



Volunteer Wisconsin – Steering Committee Meeting – Strategic Refresh

October 3, 2014 – Chula Vista Resort, Wisconsin Dells

Meeting Topics

- I. Introduction of New Steering Committee Member
- II. Review History of Volunteer Wisconsin
- III. VGF Final Progress
- IV. Review of July 2014 Roundtable Discussion
- V. Discussion of Marshfield Clinic Work Plan
- VI. Review Goals and Beneficiaries of Volunteer WI
- VII. Refreshing Goals and Work Plan Tasks
- VIII. Needs for Volunteer WI Website
- IX. Steering Committee Refresh
- X. Take-Away Tasks
- XI. Other Notes

I. Introduction of Shelly Kaiser, Health Educator, Marshfield Clinic

Brian Blahnik of Marshfield Clinic introduced Shelly as the new Health Educator who will be managing the Volunteer Wisconsin AmeriCorps program. Shelly was formerly the Volunteer Connection Director with the United Way of Marathon County. Her main duties with the AmeriCorps program will be to work with members, host site supervisors, and host sites and take the lead with Volunteer Wisconsin.

II. History of Volunteer WI

Bonnie Andrews shared a brief overview of the history of Volunteer Wisconsin as a refresher, which included:

- Original intent was to increase effective volunteerism in the state—not just more volunteers—and to help nonprofit organizations work with volunteers more effectively.
- Volunteer Centers were interested in looking at areas in the state not served by VC.
- There was a need for better knowledge about volunteerism in WI; how to promote volunteerism better; one-stop shop to find opportunities and connect volunteers with service.
- Partnership with Emergency Management—came about because of funding through Homeland Security. Greg brought group together to create Volunteer Connections (WeVolunteer) to register volunteers ahead of disasters and training throughout state to respond to disasters.

III. VGF Final Progress

The Volunteer Generation Fund (VGF) grant focused on Fostering Partnerships (212 partner agencies), Connecting Volunteers (970 referrals total; 750 volunteers registered, but estimated 800-1,000 youth that could not be registered), and Supporting Volunteer Leader Capacity (236 leaders). Marshfield also focused heavily on Promoting Volunteerism. All performance measure targets were exceeded. The VGF grant closed August 31, 2014.

III. Review of Volunteer WI Roundtable

We reviewed the report that Cade Spaulding, PhD, of UW-Stevens Point created, summarizing the discussion between AmeriCorps Program Directors and Volunteer Center Directors on July 28, 2014. The purpose of the roundtable was to bring these viewpoints to the strategic refresh. Findings included:

- High level of collaboration between AC programs and VC Directors.
- Themes identified were: Collaboration, Structure/Organization, Diverse Types of Volunteers & Change in Volunteer Demographics, and Measurement of Outputs.

The findings fit into the strategic refresh in the following ways:

- Impact on the training done with AC members – alert to changes in volunteer environment
- Need to refer back to discussion topics to ensure we are meeting their needs
- Gives us thoughts to diversify steering committee
- Use the VCAW notes to integrate ideas, too
- Gave us an idea of shared interests/concerns

Still needs to be worked on: What is the shared identity? How do these different groups connect?

IV. Marshfield Clinic Work Plan Objectives

The Marshfield Clinic Work Plan was created prior to first steering committee meeting without Volunteer WI Strategic Plan in hand. Marshfield Clinic has a long history of creating coalitions to meet strategic goals. Their Work Plan included 5 objectives, which mostly fit with the 2012-14 Volunteer WI Strategic Plan, with some exceptions:

- Change Objective 4 – find support for Vol WI
- Also need to focus on infrastructure of Vol WI
- Connecting – Objective 3 (website is a part of it) – serving as a catalyst for connection (providing the tools, technology, resources, training, etc. to make connections)

Committee members present at the October 3rd meeting will revise the Work Plan to complement the 2015-17 Volunteer WI Strategic Plan (see below: **X. Take-away Tasks**).

V. Reviewing Goals, Mission, and Beneficiaries of Volunteer WI

Values & Goals of Volunteer WI: Are they still relevant?

Mission updated to: **To promote, support, and increase effective volunteerism for positive community impact.**

Discussion of our Customers/Audience: *Who is receiving direct service from Volunteer Wisconsin? What can we do to help solve their problems?*

We found that the #1 Customers/Beneficiaries for Volunteer Wisconsin are **organizations engaging volunteers** (e.g. nonprofits, faith-based, government, schools, community-based organizations, neighborhood associations) Our secondary Customers/Beneficiaries are **volunteers**, but ultimately we want local organizations to manage the volunteers (includes individual volunteers, corporate volunteers, skill-based).

What can Volunteer WI do that local organizations can't?

1. Rural areas—connect volunteer with opportunity in resource-scarce communities
2. Businesses—look for opportunities to connect with local nonprofits for service project (part of employee requirement)—volunteer WI could provide help/training on how to do that
3. Volunteer WI would have the resources available to help NPOs and others, as well as training, consulting, needs assessment, etc.
4. Have statewide website—but needs to be promoted and managed to be useful for customers.

Problem: Different organizations are doing this already. What can we do that is unique?

Problem: How to get businesses involved? Register as a volunteer?

VI. Refreshing Goals and Work Plan Tasks

The group then took each goal of the 2012-14 Strategic Plan to determine if the goal was still relevant, fit in with the mission, and the corresponding tasks for each goal. These updates are below and on the 2015-17 Volunteer WI Strategic Plan (DRAFT).

Strategic Goals (2015-2017) & Work Plan

Sustainability

“Development of infrastructure and revenue to support Volunteer Wisconsin”

1. Develop diversified funding plan for long-term sustainability
 - a. Determine what is being funded/what support is needed (staffing, media, website, training)
 - b. Identified partners (below) as potential funding source
2. Determine governance structure of Volunteer WI and diversify its membership
 - a. Identify and recruit Steering Committee members
 - b. Review and revise SC roles/responsibilities
 - c. Organizational structure and staffing
 - d. Guiding Principles and By-Laws
 - e. Decision-Making Process (by consensus?)
3. Establish an annual communication plan to inform the stakeholders on Volunteer WI strategies, activities, and outcomes

Support Volunteer Management Capacity

“Assess and build capacity of organizations to engage volunteers”

1. Explore the use of Organizational Capacity Assessment Tool to gather input on the assets and needs of organizations related to volunteerism
 - a. Determine how to utilize statewide
[Other considerations: Bonnie may be able to create a score sheet for organizations to identify priorities with suggestions for improvement. If we analyze results for them—fee for service.]
 - b. Use results from assessment to determine Volunteer WI training agenda
2. Review definitions for volunteer data and develop annual process for assessing volunteering in Wisconsin
 - a. Survey agencies that utilize Volunteer WI and Volunteer Centers (about volunteers)
3. Provide access to volunteer management training and resources
 - a. Post on website and invite (webinars, face-to-face trainings)
 - b. Track participation and measure impact of volunteer engagement training
4. Revise and expand the functionality of the Volunteer WI website as a repository for learning and sharing

Foster Partnerships [this goal should be shaped with needs/interests from potential partners]

“Develop and leverage partnerships in support of volunteerism”

1. Identification and ongoing development of collaborative relationships to support and expand volunteerism
 - a. Survey field – identify need partnership will address (community needs)
 - b. Determine need of Emergency Management/how to partner in disasters
2. Develop or partner on volunteer and volunteer manager recognition
3. Convene organizations with an interest in volunteerism

Connect Volunteers

“Maintain and continuously improve strategies to support the recruitment and engagement of volunteers statewide.”

1. Support and expand the usage and functionality of the Volunteer WI website as a tool to connect volunteers

- a. Determine how to connect organizations with Emergency Management (electronically) & connect volunteers in time of disaster (organizations can be notated with medallion)
 - i. Maintain connection with disaster volunteers in interim
- 2. Develop and implement a social media plan, expanding on our current use of Facebook and Twitter
- 3. Develop a reporting system to track volunteer encounters
- 4. Collaborate with Volunteer Centers and VC Association
 - a. Work with Volunteer Connection to collect opportunities

Promote Volunteerism

“Promote volunteerism in Wisconsin through a comprehensive marketing plan”

- 1. Develop common message of volunteerism
 - a. Collect and develop stories of volunteerism
 - b. Develop Volunteer Wisconsin talking points
- 2. Identify Champion of Service
- 3. Create and implement communications plan

VIII. Needs for Volunteer WI Website

During the discussion, the following ideas for updating www.volunteerwisconsin.org were suggested:

- 1. Upcoming Training calendar
- 2. Benefits to registering
- 3. Resources
- 4. Register Organization / sign-up for updates on each page

IX. Steering Committee Refresh

Steering Committee is very AmeriCorps-heavy at the moment. Committee identified the need to diversify the composition to reach sectors not currently represented. These include:

- 1. Senior Connection – AARP, RSVP
- 2. Corporate – Bank, others?
- 3. Professional Association – WI Assoc. of Non-Profits, Mayor’s Association
- 4. Faith Groups – WI Council of Churches
- 5. UW-Extension
- 6. Governor’s Office
- 7. Large Nonprofit – Habitat, United Way
- 8. Continuing Education – UW-EC
- 9. WI Chamber of Commerce Executives
- 10. WI DPI
- 11. WI Job Centers
- 12. Veteran Groups
- 13. Youth Groups - Scouting Orgs, Sporting Groups
- 14. Volunteer Center Directors

Other Steer Committee Considerations

Possible Committees - Training/Capacity Assessment; Marketing/Promotion/Technology; Partnerships/Sustainability

Meetings – 3x per year; 10 am – 3 or 4 pm (eliminate overnight stays); Locations TBD based on locations of committee members

X. Take-Away Tasks

1. Update Strategic Plan – Jessica – send out to committee for their additions
2. Send minutes from meeting to full committee, heads-up that Shelly will be contacting them for continued interest and we will send draft work plan and strategic plan for their input – Jessica
3. Reach out to Committee to gauge continued interest – Shelly
4. Committee to fill in tasks/work plan based on their association with Vol WI – All (Marshfield will do first draft and send to rest of committee)
5. Get input from Vol WI AC host sites on needs Vol WI could address at trainings – Bonnie & Brian
6. Get input from VCAW on needs Vol WI could address – Bonnie

XI. Other Notes

- Team Rubicon – deploys veterans to disaster sites. Regional offices. Helps vets reintegrate.
- Need to connect with VFWs and American Legions to help organize vets to volunteer.
- Should we require our AC programs to reach out to their local Volunteer Centers and emergency management/disaster preparedness organizations?
- Need to have clear roles and responsibilities for Volunteer WI. (Especially Marshfield Clinic—how do they split time between Vol WI AmeriCorps and Initiative?) Ultimately, Vol WI needs to have enough infrastructure to continue without AmeriCorps funding (have enough partners to sustain).
- Should obtain list of NPOs/orgs in WI and promote Volunteer WI to them directly.
- Priority to connect Volunteer WI with CNCS Performance Measures—have entities start to use same language, same tools to measure, etc.
 - o Concern from WEM—recruiting volunteers isn't their point. They need to have partnerships with organizations with their volunteers that are already engaged to respond to disaster.
 - o Other concern—PMs can become a barrier if they don't serve the program the best way.
 - o CNCS is only going to get more performance measure, outcome, evidence-based, not less