

ESC-US Conference Call

August 4, 2016

ESC Organization	#1. Has the profile of a typical volunteer consultant changed in the last 5 years? In what way? Has your volunteer base grown, shrunk or remained the same during the last 5 years?	#2. Do you actively recruit volunteers and if so, what are some of the methods you use?	#3. Do you target a particular demographic? Do you target particular skills?	#4. During your on boarding process, how do you handle volunteer expectations of serving on projects?	#5. How has your volunteer retention been? Other than moving or health issues, why do volunteers leave the organization?
South Florida	South Florida just reactivated in last 1.5 years so don't have that perspective.	VolunteerMatch, and networking informally in community	Retirees and soon-to-be retirees.	We ask applicants for their skillsets (ie expert or generalist). Volunteer chair assesses applicants. If no external projects available or fitting their skills, try to use on internal project.	Retention has not been a problem as long as we keep them engaged.
Colorado	About 25 volunteers on roster. 50-60 projects this year. About 10 left when new leadership and changes but about 5 new consultants since then.	We are predominantly recruiting through word of mouth. Hasn't been a heavy focus.	Targeting working professionals , currently 7% of pool. Want to get to 50/50. They work with professional groups, leadership groups.		All consultants are on projects, they submit proposals to lead workshops, they help lead monthly meetings. We provide opportunities for them to network and have happy hours. We've kept them very engaged. We lost about 10% of the

					consultant pool when we had a lot of internal transition but we've also brought on quite a few of new folks.
Cincinnati	100 volunteers. 40% are fully retired, rest are working full or part-time.	Up until recently, VolunteerMatch. To limit the lag between accepting volunteers and placing on projects, we are not actively seeking volunteers.	They don't at the moment but they may try to, especially to increase diversity. May look at millennial generation. Looking at partnerships w/ local corps (i.e. leave of absence programs.	Two staff interview each applicant. We review the different stages of client process, matching, length of project, and the average # of hours per year. Everyone is given project in the first 90 days whether w/ a client or internal.	Retirees leaving to check off items on their bucket lists.  We've gotten better w/ retention due to better screening. To keep engaged even if not on projects we run activities like water coolers and quarterly meetings.
Southern California	About 100 consultants. Last few years, younger executives who are fully working, have their own companies/practices. Rolled out emeritus process to shift inactive consultants or those we can't match to emeritus status.	Mostly word of mouth and referrals, some from VolunteerMatch	Targeting for racial/ethnic diversity. Looking for those w/ bilingual Spanish/English skills. Also looking at geographic location ie. Orange County.	Vetting process starting w/ Info Workshop where they demonstrate coaching. Nearly 40 hours of training before being matched for project. Emphasizing expectations all along the way, including of 2-3 year minimum commitment.	Good retention. Losing some great volunteers who are returning to work force or got job offers they couldn't refuse.
Houston	Shifting to younger, currently working, others in career transition. At one point, 75 consultants, pared down to 50 long	Not actively recruiting because not many projects. Sources have been AFP, Volunteer Houston, VolunteerMatch, referrals.	Has been mostly "Pale / Male / Stale." Racial diversity is sought. Emphasizing now	We have a retired HR professional that talks to each applicant and discusses expectations, and does onboarding training; they have	Retention is pretty good. Biggest driver is the lack of work.

	standing consultants who are carrying the load		accounting professionals, strategic planning backgrounds. Spanish speakers wanted.	monthly consultant roundtables.	
Seattle	16% retirees; growth and their project focus have allowed us to engage a more diverse range of experts; targeting more technical projects results in less focus on executives. 57% female, 18% persons of color	Previously word of mouth. Now a new screening process, more stringent on skills that are needed.	Continually refining what they need, what their clients need. 4-6 months is average length of project. 10-12 hours a month is what's expected when on a project.	Recognize we need to do more onboarding training although application process is strong. Not much formal training yet. Corporate volunteers may not have the nonprofit competency. So may be developing a training this year.	We tend to keep people on the roster for the prospect of the right project at some point. Would like to engage each volunteer once a year but doesn't always happen, use about half of them a year.
Oklahoma	Struggled w/ balancing projects & consultants. We go out and get a consultant as soon as we know we have a potential project need if we don't have someone that's a good match already. Then often can put them on a project in 30 days.	Using Downtown Rotary Club for most of recruits. It's one of the largest chapters in the world w/ 600 members and is very diverse so works well for them.	A lot of their experienced consultants are serving on their board. Having a healthy mix of consultants on the board is important. Do lots of turnaround and scale-up work so business background is key skillset – available through Rotary.		We haven't experienced any of these new consultants disappearing. Retention is good. They are averaging about two projects a year.
Pittsburgh	About 40 consultants	Use website to recruit	Difficulty onboarding a lot of consultants	One hour info session to vet. If they are interested, then four-	Retention is good. We don't lose consultants because we aren't using

			simultaneously. Staff is busy and hard to get eight volunteers in the room at the same time.	hour Orientation. Yvonne (ED) has individual conversations with each.	them. There's always some project available, even an internal ones or in other segment of the overall Bayer Center mix (ESC is just one component)
Boston	Did major recruitment effort (goal was 50/year for a few years) thanks to Blue Cross/Blue Shield. Now 150 consultants in pool. Challenge was not enough projects for all of them.	Not all fully retired now (about 70% are), but used to be. Don't actively recruit except for the recruitment effort that was sponsored by Blue Cross/Blue Shield. Word of mouth and using her personal network to recruit consultants who fit their target demographic.	About 50% women. Not as diverse as they would like to be. 5 active consultants who are African American though Boston is 1/3 is African American. Maybe 1 or 2 Hispanics.	We interview applicants, skill matching, forms, four days of training that are offered in the spring and the fall. Occasionally we'll bring people on mid-cycle because a particular need is there.	Aiming for placing new consultants on projects within first 90 days, if they can't get them on by 180 days, tend to lose them. Looking to reinstate monthly consultant activities, with attendance of about 30 at each one so far. Hoping volunteers can lead them but so far staff are doing so.
New York	Mostly retirees. 144 consultants, was at 300 but winnowed them down. Mostly use same 50 or so consultants.	Not actively recruiting as they're rethinking direction.	Mostly male. Hardly any persons of color.		
Triangle	Been growing for past 5 years. Have about 65 volunteers.	Actively recruiting currently. Volunteer Match. AARP (hasn't been successful). LinkedIn (so far not successful).	People who can do complex projects which are longer. Lots of client requests for strat planning. Not very diverse right now.	Two-hour Orientation, generally timed for when they have more than 2 new consultants.  Quarterly Program often with 15 attendees (holiday party, presentations, roundtables, speakers).	Retention is strong.

