECTION I: The following information is requested to help us find the right volunteer opportunity for you and is available only to our staff. Please print the information requested below. Thank you.

1. Name Mr./Ms./Mrs./Miss______________________________________________________________

   (Prefix)      (First)         (Middle)                (Last)                   (Suffix)

2. Gender__________________     Date of Birth_____________________________________________

3. Address___________________________________________________________________________

   __________________________________________________________________________________

   Phone (home) ________________ (office) __________________ (cell) ________________________
   E-mail address
   Best way to communicate: Home_________ Office _________ E-mail_________ Cell ___________

4. Seasonal Address (if any) ____________________________________________________________

   __________________________________________________________________________________

   Phone (home) ________________ (office) __________________ (cell) ________________________
   E-mail address
   Best way to communicate: Home_________ Office _________ E-mail_________ Cell ___________
   Effective from _________________________________ to __________________________________
   (Month/Day/Year)                                                                (Month/Day/Year)

5. Are you currently employed? _____Yes _____ No
   What is your current or most recent occupation?
   Employer Name ________________________________________________________________

6. Are you required to do community service for any reason? _____Yes _____ No
   If yes, please explain _____________________________________________________________
7. Skills Checklist (please check all that apply to you)

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<td>Other:</td>
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<td>Information Technology</td>
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Which skills would you most like to use in your volunteering at this time?

Volunteer opportunities for people of any age. Please check any that interest you.

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<th>Activities Aide in Adult Day Center</th>
<th>Health Insurance Counselor</th>
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<td>Maine Senior Games Volunteer</td>
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<tr>
<td>Benefits Counselor *</td>
<td>Marketer *</td>
</tr>
<tr>
<td>Bill-Paying Assistant</td>
<td>Matter of Balance Coach</td>
</tr>
<tr>
<td>Board or Committee Volunteer</td>
<td>Meals on Wheels Driver</td>
</tr>
<tr>
<td>Case Aide Volunteer *</td>
<td>Minor Home Repair Volunteer</td>
</tr>
<tr>
<td>Clerical Support</td>
<td>Provider Relations Volunteer *</td>
</tr>
<tr>
<td>Computer Data Entry</td>
<td>Senior Dining Center Helper</td>
</tr>
<tr>
<td>Follow-up Caller for Agency Clients</td>
<td>Telephone Reassurance Volunteer</td>
</tr>
<tr>
<td>Friendly Visiting</td>
<td>Writer *</td>
</tr>
<tr>
<td>Grocery Shopping</td>
<td></td>
</tr>
</tbody>
</table>

* Opportunity under development. If interested, please call for more information.
9. Additional volunteer opportunities for people age 55 or over only.
If you are age 55 or over, please check any that interest you.

<table>
<thead>
<tr>
<th>Activity Aide in Senior Housing</th>
<th>Hospital Volunteer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adult Tutors in Literacy Programs</td>
<td>Hotline Volunteer</td>
</tr>
<tr>
<td>Board or Committee Volunteer</td>
<td>Information Provider</td>
</tr>
<tr>
<td>Buddy for Health Program</td>
<td>Knitter</td>
</tr>
<tr>
<td>Bulk Mailing Helper</td>
<td>Library Aide</td>
</tr>
<tr>
<td>Child Care Volunteer</td>
<td>Management Consultant</td>
</tr>
<tr>
<td>Classroom Aide</td>
<td>Ombudsman</td>
</tr>
<tr>
<td>Clerical Support</td>
<td>Program Aide in Various Settings</td>
</tr>
<tr>
<td>Docent at a Museum</td>
<td>Reader to Young Children</td>
</tr>
<tr>
<td>Driver in a Volunteer Rides Program</td>
<td>Senior Center Volunteer</td>
</tr>
<tr>
<td>Entertainer at Senior Facilities</td>
<td>Tutor of Children</td>
</tr>
<tr>
<td>Health Educator or Mentor</td>
<td>Visitor in Senior Housing</td>
</tr>
<tr>
<td>Hospice Volunteer</td>
<td>plus many others too numerous to list</td>
</tr>
</tbody>
</table>

10. Interests/Activities:

- Hobbies or special skills
- Previous volunteer experience

SECTION II: To be completed should you decide to volunteer at Southern Maine Agency on Aging or through RSVP. The following information is required for our records and is available only to our staff. Thank you.

11. Emergency Contact:
   - Name
   - Address
   - Phone #

12. Do you drive? _____ License No. _______________ State _____ Expiration Date ____________

   Name of Insurance Company
   Beneficiary for Accident Insurance (if applicable)
   - Name
   - Address
   - Phone #

13. Do you wish mileage reimbursement, if available? _______ Lunch? (For RSVP only) _______

14. Do you or did you work for a company that matches charitable gifts? _________________________
   Company name

15. How did you hear about Southern Maine Agency on Aging and/or RSVP?

   _____ A Speech   _____ Expo   _____ Another Volunteer   _____ Newspaper;
   _____ An RSVP Station   _____ Senior News   _____ TV   _____ Word of Mouth
   _____ SMAA Website   _____ Other Website

Other: ____________________________________________
16. Do you wish to receive Senior News, our free, bimonthly newspaper? _____ Yes _____ No
May we list your name in Senior News as a new volunteer? _____ Yes _____ No

17. Do you wish to receive information on supporting the Agency financially? _____ Yes _____ No

18. Do you need special accommodation in order to do volunteer work? (Example: Allergies, Health Conditions, Mobility Issues, etc.) _____ Yes _____ No
If yes, please explain. ____________________________________________________________
Geographic preference as to where you would like to volunteer? ____________________________
________________________________________________________________________________

19. Do you speak a foreign language? _____ (Please list) ______________________________________

20. At what times are you available/interested in volunteering? (Check all that apply)
_____ Weekdays _____ Morning _____ Afternoon _____ Evening
_____ Weekends _____ Mornings _____ Afternoon _____ Evening
_____ Looking for a short-term, work as needed, volunteer position.
Are there times during the week that you cannot do volunteer work. ___ Yes ___ No
If yes, please explain. _______________________________________________________________

21. Local References: Please list the names and addresses of three references (not related), one of which is a professional contact; for example, teacher, minister, employer, etc. Please include full contact information.

Name: ___________________________________________________________________________
Address: _________________________________________________________________________
Telephone: Home _________ Office _________ E-mail ________________________________

Name: ___________________________________________________________________________
Address: _________________________________________________________________________
Telephone: Home _________ Office _________ E-mail ________________________________

Name: ___________________________________________________________________________
Address: _________________________________________________________________________
Telephone: Home _________ Office _________ E-mail ________________________________

I give permission to the Southern Maine Agency on Aging to obtain information from the above stated references and the Maine State Bureau of Investigations, as may be deemed necessary for the Agency.

_________________________________________   ___________________________
Signature                       Date

Please return completed form to: Volunteer Services, Southern Maine Agency on Aging, 136 US Route One, Scarborough ME 04074-9055
RSVP of Southern Maine
Southern Maine Agency on Aging
Capacity Corps Volunteer Interview Form

Volunteer Name _______________________________________________________

Interviewer Name ______________________________________________________

Vocational Background

1. Tell me about your current or most recent employment position. What was your position? What did you do? What did you like most about it? What did you like least? What was the biggest challenge in this position?

2. Tell me about your next most recent employment position. What was your position? What did you do? What did you like most about it? What did you like least? What was the biggest challenge in this position?

3. Tell me about your next most recent employment position. What was your position? What did you do? What did you like most about it? What did you like least? What was the biggest challenge in this position?

4. What do you consider the high point of your career to this point? Why?

5. What experience have you had with working in teams? How do you feel about working in teams?

Volunteer Experience and Interest

6. What experiences have you had with volunteering? How were those experiences for you? What was most enjoyable? What was least enjoyable?

7. What experience, if any, have you had with non-profit organizations? What are your impressions of the non-profit sector?

Present Situation and Plans

8. What are your current employment and other obligations?

9. How do you envision your future in the next five to ten years?

RSVP Capacity Corps

10. Why are you interested in applying to be an RSVP Capacity Corps volunteer?

11. What special skills and qualities do you think that you would bring to a Capacity Corps assignment?
12. Capacity Corps volunteers will be like consultants helping Southern Maine Agency on Aging (and later other non-profits) increase their capacity to meet their missions. As a Capacity Corps volunteer you would be “working” for the non-profit and supervised by and accountable to staff of the non-profit. How would you feel about that?

13. What would you like to learn from serving as a Capacity Corps volunteer?

14. What kind of support would you want from the non-profit you were assisting as a Capacity Corps volunteer?

15. Let’s look at the Southern Maine Agency on Aging Capacity Corps Project Book together. These are projects that the Agency is hoping that Capacity Corps volunteers can help us with. I am going to review them with you. As we go along, tell me what projects or parts of projects interest you and for which you have appropriate background and skills.

16. How are you feeling about the Capacity Corps project at this point?

17. If you are selected to work with Southern Maine Agency on Aging as a Capacity Corps volunteer, when would you be available?

18. To sum up, why do you think that you would make a good Capacity Corps volunteer?

19. (Close and thank the interviewee.)
RSVP Capacity Corps

Recruitment Results
As of April 27, 2009

<table>
<thead>
<tr>
<th>Capacity Corps Results</th>
<th>Volunteers Recruited and Their Projects as of April 27, 2009</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Barbara Delaney</td>
<td>A volunteer performed market research to find out what the people who refer clients to SMAA’s Healthy Aging nutrition programs wanted to see us do differently.</td>
</tr>
<tr>
<td>2 Barbara Delaney</td>
<td>A volunteer is working with the Agency’s Truslow Adult Day Program to plan new services to better serve their clientele.</td>
</tr>
<tr>
<td>3 Chris Corbett</td>
<td>A volunteer with planning expertise in the corporate sector gathered information and worked with the Board to help develop the Agency’s new strategic plan.</td>
</tr>
<tr>
<td>4 Chris Corbett</td>
<td>A volunteer with planning expertise in the corporate sector is working with the Scarborough Land and Conservation Trust.</td>
</tr>
<tr>
<td>5 Gary Eckroth</td>
<td>A volunteer with marketing and sales expertise in the corporate sector gathered information and made recommendations to help develop a new marketing plan for our Nutrition Program.</td>
</tr>
<tr>
<td>6 George Flaherty</td>
<td>A volunteer is using his expertise in emergency management to help staff person develop an emergency plan for the Agency.</td>
</tr>
<tr>
<td>7 Jack Cole</td>
<td>A volunteer is working with the Agency’s Development Program to create a planned giving program to raise funds to support Agency services to seniors.</td>
</tr>
<tr>
<td>8 Marnie Ward</td>
<td>A volunteer with an accounting background developed a manual for the Finance Department to explain the Agency’s accounting and funding system to Board members and others.</td>
</tr>
<tr>
<td>9 Judy Noonan</td>
<td>A volunteer licensed social worker is working with the Information &amp; Advocacy Program to expand and improve phone assistance and face-to-face appointments with clients.</td>
</tr>
<tr>
<td>10 Sue Keeley</td>
<td>A volunteer with extensive involvement in local community services is working with the Information &amp; Advocacy Program to expand and improve phone assistance and face-to-face appointments with clients.</td>
</tr>
<tr>
<td>11 Cynthia Grovo</td>
<td>A volunteer with ministerial and paralegal experience was recruited to serve as an Agency Ambassador to represent SMAA as speakers at events in the communities we serve.</td>
</tr>
<tr>
<td>12 Sharron Cygan</td>
<td>A volunteer with a background in marketing and community relations is writing articles and interviewing subjects to increase the scope and number of features in the Agency’s newspaper, the Senior News.</td>
</tr>
<tr>
<td>13 Fred Kilfoil</td>
<td>A volunteer with a background in writing is crafting letters and other donor appeal materials for the Agency’s Development Department to augment fundraising efforts.</td>
</tr>
<tr>
<td>14 Barbara Asnes</td>
<td>A volunteer who is a former executive director of a non-profit has begun working with the Agency’s Healthy Aging Program to identify possible institutional partners and assisting to secure their participation.</td>
</tr>
<tr>
<td></td>
<td>Name</td>
</tr>
<tr>
<td>---</td>
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</tr>
<tr>
<td>15</td>
<td>Alice Mazurie</td>
</tr>
<tr>
<td>16</td>
<td>Diane Gotelli</td>
</tr>
<tr>
<td>17</td>
<td>Jon McNulty</td>
</tr>
<tr>
<td>18</td>
<td>Don McDowell</td>
</tr>
<tr>
<td>19</td>
<td>Susan Hirsch</td>
</tr>
</tbody>
</table>