1. **Describe the purpose of the grant project.**

   A staff member with a full-time role in a college was assigned to begin the development of an office of volunteer management by researching best practices in the field and assessing the university's current utilization and management of volunteers. In order to move the project along more quickly a student intern position was developed to assist the staff member. Upon receipt of the NEAT grant, we were able to post the position and hired two students who split the 20 hour per week assignment during the fall and spring semesters.

2. **Describe the scope of the Grant Project, the alumni relations-related research topic area explored and the constituency group that was involved.**

   Virginia Tech recently implemented a full advancement model bringing alumni relations, development, and communications under one umbrella. With our missions now aligned, we must better position ourselves to manage our volunteer resources in a more organized and intentional way. An advisory group with representatives from across advancement met throughout the year to discuss needs and issues associated with managing boards and councils at the highest levels of the institution. As needs were identified the position description for a director of volunteer management became clearer along with the resources needed to effectively implement broad volunteer management.

3. **Describe the process and timeline used to implement the Grant Project.**

   Two undergraduate student interns worked directly with the lead staff member in conducting the online research reviewing models and best practices of peer institutions, volunteer management software available for purchase, and online volunteer portals and outward facing volunteer websites of peer institutions. The interns also assisted in documentation and preparation of content for a presentation at an advancement retreat.

Timeline	Task
	Apply for and receive NEAT grant
3 months	
	Provide Matt with names of advancement colleagues for advisory committee
	Receive commitments from advisory committee members
	Finalize concepts/proposal for volunteer management plan
	Develop job description for Director of Volunteer Management
	Develop job description for NEAT student intern
6 months	

	Inventory all volunteer boards/councils within university currently documented in AIMS.
	Hire NEAT student interns
	Hold first and second meetings of advisory committee
	Check-in with NEAT program
	Review models and best practices of other institutions
	Review volunteer management software available for purchase
	Discuss possibilities and limitations of Blackbaud AIMS with Donor Relations/Research/Records
	Review online volunteer portals and outward facing volunteer websites of peer institutions
12 months	
	Share update on the plan at Unit Retreat

4. **Attach separately or include in the report your survey instrument, if applicable.**

   N/A

5. **Discuss your methodology for the process and/or survey.**

   N/A

6. **Provide a listing of the final Grant Project budget and how grant money was allocated.**
   Two undergraduate student interns
   20 hours per week total between the two students
   $10 per hour
   32 weeks (fall and spring semesters)
   Total cost = $6,400.
   Virginia Tech's Office of Alumni Relations will supplement the $1,400 not covered by the $5,000 grant award.

7. **Provide a brief summary of your findings.**

   Review of peer institutions' volunteer websites and online portals

   • Based on the overall goals of Virginia Tech's program, key elements were identified and summarized that could be modeled from the following institutions (notes available upon request):
     • Ohio State
     • Michigan State
     • Cornell
     • Duke
     • University of Virginia
     • Clemson University
     • MIT

- Texas A& M
- NC State
- University of Louisville
- Purdue

Exploration of Volunteer Management Software

- Example of available products:
  - GiveGab
    - Tracks interests, skills, and professional expertise
    - Allows for one annual nomination process
    - Nominations are directed to the area of interest
    - Alerts prospect managers

  - Other products reviewed that are either similar to Blackbaud or designed for networking or mentoring programs that are more than what we need to manage the process of gathering information from potential volunteers:
    - Graduway
    - PeopleGrove
    - Campus Tap
    - Hivebrite
    - 360Alumni
    - iModules
    - Finalsite
    - Wisr

  - Blackbaud/AIMS
    - The volunteer tab within Blackbaud will not meet our needs within the current volunteer management plan proposal.
    - Management tools and processes (by-laws, terms, staff contacts, etc.) for each board/council can be housed in AIMS as complete documents (PDFs).
    - In addition, BBIS should have the capability to serve as the online portal for volunteers to create accounts. Content gathered through BBIS would be batch loaded into AIMS; records could be marked with interests and skillsets.
    - Individual volunteer plans and board succession plans can be housed within the Documentations/Interactions area of AIMS, especially those individuals who are not a giving prospect.
    - Like a prospect plan, a volunteer management plan can be added to an individual's constituent record.

8. **Provide a brief summary of your conclusions.**

Position description defined for the Director of Volunteer Management

- Reports to the Senior Associate Vice President for Alumni Relations

- Responsible for strategically developing, designing, and implementing this comprehensive volunteer management plan
- Serve as a subject matter expert, providing resources for university-wide volunteer management colleagues and their volunteers in the areas of:
    - strategic planning
    - recruitment
    - membership processes
    - onboarding, training, and evaluation
    - in-person and virtual group interactions
    - pipeline management, off boarding, and succession planning
    - appreciation and recognition
    - data analysis and metrics
    - and communications

Create and maintain an organized model

- Senior Associate VP for Alumni Relations will review all current formal volunteer groups with a majority membership of alumni or industry
- Senior Associate VP for Alumni Relations must approve all new formal volunteer groups with a majority membership of alumni or industry
- Faculty enter engagement with alumni into faculty activity reports
- Units will report the following on their boards/councils by either completing a survey or entering the data directly into AIMS (depends on level of access). All Tier 1 boards should be reportable directly in AIMS by the unit advancement team.
    - Unit
    - Volunteer manager or coordinator
    - Name of board or council
    - Purpose/goals/objectives
    - Bylaws (if applicable)
    - Membership (name, major, class year, contact information)
    - List of officers
    - Schedule of activities and meetings

Manage progression through volunteer opportunities

- In collaboration with advancement colleagues, VPs, deans, directors, and department heads
- Develop and document in AIMS a long-term plan for each volunteer
- Develop and document a long-term plan for each board/council
- Assist units in identifying key volunteers to serve on Advancement committees within boards/councils
- Volunteers should not serve on more than one board at a time (some exceptions will apply)
- Engagement scores (based on the following preliminary parameters):
    - Updated contact information
    - Served on a board or committee
    - Attended a reunion/networking event (college or university level)
    - Made an annual gift

- Participated in an alumni travel tour
  *1 point for each instance in a category
- Future additional parameters to consider:
  - o Participated in a chapter activity
  - o Served as a mentor
  - o Helped a student find employment
  - o Spoke to a class or at an event
  - o Society membership
- Scores must be calculated outside of AIMS and could be stored under the Wealth and Ratings section of AIMS. An automatic refresh is not possible but an annual (or quarterly) score and a lifetime score could be calculated and posted.
- It may be possible to push from AIMS the two engagement scores for viewing in an individual's profile that they create in the BBIS.

Advancement Retreat PowerPoint is attached.

Complete Volunteer Management Proposal is attached.

Position Description is attached.

9. **Provide a brief summary of the impacts this project will have on the future of your alumni association/office programming.**

This project laid the groundwork for understanding the importance of an individual and office in leading volunteer management at the institution. Alumni relations can be overshadowed by the need to meet fundraising goals. By sharing this volunteer management proposal with the three arms of advancement, it displayed the impact volunteers and the proper engagement of them can have on all of our goals. It also showcased the importance of advancement teams working together to identify, utilize, and steward volunteers. There was much excitement generated across advancement of having these new resources. Next steps are to move forward with filling the Director's position so that the background work done during the last year can be translated to developing the website, working with the colleges and units to develop their volunteer plans, and data can be expanded within Blackbaud.

One unexpected impact was the impression made on the two interns of the value of volunteers to an institution of higher education. It opened their eyes to a part of the institution that students do not often see until graduation or as alumni. One intern graduated and is working in the area of student affairs but is also interested in alumni relations.