

# Build the Volunteer, Build the Community:

## An Analysis of Sustainable Waterloo Region's Strategic Volunteer Program

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# Key Takeaways

For every 1 dollar invested in and by volunteers...



By 2017, Sustainable Waterloo Region had partnerships with **93** organizations across the region

By 2017, **85%** of the Sustainable Waterloo Region team was composed of volunteers

2 dollars of value is generated!



## Sustainable Waterloo Region

- Capacity-building
- Community engagement
- Access to networks and talent pools

## Local Educational Institutions

- Unique opportunities to develop student skills
- Improved educational institute-community bonds

## Local Businesses

- Access to a higher productivity, experienced workforce

## Local Government

- Improved institutional capacity
- Provision of a high-skilled and work-ready pool of labour for other local non-profits

## Volunteers

- Professional experience
- Skill development
- Professional networking opportunities

# Executive Summary

Volunteerism has always been critical to the non-profit sector. Yet as nonprofits grow and professionalize it is often the case that the role volunteers play is dramatically reduced or abandoned altogether to reduce organizational risk and improve program consistency. Alongside this there are many people on our workforce looking for the valuable work experience, skill development, and access to professional networks that volunteering can provide.

Sustainable Waterloo Region’s strategic volunteering program has a strong track record of creating win-win relationships in which volunteers provide valuable service in advancing their environmental mission while also developing valuable skills. Because they provide workforce development benefits to volunteers but are not a focused workforce development organization, Sustainable Waterloo Region’s strategic volunteer program can provide a model that other nonprofits can use to increase access to new resources while making an additional positive community impact.

Sustainable Waterloo Region closely follows Volunteer Canada’s Ten Best Practices for Volunteer Management, and there are five core elements to how they operationalize their volunteer model:

1. Staff Engagement with Volunteers
2. Build High Impact Positions
3. Have Clear Benefits for Volunteers
4. Develop Clear Role Descriptions
5. Recognize Volunteer Contributions

In following this model there are substantial benefits to volunteers depending on where they are in their careers. For *student volunteers and recent graduates* these are professional experience, skill development, professional networking opportunities. For *mid-career and professional volunteers* These are professional experience, skill development, professional networking opportunities, and opportunities to change their career paths. Finally, for volunteers in managerial positions (called *Functional Area Managers* at Sustainable Waterloo Region) these are professional networking opportunities and opportunities to change career paths.

The benefits for Sustainable Waterloo Region are also substantial. In 2017 for every \$1.00 spent on staff time supporting volunteers \$3.75 of value in volunteer labour was contributed. Moreover, these provide critical strategic benefits that allows them to collaborate in more complex projects, provide access to high-quality talent, develops internal talent, elevates their role as a local leader amongst non-profit organizations, and it generates new sources of funding.

By its 10<sup>th</sup> anniversary in July 2018, Sustainable Waterloo Region had grown from a research project into an organization that assisted in the reduction of 41,348 tons of greenhouse gas (GHG) emissions in the Region; it also engaged more than 93 program members and supported the addition of 559 electric vehicles in Waterloo Region. We conducted a Social Return On Investment analysis of their strategic volunteer program and found that in addition to this mission-specific impact, a total of \$2 of workforce development value was generated for every \$1 in staff or volunteer labour devoted to the program. This value is shared between volunteers (26%), Sustainable Waterloo Region itself (25%), local governments (35%), local companies (10%), and local educational institutions (5%).

Sustainable Waterloo Region's program has evolved over time from start-up, through solidifying the program and now into scaling its impact. Organizations seeking to adapt this programming to their context should build strong foundation for its success in phases.

When *starting* a strategic volunteer program:

- Clearly define the organization's mission
- Outline your core programs
- Identify the skills and number of people needed to execute core programs
- Outline the mission-critical functions for your core staff
- Create well-defined high impact role descriptions for both volunteers and staff
- Explore possible talent pools, externally for small organizations and both internally and externally for large ones
- Establish relationships with key external sources of talent
- Create a thorough volunteer recruitment, application, and interview process
- Have staff engage with volunteers to provide support and recognize contributions

When *solidifying* a strategic volunteer program:

- Devote resources to maintaining organizational memory through staffing
- Build programming to reduce risk to projects resulting from volunteer attrition
- Develop volunteer advancement ladders to promote skill-development
- Maintain a positive mission-focused culture to retain volunteer talent

When *scaling* a strategic volunteer program:

- Embrace workforce performance measurement and data collection
- Incorporate volunteer workforce data into current and future strategic decisions, shifting the balance of staff-volunteer contributions as required
- Communicate the value of volunteer workforce development to external stakeholders

In developing a strategic volunteer program it is important for a nonprofit's leadership to keep its strategic implications central. Three elements are key to keeping strategy in focus.

- First, focus on *volunteer development*. In particular build volunteer development ladders and clarify the benefits you are offering volunteers.
- Second, *integrate more data as the program expands*. Capture the contributions your volunteers make quantitatively and collect their stories, using these to understand emerging trends and to identify new opportunities.
- Third, focus on your *core social impact*. Two questions can help guide this: Is volunteer development core to your organization's mission? Is volunteer development a strategically important way of advancing your organization's mission?

## Acknowledgements

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# Introduction

A lack of effective workforce development is a major challenge to the Canadian economy. Despite moderate increases in investment in employee learning since 2012, employer investment in workforce training is substantially less per employee today than it was in 1993 (Cotsman and Hall, 2017). This lack of investment in people hurts Canadian innovation and workforce productivity. Left unchecked, this gap leads to stagnating incomes for families and communities that get left behind in our competitive global economy.

For individual workers it makes it harder for them to get on or move up their career ladder. Canada's current labour market is highly competitive. Young workers and recent graduates today face high barriers to entering the professions they were trained for despite being the most educated generation in Canadian history. Companies often ask for previous work experience yet entry-level opportunities in many industries are tough to come by. Those in early career positions are often looking to move up in their organizations but have a hard time finding ways to exercise their skills and responsibilities in ways that will further their growth.

Alongside the challenges faced by new entrants to the workforce, many nonprofit organizations lack the resources to hire paid staff to fulfill their mandates. Because of this many nonprofits rely extensively on volunteers. However, managing volunteers is time intensive for the staff that nonprofits do have and designing positions that allow volunteers to bring more than minimal skills to the table is difficult. Moreover, low-skilled volunteer positions are often a missed opportunity for volunteers to develop the skills and experiences that can directly benefit them.

A deep integration of a volunteer-driven model with a nonprofit's strategy is not to be taken lightly. In this report we refer frequently to a 'strategic volunteer program' because the necessary elements of the volunteer approach outlined here must be integrated into the entire strategic decision-making process to reap its full rewards. What is outlined here cannot simply rest in the hands of a volunteer coordinator – it has to be owned by the entirety of an organization's senior leadership.

## Why Sustainable Waterloo Region's strategic volunteer program

In their 10 years in operation, Sustainable Waterloo Region has a strong track record of providing volunteer experiences that directly benefit their volunteers' career development.

While many of the lessons that they have learned are specific to both the sustainability space and their local Waterloo Regional community, much of that they have created through their volunteer programming could be replicated by nonprofits elsewhere.

Part of this comes from the operationalization of many volunteer best practices. Volunteer Canada specifies ten best practices for volunteer management, most of which are applied in the recruitment process. Sustainable Waterloo Regional has adopted all of these practices in novel ways while also adding their own particular nuances.

### **Volunteer Canada's Ten Best Practices for Volunteer Management (2005)**

1. Valuing the role of volunteers
2. Defining rules and expectations
3. Developing volunteer management skills
4. Reducing client and group risk
5. Creating clear assignments
6. Reaching beyond the circle
7. Orienting and training volunteers
8. Providing supervision
9. Making volunteers feel they belong
10. Recognizing volunteer contributions

This approach couples well with what we know works in workforce development. While experiential learning experiences, including co-op and volunteering, are well accepted by practitioners, educators and governments because they support skill development (Premier's Highly Skilled Workforce Expert Panel 2016), their relationship with volunteering is murky. If this relationship can be clarified and the benefits amplified then impactful volunteering could be dramatic.

We believe that many volunteer experiences are missed opportunities for both volunteers and nonprofits. Creating volunteer experiences that advance their careers while also building the capacity to advance an organization's mission has been a challenge for many nonprofits. This report will share the management practices that have allowed Sustainable Waterloo Region to create mutually beneficial relationships between themselves and their volunteers.



## About Sustainable Waterloo Region

Since its founding in 2008 by recent Wilfrid Laurier University undergraduates Mike Morrice (founding Executive Director) and Chris DePaul with the guidance of Dr. Barry Colbert, Sustainable Waterloo Region has developed deep roots within their community. They have worked with private companies, the public sector, educational institutions, and other nonprofits to advance their mission of enabling local organizations to convert their sustainability interest into action.

### Sustainable Waterloo Region's programs

**Regional Sustainability Initiative:** This encourages program members to set carbon, waste, and/or water reduction targets and to take sustainable operational approaches. Through one-on-one support, tools, training, and networking, the Regional Sustainability Initiative ensures the foundation for an action plan. Since 2016 this has been the successor program to the Regional Carbon Initiative launched in 2009

**TravelWise:** This program offers sustainable commuting options, including discounted Grand River Transit passes, emergency rides, and an online carpool tool for employees in Waterloo Region to reduce the number of single-occupancy vehicles on the road.

**ClimateActionWR:** This program establishes a cross-sector dialogue and facilitates collaborative opportunities to measure progress toward the community's GHG emissions reduction target.

**ChargeWR:** This program works with organizations in the region to promote and implement activities that increase the number of electric vehicles and charging stations.

**evolvGREEN:** In collaboration with the City of Waterloo, the University of Waterloo, Wilfrid Laurier University, and the Accelerator Center (the latter is dedicated to supporting organizations that range from startups at the idea stage to high-growth enterprises through processes including one-on-one mentorship and more), this clean economy incubator hub plans to foster the development of the local clean economy and build a culture of sustainability in evolv1, the first net positive, multi-tenant, sustainable building in Canada.

By its 10<sup>th</sup> anniversary in July 2018, Sustainable Waterloo Region had grown from a research project into an organization that assisted in the reduction of 41,348 tons of greenhouse gas (GHG) emissions in the Region; it also engaged more than 93 program members and supported the addition of 559 electric vehicles in Waterloo Region. Moreover, Sustainable Waterloo Region spun out Green Economy Canada to support a network of like-minded organizations across Canada.

During this time the deep integration of volunteers into the organization's operations has greatly increased its capacity to perform valuable work. Volunteers are embedded in a wide range of functional areas in medium- and high-level positions, including human resources,

marketing, finance, business development, information technology, and web design. These volunteers have formal deliverables, meetings, plans, and area objectives. The organization has evolved to incorporate a combination of paid staff and volunteers in its work in a way that requires both groups to carry a high level of responsibility, produce quality work, and demonstrate commitment and self-motivation. This occurs to such an extent that separating the roles played by volunteers from those played by paid staff can be difficult.

## Background to this report

This report analyzes the impact of Sustainable Waterloo Region's volunteer model primarily using a workforce development lens. While the primary mission of the organization is to advance sustainability, this report sets aside the direct impact of their volunteers on sustainability except where it is necessary to provide additional context for their volunteer model. This is so that this report can focus on the components of their model which are most transferrable outside both the sustainability space and Waterloo Region.

Sustainable Waterloo Region has evolved over time. It shifted from being completely operated by volunteers into one with a mixture of volunteers and staff that not only helps its local community to adopt sustainable practices, but has spun off projects to help others replicate its successes beyond Waterloo Region. In order to build this organization from the ground up, and given limited funding for staff, the founders initially recruited volunteers; these people shared their interest in sustainability and had a mixture of skills and a skill-development mindset that enabled them to make substantial contributions. Other nonprofits can learn from their experiences as a small start-up organization through their growth into a medium-sized organization increasing the variety of its programming and now as Sustainable Waterloo Region transitions to being a large, stable nonprofit organization. At each stage of this evolution elements of its volunteer program were developed or changed and this report is designed to be useful to nonprofits of various sizes.

This study is the result of an eight-month collaboration between the University of Waterloo and Sustainable Waterloo Region to analyze the organization's volunteer model with an emphasis on workforce development as this model has been identified to have positive impacts on its volunteers' professional lives while being influential in building capacity for the organization over its development. This work was generously supported by the Ontario Ministry of Training, Colleges and Universities (Ontario Ministry of Advanced Education and Skills Development at the time the report was commissioned). The views expressed in this document are those of the authors and do not represent the Ontario Ministry of Training, Colleges and Universities.

## Methods

To learn about the workforce development value created by Sustainable Waterloo Region we conducted a Social Return On Investment (SROI) analysis focused on their 2017 volunteers. To support we used surveys and interviews to identify the impacts that volunteering with this organization has on volunteers, Sustainable Waterloo Region, local employers, and the extended ripple effect on the regional economy. SROI analyses apply financial values to these impacts in order to understand the program's economic impact.

### **Steps in conducting a Social Return On Investment analysis (SROI Handbook, 2012)**

1. Establishing scope and identifying stakeholders
2. Mapping outcomes
3. Evidencing outcomes and giving them a value
4. Establishing impact
5. Calculating the SROI
6. Reporting, using, and embedding

### **The 7 Social Return On Investment principles (SROI Handbook, 2012)**

1. Involve stakeholders: Inform what gets measured and how this is measured and valued by involving stakeholders
2. Understand what changes: Articulate how change is created and evaluate this through evidence gathered, recognizing positive and negative changes as well as those that are intended and unintended
3. Value the things that matter: Use financial proxies in order that the value of the outcomes can be recognized. Many outcomes are not traded in markets and as a result their value is not recognized
4. Only include what is material: Determine what information and evidence must be included in the accounts to give a true and fair picture, such that stakeholders can draw reasonable conclusions about impact
5. Do not over-claim: Only claim the value that organizations are responsible for creating
6. Be transparent: Demonstrate the basis on which the analysis may be considered accurate and honest, and show that it will be reported to and discussed with stakeholders
7. Verify the result: Ensure appropriate independent assurance

The data we collected from Sustainable Waterloo Region's stakeholders was used to identify impacts and to validate the assumptions used in producing our SROI analysis. To obtain financial proxies we relied on a mixture of academic research and case studies. These sources of these financial proxies are included in the SROI spreadsheet and were used to estimate the impact of this strategic volunteer program.

## Data collection

- **Online Survey:**
  - 22 volunteers
  - One company that hired volunteer alumni
  - Two partner universities
  - Six paid staff
- **Key informant interviews:**
  - Sustainable Waterloo Region's Executive Director
  - One Sustainable Waterloo region Co-Founder
  - Three members of Sustainable Waterloo Region's Board of Directors
  - Two Sustainable Waterloo Region Volunteer Area Managers
  - One representative from the City of Waterloo
  - One representative from the City of Kitchener
  - One member of an educational institution
- **Validation interviews:**
  - 16 volunteers
  - Three Sustainable Waterloo Region paid staff

# The Sustainable Waterloo Region strategic volunteer program

Sustainable Waterloo Region is a nonprofit organization dedicated to enabling organizations to convert their sustainability interest into action. The original idea came from research about the potential of creating a nonprofit dedicated to helping organizations in Waterloo Region achieve carbon reductions through collaboration and education. Sustainable Waterloo Region emerged from research projects completed by Chris DePaul and Mike Morrice, guided by Dr. Barry Colbert at Wilfrid Laurier University's School of Business and Economics. With Mike Morrice as their founding Executive Director, their vision was one of turning Waterloo Region into an environmentally and economically resilient community that prioritizes the wellbeing of current and future generations, a goal which continued under the leadership of Tova Davidson as Executive Director starting in 2014.

## Development

At its founding Sustainable Waterloo Region did not have the financial resources to hire staff and instead had to rely on a large number of young volunteers to build their sustainability movement. This volunteer base was at the core of the organization from the beginning and the way it was institutionalized enabled an innovative organizational culture to grow around the volunteers.

Quickly the highly-skilled work undertaken by their volunteers drew attention. As Sustainable Waterloo Region grew it professionalized in part by bringing in more paid staff to reduce the risk that comes with depending entirely on volunteers. However, even with the growth in paid staff volunteers continue to play key roles in providing their programming. Indeed, it is the cohesion between volunteers and staff that enables volunteers to efficiently support both programs and the organization's operations in different functional areas (see Graph 1).

Fig 1. Sustainable Waterloo Region's organizational structure, 2018



As different needs arise or volunteers leave, Sustainable Waterloo Region performs assessments and adjustments to respond appropriately; This capacity to adapt causes slight variations in the organization structure in specific points of time but also maintains positions where volunteers are truthfully required and can make substantial contributions.

## Evolution

We see three distinct phases in Sustainable Waterloo Region’s development: **Start-up**, **Small** organization, and **Medium** organization phases. Currently Sustainable Waterloo Region is in the process of transitioning into a fourth **Large** organization phase.

### Start-up: 2008 to 2011

During this period, the organization went from being entirely volunteer managed to hiring staff. Most of the resources came from volunteers via in-kind contributions, but they started very early to work across sectors to raise funds. By 2011, while having a significant reduction on the number of volunteers engaged, the organization was able to hire nearly double the staff, which impacted in their capacity for the following years to deliver programs and increase the community engagement. During this first stage, volunteers concentrated on supporting the organization’s operations as well as their only program, the Regional Carbon Initiative (now the Regional Sustainability Initiative).

**Fig 2. Information flow stage 1: Every area reported directly to the Executive Director with some weak cross-unit connections around team specific goals**



## Small organization: 2011 to 2014

By 2011, Sustainable Waterloo Region was a well-established organization. It had developed bonds with the community that transformed into partnerships and a higher number of volunteers. With broader recognition and contributions, the organization was able to expand its scope and start other projects, including the Climate Collaborative (now ClimateActionWR ). These required further staff and additional volunteers to support functional areas and the Regional Carbon Initiative.

As part of this growth, the range of programs offered by Sustainable Waterloo Region expanded. As the programming grew these programs and areas tended to work independently of each other with the Executive Director serving as the common connection point between them.

Overall we can view the 2008 to 2014 as the *Starting* period of the Sustainable Waterloo Region strategic volunteer program.

**Fig 3. Information flow stage 2: As more programs started, each area continued reporting to the Executive Director but their relationship with each other's work and how those were being conducted was limited**





## Medium organization: 2014 to 2018

Along the growth in programming there was a growth in the number of paid staff hired to manage programs. While a large number of volunteers still formed the core of Sustainable Waterloo Region's team, the overall number of volunteers fell alongside the rise in paid staff, producing smaller staff- to-volunteer ratios than had previously been the case. This change also led to the development of a new set of roles, the Functional Area Managers (FAM). FAMs include both paid staff and volunteers leading program areas or core functions. This was a strategy to bring all managers together as more of an equal team and break down barriers that emerge between paid staff and highly-skilled volunteers with managerial responsibilities.

**Fig 4. Information flow stage 3: Through the establishment of Functional Area Manager meetings and an organization's structure variation, interconnections among areas were recovered in order for all managers to be aware of the organization's development in the specific areas.**



Volunteer FAMs were also paired with other full-time managers to support their work and development while taking on key responsibilities themselves. As a critical operational back-up, the pairing allows paid staff to step in and continue activities when the volunteer FAMs are unavailable, which is often during core business hours as most volunteer FAMs have regular paid employment. This approach improved risk-management and ensured continuity of service.

The FAM model has been used as a means of improving information flows between different areas in the organization. FAMs also have regular meetings amongst themselves in which they build relationships across functional units in the organization with the effect of recapturing some of the nimbleness of Sustainable Waterloo Region's start-up period at scale.

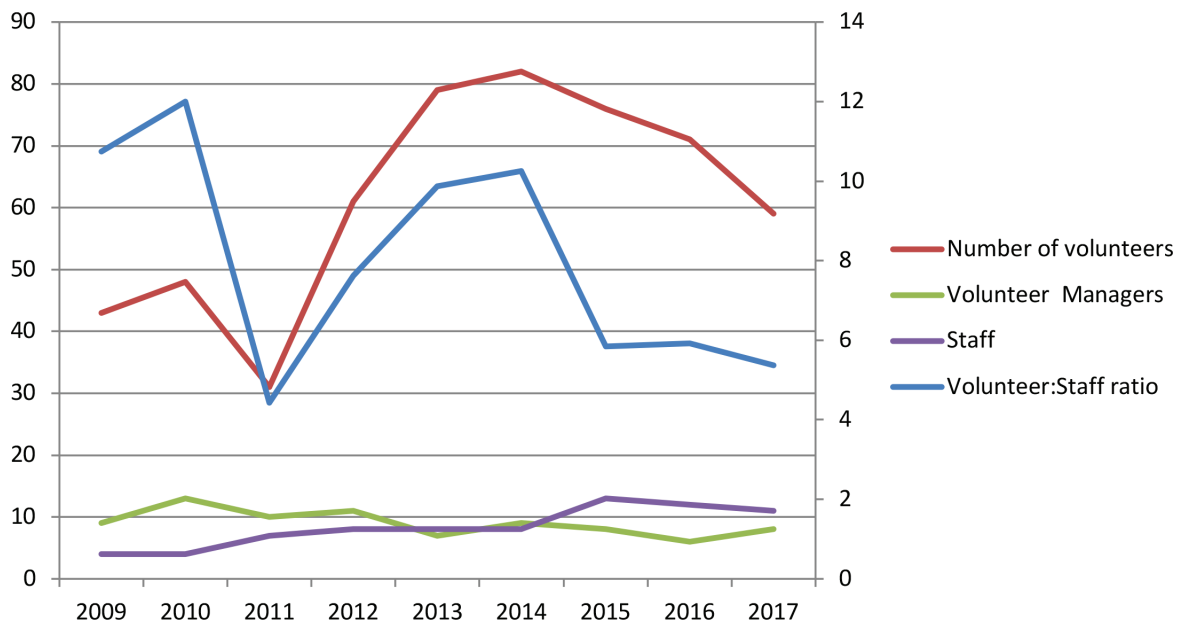
This 2014 to 2018 period is the *Solidifying* phase of Sustainable Waterloo Region's strategic volunteer program, and it is in the process now of transitioning to the *Scaling* phase in its strategic volunteer program.

## Resources

We see these different phases when we look quantitatively at how resource flows have changes to and through Sustainable Waterloo Region over time. We focus on six key pieces of data to show how the organization has changed:

1. Number of volunteers: People who worked for the organization under different job descriptions (except for Functional Area Managers) and did not receive economic compensation for their work
2. Number of Functional Area Managers: Volunteers who lead functional areas
3. Number of paid staff: People hired by the organization who received economic compensation for their work
4. Volunteer-staff ratio: Total number of volunteers divided by the number of paid staff
5. Partnerships: Number of member organizations in Sustainable Waterloo Region's programs including corporations, educational institutions, municipalities, and other nonprofit organizations
6. Financial and in-kind contributions: Financial resources given to Sustainable Waterloo Region from public and private sector contributors as well as an estimate of the in-kind value provided by volunteers; other in-kind contributions from Sustainable Waterloo Region's stakeholders (ex. IT support, legal services, etc.) were excluded from this analysis

**Fig 5. Sustainable Waterloo Region’s Volunteer and Staff Complement, 2009-2017**

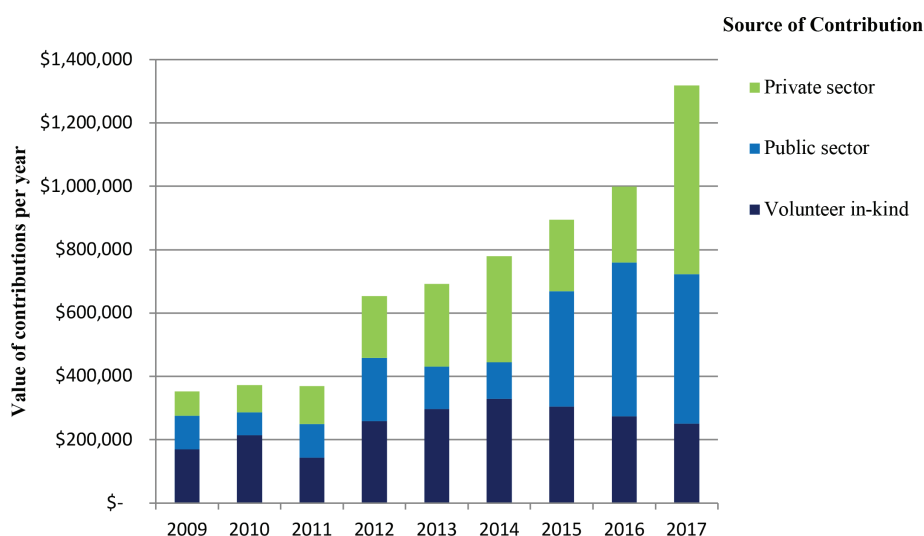


The relationship between the number of volunteers and staff impacts primarily on the team’s capacity to support volunteers more closely; during the highest peak of staff-volunteer ratio 1 staff needed to support 12 volunteers in their work and skills development, in contrast, for 2017 the relationship is only 1 to 5, which allows a deeper involvement in the volunteer’s professional development process and a better balance between their core work activities and volunteer support.

In addition, although volunteer contributions have been very significant since the organization’s foundation, in 2011, by hiring more staff (as fig 5 shows) Sustainable Waterloo Region was able not only to recover volunteers’ engagement for the following years but also increase community engagement and total contributions

To calculate the volunteer labour contribution, we used the number of hours each person volunteered multiplied by the hourly rate according to their role. In order to maintain hourly rates consistent with the broader nonprofit sector and coherent with the value of the workforce in the organization, we used an average of the hourly rate paid by Sustainable Waterloo Region for each level position. (\$14/per hour for entry-level positions, \$18.25/ hour for coordinators, and \$25.60/ hour for managers). The entry-level position salaries are based on the Ontario minimum wage and the other rates are estimated based on Sustainable Waterloo Region’s staff salaries for similar-level positions.

**Fig 6. Financial and In-Kind Contributions from Source, 2009-2017**



To provide a sense of how the value of volunteer time was calculated below is a table showing hours volunteered by type of volunteer and our estimated hourly value. The students and recent graduate hourly value was estimated by \$14.00, the mid-career or professional hourly value of volunteering was estimated by \$18.25, and the Functional Area Manager hourly value of volunteering was estimated at \$25.60. According to our calculations, the value of paid staff time devoted to managing and recruiting volunteers produces highly leveraged returns, with an estimated \$66863 in staff time bringing in \$251491 of value in volunteer labour contributions, ratio of almost 3.8 to 1.

**Fig 7. Volunteer value contribution by type, 2017**

Type of volunteer	Number of volunteers	Hours volunteered	Estimated hourly value	Total value contributed	Share of volunteer value contributed
Students and recent graduates	24	4160	\$14	\$58,240	23%
Mid-career or professional	35	5932	\$18.25	\$108,259	43%
Functional Area Managers	8	3320	\$25.60	\$84,992	34%
All volunteers	67	13412	\$18.75 (average)	\$251,491	100%

# Benefits to stakeholders

Fostering mutually-beneficial relationships between a non-profit organization and its stakeholders is critical to maintaining an inflow of resources to conduct its mission-aligned work and to amplifying the impact of that work. Here we consider the most important benefits to different key stakeholder groups involved in their volunteer model – including Sustainable Waterloo Region itself – from a workforce development lens.

## Volunteers

The workforce development benefits of these volunteer experiences differ according to the career phase of each volunteer. We found that the overall value of these benefits is highest for those early in their careers because Sustainable Waterloo Region offers development opportunities for which there are few available substitutes. However, as volunteers are more advanced in their careers this value diminishes because the development opportunities they have at work, in advanced education or training, and in other volunteer organizations increases. That said, for many at all skill levels their volunteering operates at a higher organizational level of responsibility than what their current employment or schooling allows, enabling them to develop new skills and to explore new career paths in ways whose value is not easy to capture.

### **Benefits to volunteers:**

#### **Student volunteers and recent graduates**

- Professional experience
- Skill development
- Professional networking opportunities

#### **Mid-career and professional volunteers**

- Professional experience
- Skill development
- Professional networking opportunities
- Opportunities to change their career paths

#### **Functional Area Mangers**

- Professional networking opportunities
- Opportunities to change career paths.

In our analysis we found that, on balance, from a workforce development perspective it is only those early in their careers who directly receive more value from volunteering than they contribute. This alone should not be taken as a sign that volunteering is counter-productive for those in later career stages, just that some of the benefits are hard to capture and model formally such as the development of innovative new ideas or might be undervalued in our model, such as the value of networking or exploring new career paths. More importantly, this report explicitly excludes some of the most important reasons people volunteer at Sustainable Waterloo Region. Their volunteers believe in their mission, enjoy the camaraderie of working with the organization's team, and build self-confidence that comes from contributing their time to a cause they value. We exclude these elements from our model to improve its generalizability, but any organization looking to build a strong volunteer program must keep those organizational values central.

## Sustainable Waterloo Region

The benefits to Sustainable Waterloo Region itself are multifaceted as this volunteer program not only provides access to additional resources, it also changes the nature of the relationships it has with a variety of community stakeholders. Because of this the benefits from this volunteer model extend beyond access to volunteer labour itself, accessing all the following benefits can only be achieved when volunteerism is closely integrated into a nonprofit's overall strategy.

### **Direct benefits to Sustainable Waterloo Region:**

- Capacity-building
- Community engagement
- Access to networks and talent pools
- Improved transparency and support through ambassadors
- Professional experience for paid staff
- Skill development for paid staff
- Expanded paid staff networks
- Transferrable paid staff work experience

Taken together these benefits create critical strategic synergies. These are impacts that come from combining the resources and networks that volunteers provide with other organizational objectives. To avoid over-claiming in our SROI analysis these are not fully

modelled, however there is anecdotal evidence to suggest that these have greatly expanded the range of activities and the overall ambition of Sustainable Waterloo Region. Of course, the expansiveness of this program also comes with operational costs that a non-profit seeking to replicate these results must also take into account.

### **Strategic benefits to Sustainable Waterloo Region**

- **Empowerment that allows them to collaborate in more complex projects:** Ambitious initiatives such as *evolvr1* which requires close cooperation with multiple stakeholders (City of Waterloo, The Cora Group, Wilfrid Laurier University, the University of Waterloo, and the Accelerator Centre) would be unlikely without the development of trusting volunteer and alumni networks
- **Access to high-quality talent:** Close bonds with educational institutions and a strong track record has elevated Sustainable Waterloo Region's volunteer positions to be quite competitive amongst a hard to access young labour pool
- **Development of internal talent.** Relatively low-skill volunteers who build skills and experiences remain attached to the organization's culture and mission, becoming high-value Functional Area Managers or strong external ambassadors
- **Elevation of their role as a local leader organization:** Sustainable Waterloo Region's annual Evening of Recognition has become 'the place to be' to get community validation for any organization's sustainability efforts
- **Funding:** Having volunteers at every level of the organization greatly improves external operational transparency which improves trust while also extending the breadth of networks that Sustainable Waterloo Region can access

### **Costs to Sustainable Waterloo Region:**

- Higher administrative and managerial skills needed, particularly in volunteer management
- Increased difficulty in recruiting for specific roles
- Risk in reliance of volunteers for core activities

## **Local governments**

Sustainable Waterloo Region counts a number of local governments among its program members: the Region of Waterloo, cities of Cambridge, Kitchener, and Waterloo, and the townships of North Dumfries, Wellesley, Wilmot, and Woolwich. Again the benefits outlined here are those specific to the volunteer model rather than those from the mission-driven

sustainability domain in which volunteer engagement also likely leads to improved public discourse and overall policymaking. This is a much harder benefit to value but is certainly important in enhancing the vibrancy of local democratic institutions.

### **Benefits to local government**

- improved institutional capacity,
- provision of a high-skilled and work-ready pool of labour for other local nonprofits,
- enhanced strategic collaborations and partnerships with community groups,
- greater community engagement in advancing policy goals – particularly youth engagement, and
- improved knowledge transfers across organizations that reduces the need for formal training programs

### **Local businesses**

Much like the case of local governments, the benefits to local businesses include but extend beyond those who are program members. We focused on this goal for two reasons. First, many of the benefits that local businesses see are actually captured elsewhere in our analysis, primarily through career benefits to volunteers.

### **Benefits to local business**

- access to a higher productivity, experienced workforce

Second, there are benefits which are simply too complex to capture at this point and may be tied directly to the organization's mission. For example, while there is a general skill development that comes from the volunteer programming, there are also skills which are specifically tied to sustainability. This is a rapidly growing but niche field, and for local businesses Sustainable Waterloo Region is both articulating the need strategically engage in this field and, through its volunteer program, training-up the skilled people needed to do so. These are impacts that have not been captured in this analysis but may prove quite impactful.



## Local educational institutions

Local educational institutions are a primary source of many volunteers. For Sustainable Waterloo Region, these partners are primarily the post-secondary institutions Wilfrid Laurier University and the University of Waterloo, though nearby Conestoga College could be a future partner as relationships with academic institutions continue to develop. For other nonprofits these partners could be a mixture of primary and secondary schools, colleges, universities, or trade programs.

### Local educational institution benefits

- unique opportunities to develop student skills
- improved educational institute-community bonds

## Core elements

The Sustainable Waterloo Region model has early career volunteers working closely with highly experienced volunteer professionals and paid staff. Staff and experienced volunteers help new volunteers build skills and ease into their high-demand organizational culture, with the newer volunteers quickly taking on greater responsibilities, producing critical deliverables, and ultimately becoming highly experienced volunteers themselves. This culture has been part of Sustainable Waterloo Region from its earliest start-up days and there are five core elements of their model that have been with them from the beginning.

### Five Core Elements of the Sustainable Waterloo Region Volunteer Model

1. Staff Engagement with Volunteers
2. Build High Impact Positions
3. Have Clear Benefits for Volunteers
4. Develop Clear Role Descriptions
5. Recognize Volunteer Contributions

## **Staff Engagement with Volunteers**

All staff positions must be designed with volunteer support in mind. This does not necessarily mean that all staff should be supporting volunteers, but all staff should be involved in identifying opportunities for existing volunteers and new volunteer positions. From our estimates, 15-25% of time for each staff person at Sustainable Waterloo Region involves volunteer interaction, support or development. This is opposed to a more common model of having designated volunteer coordinator positions to manage the recruitment, management, retention of volunteers. Indeed, because many Functional Area Manager positions are filled by volunteers rather than paid staff many of these volunteer development roles are played by experienced volunteers themselves.

This distribution of volunteer management capacity throughout the organization means that there are core responsibilities that all staff have. First, the fundamental core programs offered by Sustainable Waterloo Region must be provided by paid staff to ensure quality control for these programs. Second, staff have to both maintain an informal organizational memory and bring volunteers into the organizational culture. Finally, staff have to continually create opportunities for both current and future volunteers to do high-impact work.

## **Build High Impact Positions**

In order to elevate the volunteer's role and enable the volunteer to both make substantial contributions to the organization and receive high compensation, the organization needs to have high expectations. For this, volunteers need to be selected via an effective recruitment process in which skills are identified and matched with the organization's requirements and both sides understand what to expect from each other. By doing this, trust is developed and the risk of bringing on a volunteer with low commitment or interest is reduced.

Having volunteers engaged in this way gives them responsibilities in critical functional areas for the organization. While many pieces of mission-oriented work differ organization to organization, there are key functions that will always be present. Roles such as marketing, human resources, business development, finance, and information technology are common to all organizations and can be filled by volunteers. These are also positions in which the skills volunteers develop will be easily transferred to other organizations and sectors. By designing roles in these areas that have high expectations for volunteers this also sets the groundwork for clearly articulating strong win-win engagements.

## **Have Clear Benefits for Volunteers**

Make sure that the organization and volunteers both recognize how volunteers are being compensated. While it is not with a salary, if volunteers receive support in their skills development, a community to be a part of, increased confidence, access to a strong internal and external organizational network, or other benefits depending on the organization and position, then ensure that these benefits are articulated. This articulation sets expectations that volunteers and the organization can both refer to for mutual accountability.

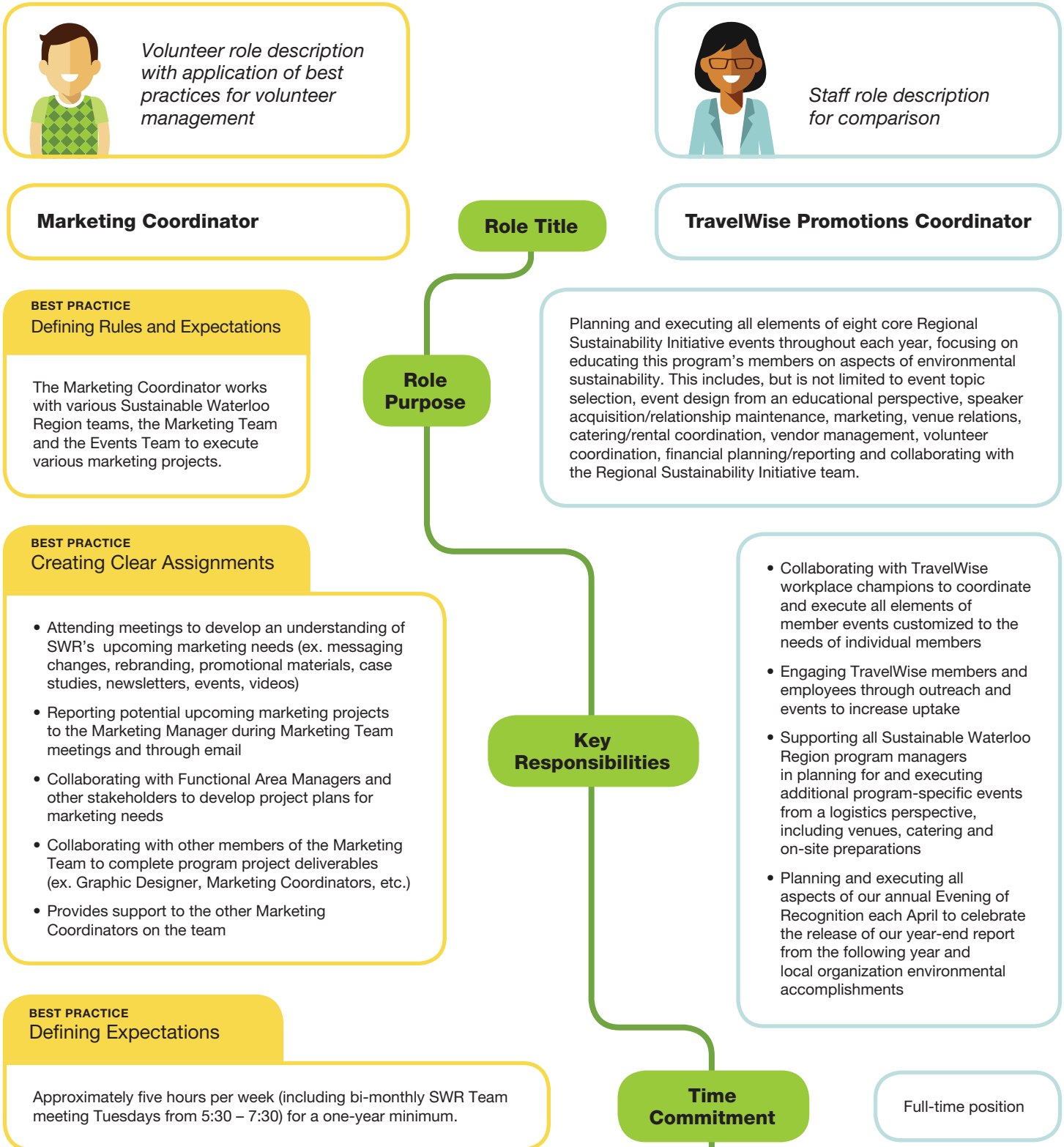
Then follow through. Create those opportunities for development, networking, and experience. Enable genuine skills development by creating the space for interactions between new volunteers, experienced volunteers, and staff. Recognize volunteers' contributions and accomplishments, providing them with a platform for career development both inside and outside the organization.

## **Develop Clear Role Descriptions**

Formalizing staff engagement with volunteers, high impact positions, and the articulation of clear benefits to volunteers can be challenging and a powerful foundation for doing so is the development of clear role positions. From its earliest days Sustainable Waterloo Region's role descriptions have defined clear rules and expectations for all positions, clearly assigned responsibilities, required time commitment, skills required to perform the position, training and supervision supports, and anticipated benefits from being in the role.

These descriptions exist for all volunteer positions and all paid staff positions. These role descriptions clearly embed the core values of this volunteer model and set the mutual expectations that are needed to ensure both the organization and its volunteers follow-through on their mutual obligations.

**Fig 8. Role descriptions: Example application of best practices of volunteer management**



The Marketing Coordinator will receive an SWR email address and access to Google Drive, allowing him/her to complete volunteer tasks remotely or in the Sustainable Waterloo Region office at Kitchener City Hall.

**Location**

Sustainable Waterloo Region's office

**BEST PRACTICE**  
Develop Volunteer Management Skills

- Excellent written and verbal communications skills
- Strong project management skills
- Marketing and/or communications experience an asset
- Keen eye for detail
- Interest in being part of a collaborative team, but with the ability to work independently and remain self-motivated
- Post-secondary degree in English or related field an asset
- Passion for environmental sustainability

**Skills and Qualifications**

- A demonstrated ability to creatively integrate a theme into an event, making it stand out
- Strong communication skills, both verbal and written
- Strong interpersonal and customer service skills, with the ability to connect with a diversity of people
- Experience working with and managing vendor relationships
- Outstanding organizational skills
- The ability to multi-task, take on multiple projects at one time, and respond quickly to changing expectations

**BEST PRACTICE**  
Orienting and Training

The Marketing Coordinator will meet with a representative from our HR team for a two-hour overview of Sustainable Waterloo Region and the basics of volunteering with our organization.

Following this, the Marketing Manager will guide this individual through his/her initial months in the role providing ongoing feedback. He/she will also have the opportunity to meet with an HR team representative for a 3-month check-in.

**Orientation and Training**

For this role, there is no specific training.

**BEST PRACTICE**  
Providing Supervision

Marketing Manager

**Supported by**

TravelWise Manager

**BEST PRACTICE**  
Description of Compensation

The Marketing Coordinator will have the opportunity to be part of a team of like-minded individuals who are passionate about sustainability, while also making connections with other marketing-focused volunteers. He/she will have access to a reduced price GRT bus pass through SWR's TravelWise membership.

**Role Benefits**

Salary: XXX CAD

**BEST PRACTICE**  
Reducing Client and Group Risk and Reaching Beyond the Circle

Volunteer candidates are required to submit a resume/cover letter to [recruitment@sustainablewr.ca](mailto:recruitment@sustainablewr.ca) and participate in an in-person interview with an HR representative and the Marketing Manager from Sustainable Waterloo Region.

**Screening**

Submit your cover letter and resume to [recruitment@sustainablewr.ca](mailto:recruitment@sustainablewr.ca), with your name and the position title clearly marked in the subject line

## Recognize Volunteer Contributions

Providing development opportunities and an enjoyable volunteer experience must also be coupled with an external recognition of volunteer efforts. Organizations with a strategic volunteer program must provide platforms to recognize the contributions and achievements of their volunteers. Moreover, such platforms should be constructed in a way that enables volunteers to take advantage of the benefits that have been explicitly outlined for them throughout their volunteer experience. While approaches to recognizing volunteers will differ depending on the organization, this recognition should include a mixture of internal and external elements while also taking into account the goals and preferences of volunteers themselves. For example, at Sustainable Waterloo Region volunteer successes are often internally recognized at regular volunteer meetings, and externally all volunteers are invited to their annual Evening of Recognition and have their names listed in Sustainable Waterloo Region's Year End Report.

### Sustainable Waterloo Region's Evening of Recognition

Since 2009 every spring Sustainable Waterloo Region hosts their annual Evening of Recognition. The organization's program members, volunteers, and supporters from across the community attend this event. Each year the event has over 200 attendees include executives from companies in the region, civic leaders including local mayors and Members of Parliament, and representatives from local academic institutions. Major environmental initiatives from program members are showcased here and it also serves as the premiere local environmental professional networking event. Since Sustainable Waterloo Region's founding all volunteers and volunteer alumni have been invited to these events, and the list included here from their 2017 Year End Report does not distinguish paid staff from volunteers.

ALL OUR THANKS GO TO YOU			
Volunteers	Office Team	Board of Directors	
<b>BUSINESS DEVELOPMENT</b> Jordan Bean Carina Bicchii Michael Brennan Nicholas Darmanie Cheryl de la Cruz Andy Mao Mariah Smith Elizabeth Wong	<b>FUND DEVELOPMENT</b> Kara Klassen Eunize Lao Cindy Luu  <b>HUMAN RESOURCES</b> Karen Rittinger Yvonne Stoll  <b>IT SUPPORT</b> Paul Sobering  <b>MARKETING</b> Christine Bui Anne Forler Lori Gallagher Sarah Harwood Dave Klassen Raheleh Mohammadi Christine Robson John Rockefeller Paul Sobering Gabriel Tan-Chen  <b>PUBLIC RELATIONS</b> Tamara Blagojevic Valerie Chong Lexi Halley Kelly McMath Alexandra Wong	<b>PROGRAM DEVELOPMENT</b> Arcy Canumay Mary Granskou Christine Jewell Janet Kimantas Andreas Martes Jen van Overbeeke  <b>REGIONAL SUSTAINABILITY INITIATIVE</b> Nicholas Cloet Anna Fluder Tasha-Leigh Gauthier Patricia Huynh Jen Owens Jenna Paton Tarana Persaud Andrea Quinn  <b>STRATEGY &amp; GOVERNANCE</b> Marty Finestone Janette Kingsbury Leandra Mariani Sheldon Pereira Farzana Rahman Caitlin Scott Marianne Windrow  <b>TRAVELWISE</b> Madeline Smith Basak Topcu	<b>STAFF</b> Arcy Canumay Lisa Chapman Kate Daley Tova Davidson Matthew Day Lexi Halley Danielle Laperriere Tarana Persaud Samantha Tavenor Allan Taylor Katie Wall  <b>INTERNS</b> Zain Bandali Nicholas Darmanie Riley McKenzie Olivia Muysion Julia Witmer Terry Zhang
		<b>Barry Colbert (Chair)</b> The Co-operators Centre for Business & Sustainability, Lazaridis School of Business & Economics, Laurier <b>Kevin Fernig</b> Simteo <b>Susan Jantzi</b> Sun Life Financial <b>Michael Letourneau (Secretary)</b> Sorbara, Schumacher, McCann LLP <b>Ian Miles</b> Energy+ <b>Ian Rowlands</b> University of Waterloo <b>Glenn Scheels</b> GSP Group <b>Albert Singh (Treasurer)</b> Waterloo North Hydro <b>Diane Stanley-Horn</b> Athena Software <b>Jan Varner</b> United Way Waterloo Region Communities	
		<b>Ambassadors</b> <b>Victoria Alleyne</b> CatalystsX <b>Catharine Gerhard</b> Waterloo EDC <b>Joe Gordon</b> SOTI Research <b>Pete Lewis</b> Tech Wrackers Inc <b>Laura Rourke</b> Tigercat Industries <b>Carol Stewart</b> Association of University Research Parks	

# Applying the Model

While Sustainable Waterloo Region’s volunteer model was developed over the course of a decade, its core elements were present right from the beginning. Nonprofits looking to build a similar program in their own organizations should carefully weigh the costs and benefits of such an approach to gauge whether or not it aligns with their strategic objectives.

## Diagnostic check

Nonprofit leaders should perform a self-diagnostic to determine if adopting a volunteer model similar to Sustainable Waterloo Region’s is a good fit. Think critically about the key questions, then discuss your thoughts with your staff and the strategic leadership of your organization, be that an Executive Director, a Board of Directors, or advisors from critical stakeholder groups such as funders, beneficiaries, or community partners. A strategic volunteer program is not to be undertaken lightly and there should be strategic alignment at all organizational levels when moving down this path.

### Self-Diagnostic Questions

Question	No	Not yet	Unsure	Yes	We already do
Are there staff who are enthusiastic about providing volunteer support and development?					
Do we have staff who can devote 15-25% of their time to supporting volunteers?					
Can our current staff provide training and mentorship with minimal support?					
Do we have clearly defined role descriptions for our current staff?					
Do we have clearly defined role descriptions for our current volunteers?					
Can we articulate clear benefits to volunteers?					
Do we currently have outlets such as events, meetings, or newsletters in which volunteer contributions could be internally recognized?					

Do we currently have outlets such as events or publications through which volunteer contributions could be externally recognized?					
Do we have relationships with employers who work in a mission-related field?					
Do we have strategic connections with local educational institutions?					
Is there work that could be done that falls outside of existing regulatory restrictions, labour contracts, or other workplace rules?					
Is there a way of separating volunteers from personal information of clients or beneficiaries that may be legally sensitive?					
Are there roles that could be constructed which do not require a high degree of non-transferrable expertise to start (ex. doctors and nurses)?					
Is your organizational culture one in which volunteers and staff could collaborate on a 'level playing field'?					
Is your culture one in which new or young members of the organization feel comfortable voicing their opinions and feel like they are heard?					

Answering 'yes' to all of these questions does not automatically mean that a non-profit should develop a strategic volunteer program, nor does answering 'no' to any of these questions mean that a strategic volunteer program would be an unwise strategy. However, any place where there is a 'no' answer suggests a place where special attention should be paid in implementation to reduce the risk of negative outcomes and any 'yes' answers should be validated by other stakeholders within the organization. For large non-profit organizations the responses may be different across subunits and these questions can be useful in identifying where a strategic volunteer program could be piloted.

It is important to consider the size of an organization with a strong volunteer program and how it should evolve alongside the organization hosting it. For a small or start-up organization incorporating this approach will involve up-front costs in preparing job descriptions and developing recognition programming that can seem distracting from its core purpose. However, this early strategic alignment allows the volunteer model to co-evolve with the organization itself. For an established medium-sized or large organization a wholesale adoption of this model would be quite difficult. However, the introduction of a new program or incorporation of this model in a single functional area



such as marketing or information technology could present an opportunity to pilot at a small scale.

An additional strategic consideration is the overall ‘outward orientation’ of an organization. An attractive strategic volunteer program will have to constantly build networks to attract new volunteers and to maintain the valuable professional networks those volunteers will plug into for future opportunities. Building and maintaining these networks is quite resource-intensive and even for Sustainable Waterloo Region most of the workforce benefits it creates are actually captured by other stakeholders.

Because this report excludes the direct mission-related outcomes from having a large volunteer program – that is the actual impact on sustainability in Waterloo Region – what is likely the largest component of the organization’s internal cost-benefit calculation is set aside here. However, on a day-to-day basis the operational challenges that arise from investing in volunteer development without seeing returns can create pressure to restrict its size. As the organization grows, this makes it more important to ensure that the full range of impacts of this program are appropriately captured and backed with credible evidence.

## **Build from the foundation**

The Sustainable Waterloo Region volunteer model was built over 10 years of learning and adaptation in pursuit of the organization’s vision. Whether adapting this model into an existing volunteer program, using it in piloting a new internal program, or incorporating it into a start-up non-profit from the beginning it is important to start small and work up from there. Throughout this process keep the five core elements of a strategic volunteer program central:

1. Staff Engagement with Volunteers
2. Build High Impact Positions
3. Have Clear Benefits for Volunteers
4. Develop Clear Role Descriptions
5. Recognize Volunteer Contributions

Of particular importance is the distinction between volunteer roles created to directly provide goods or services with functional roles. Directly providing services to beneficiaries can often be in relatively low-skilled roles, such as serving in a soup kitchen, or in relatively high-skilled roles, such as serving as a volunteer doctor. While these positions are often personally rewarding, often these roles are not structured to offer many skill-development opportunities beyond experience in a work environment and exposure to an organization’s

culture. A similar thinness of skill-development opportunities often occurs around short-term event-based volunteer positions as well.

Constructing volunteer roles around functional areas such as human resources, marketing or finance often offers a clearer path towards skill-development.

**Fig 9. Three Phases of Strategic Volunteer Program Implementation**



# Impact and value creation

Sustainable Waterloo Region's strategic volunteer program is at a stage where it is moving from its *solidifying* phase into its *scaling* phase. At this point there is an increased strategic importance in the measurement of workforce performance, further incorporating volunteer workforce performance data into strategic decision-making, and communicating this workforce development value to external stakeholders.

As part of this process and as a demonstration that can be adopted by other non-profit organizations in this report we conduct an SROI analysis of Sustainable Waterloo Region's strategic volunteer program. This analysis explores the different impacts this strategic volunteer program has on key stakeholders, including volunteer skill development's impact on employability. Incorporating findings from this and similar analyses can make nonprofits more attractive to volunteers by clarifying potential benefits while also better aligning with the needs of employer-stakeholders in their communities. Taken together these pieces can help nonprofits develop better talent acquisition and volunteer development pipelines while also providing value to their broader stakeholder networks.

## Social Return on Investment (SROI) analysis

SROI is a framework for calculating the value that is created or consumed by programs or organizations. Its initial formulation came from Jed Emerson in 2000 and further developed by the United Kingdom's Office of the Third Sector which funded further development of the model starting in 2007. The core rationale for the development of the SROI framework was to provide a variant on cost-benefit analysis models that fit the needs of social enterprises.

SROI is a process that is used to estimate the value of social, economic and impact of an intervention. This impact is then compared to the cost of the initiative resulting in a ratio. For example, a 4:1 SROI ratio would mean that for every dollar invested, a program would deliver \$4 of social impact for every \$1 spent. Although this impact value cannot be completely captured in financial terms SROIs use financial proxies for these impacts to communicate value in the measurement of social, environmental, and economic outcomes. As a consequence a number of critical assumptions are made in producing any SROI analysis which in turn means that the stakeholders impacted by an intervention should be part of the process to suggest, adjust, and validate the impact measured developed.

Previous work has found SROI analyses conducive to work in the workforce development field. Commonly used outcomes and indicators are available for most interventions (e.g., job

placement, wages and hours, retention, and upgrades) and these outcomes are among the most easily monetized (Cooney & Lynch-Cerullo, 2014). Furthermore, SROI analysis uses a combination of qualitative and quantitative measurements and allows for the inclusion of different voices from an intervention's stakeholders. SROIs allows for the exploration and integration of these different perspectives by using a common language of investment and return.

## **SROI of Sustainable Waterloo Region's Strategic Volunteer Program**

Conducting an SROI analysis involves the following six steps:

1. Establishing scope and identifying stakeholders
2. Mapping outcomes
3. Evidencing outcomes and giving them a value
4. Establishing impact
5. Calculating the SROI
6. Reporting, using, and embedding

### **Establishing scope and identifying stakeholders**

This project calculated an SROI analysis of Sustainable Waterloo Region's strategic volunteer program in a single year, 2017. of operation of the volunteer program at Sustainable Waterloo Region for the primary stakeholders involved:

- Sustainable Waterloo Region itself,
- volunteers,
- local governments,
- local businesses, and
- local educational institutions.

This is a conservative scoping of the program's impact. Other stakeholders, including co-op students and interns, program members, and staff who do not work with volunteers were considered, but were ultimately left out of the SROI calculation because no significant changes were identified in their interactions with volunteers. Only a single year of impact was calculated even though this missed longer-term contributions that this volunteer model has made to skill development.

Additionally, employers supporting their employees while they volunteer at Sustainable Waterloo Region were left out of the calculation because there was not enough data to validate the impact of volunteer programming on them. Some of the potential impacts on these employers include having employees undergoing training that they are not responsible for funding, better external networks for their employees, and having greater employee enthusiasm and commitment resulting in better retention rates.

The most notable exclusion in this analysis is the directly mission-related impact. This means that the impact of Sustainable Waterloo Region's strategic volunteer program on its mission of enabling local organizations to convert their sustainability interest into action. While at first glance this appears to be an odd choice – and it is *the* critical impact any non-profit should consider in their human resourcing – this was done for the purpose of making this analysis generalizable beyond Sustainable Waterloo Region itself. This kept the analysis focused on workforce development.

This analysis also scoped the impact on innovation quite minimally. Partly this is because measuring innovation and entrepreneurial capacity is notoriously difficult. More importantly, this is because it is unlikely that these impacts could be captured without also referring to mission-specific impacts. For example, a key impact of Sustainable Waterloo Region's volunteer programming is that it has likely increased the capacity of local businesses to engage in the development of sustainability-oriented products and services by current and former volunteers familiar with the sustainability space. However, this impact will be highly dependent on each organization's individual mission.

Finally, personal volunteer non-pecuniary benefits have been scoped out. Volunteers are motivated by many things including a belief in the organizational mission, a wish to 'give back', and connection to the organization's culture and people. Again, these pieces are heavily dependent on an organization's specific culture and mission. A consequence of this is that for some classes of higher-skilled volunteers their SROI actually is calculated as being negative. This is largely a consequence of scoping out these elements, as it is clear that on balance these volunteers enjoy their work at least as much as the value of their contributions or they would not keep volunteering.

## Mapping outcomes

The initial mapping of possible stakeholders and impacts came from an overview of academic literature, analysis of Sustainable Waterloo Region documents, and interviews with key informants. This map was quickly narrowed in accordance with the scoping outlines that had been established for this analysis, with a further narrowing coming

from additional interviews and surveys with stakeholders. The rationale for including or excluding each element of the map is in Appendix A.

## **Evidencing outcomes, giving them a value and establishing impact**

Estimates of the key impacts for each stakeholder group are provided here. The social value of each outcome's impact was also estimated using proxies collected from academic literature and our data collection process. The value of these outcomes alone does not establish their impact. In an SROI analysis four additional elements reduce the impact of these outcomes and estimating these is also part of the SROI analysis (see Appendix B for further details). Note that because this SROI was scoped to a single year the drop-off effect was not included.

### **Establishing impact**

The following four factors must be taken into account when moving from estimating the value of outcomes to establishing their impact

- Deadweight: How much of the outcome would have happened even if the activity had not taken place?
- Displacement: How much of the outcome was being delivered by another intervention that is being used less?
- Attribution: How much of the outcome came from the contribution of other people or interventions?
- Drop-off: How much of the outcome diminishes with each passing year?

**Fig 10. Summary of SROI Outcomes and Impact for the Sustainable Waterloo Region Strategic Volunteer Program**

Stakeholder		Outcome	Estimated Value	Impact	Percentage of total value per stakeholder group		
Volunteers	Volunteers - students and recent graduates	Professional experience	\$ 3,360.00	\$ 42,336			
		Skills Development	\$ 2,691.36	\$ 23,512			
		Professional Networking	\$ 206.83	\$ 2,085			
	Volunteers - mid-career or professional (35 in this group)	Professional experience	\$ 4,380.00	\$ 41,063			
		Skills Development	\$ 2,691.36	\$ 20,573			
		Professional Networking	\$ 206.83	\$ 2,606			
		Opportunity to change career path	\$ 12,288.00	\$ 24,084			
	Volunteers - Functional Area Manager roles	Professional Networking	\$ 206.83	\$ 2,606			
		Opportunity to change career path	\$ 12,288.00	\$ 4,817			
	Total		\$ 38,319.21	\$ 163,681		26%	
Sustainable Waterloo Region		Capacity building	\$ 235,200.00	\$ 74,088			
		Community engagement	\$ 11,471.00	\$ 128,016			
		Access to network	\$ 290.00	\$ 27			
		Built ambassadors base, which increases transparency and support	\$ 5.00	\$ 913			
		High administrative skills and knowledge required to support volunteers contributions to functional areas and programs	\$ (58,440.00)	\$ (43,392)			
		Difficulty to recruit certain roles	\$ (2,190.00)	\$ (1,068)			
		Vulnerability in core activities when depend on volunteers	\$ (24,478.39)	\$ (12,209)			
		Sustainable Waterloo Region paid staff professional experience	\$ 8,355.00	\$ 8,422			
		Sustainable Waterloo Region paid staff skill development	\$ 2,691.36	\$ 2,638			
		Sustainable Waterloo Region paid staff expanded professional networks	\$ 206.83	\$ 782			
		Sustainable Waterloo Region paid staff transferable work experience	\$ 35.00	\$ 137			
		Total		\$ (62,054.20)		\$ 158,354	25%
		Local companies with access to Sustainable Waterloo Region volunteers (93 organizations in this group)		Access to higher productivity through workforce with experience		\$ 5,063.04	\$ 61,212
Total	\$ 5,063.04			\$ 61,212	10%		
Local educational institutions (3 in this group)		New student skill development opportunities	\$ 6,000.00	\$ 4,914			
		Develop University-community bonds	\$ 75,609.00	\$ 28,013			
		Total	\$ 81,609.00	\$ 32,927		5%	
Municipal governments in Waterloo Region (3 in this group)		Build institutional capacity	\$ 65,000.00	\$ 40,950			
		Provides a high skilled and ready workforce to support nonprofit organizations and other sector	\$ 3,360.00	\$ 39,433			
		Enhances collaborations by strategic partnerships between the community and organizations	\$ 38,000.00	\$ 53,295			
		Community engagement for common goals	\$ 65,000.00	\$ 89,505			
		Knowledge transfer across organizations, it reduces the need of training activities, for volunteers and for corporations	\$ 250.00	\$ 405			
		Total	\$ 171,610.00	\$ 223,588		35%	
Total			\$ 639,763	100%			

## Calculating the SROI

To calculate the SROI it is also critical to estimate the size of the inputs contributed into the model. Here the only input we looked at was time. For Sustainable Waterloo Region this was the total value of staff time dedicated to volunteer support. For volunteers, this was based on estimates of the financial value of the time they had volunteered.

**Fig 11. Valuing SROI Inputs for the Sustainable Waterloo Region Strategic Volunteer Program**

Stakeholder		Contribution	Financial Value
Volunteers	Volunteers - students and recent graduates	4160 hours volunteered	\$ 58,240
	Volunteers - mid-career or professional	5932 hours volunteered	\$ 108,259
	Volunteers - Functional Area Manager roles	3320 hours volunteered	\$ 84,992
Sustainable Waterloo Region		Value of staff time dedicated to coordinate and/ or supervise volunteers	\$ 8,250
			\$ 7,736
			\$ 7,437
			\$ 23,234
			\$ 7,400
			\$ 5,550
			\$ 7,257
Total			\$ 318,354

Combining the estimates of the impact of the strategic volunteer program and the value of the estimated inputs invested into the program results in a calculation of the SROI ratio. Because this was calculated for 2017 only the impact of the program on Sustainable Waterloo Region will vary from year to year depending on primarily staff time dedicated to volunteer support, the total number of volunteers, and the overall skill level of the volunteers at Sustainable Waterloo Region. All that noted, the estimated impact of this volunteer program is close to a 2:1 return.

**Fig 12. SROI Ratio Calculation for the Sustainable Waterloo Region Strategic Volunteer Program**

Present value of each year	\$ 634,551
Total Present Value (PV)	\$ 634,551
Net Present Value (PV minus the investment)	\$ 316,197
Social Return (Value per amount invested)	\$ 2



## Reporting, using, and embedding

The value of the 2:1 SROI shows a significant contribution to volunteer employability, increased capacity at Sustainable Waterloo Region, and increased local workforce capacity. It can be useful to break this down by the individual stakeholders.

**Fig 13. Net Workforce Benefits to key Stakeholders of Sustainable Waterloo Region’s Strategic Volunteer Program**

Stakeholder	Estimated Workforce Input Value	Estimated Workforce Impact	Net Workforce Benefit
Volunteers – students and recent graduates	\$58,240	\$67,933	\$9,693
Volunteers – mid-career or professional	\$108,259	\$88,326	-\$19,933
Volunteers – Functional Area Managers	\$84,992	\$7,423	-\$77,569
Sustainable Waterloo Region	\$66,826	\$158,354	\$91,528
Local government	N/A	\$223,588	\$223,588
Local businesses	N/A	\$61,212	\$61,212
Local educational Institutions	N/A	\$32,927	\$32,927

For volunteers the workforce development impact is low, often negative. This should not be interpreted as meaning volunteers ‘lose’ from their time at Sustainable Waterloo Region, far from it. The proper interpretation is that their primary motivation for being engaged with the organization is their commitment to Sustainable Waterloo Region’s mission and culture. These benefits are not captured in this analysis but are clearly critical. Moreover, the high value of these inputs suggests that volunteers at all levels are major in-kind major financial contributors to the organization. Without these contributions Sustainable Waterloo Region’s capacity to advance its mission would be greatly diminished.

For local government, local business, and local educational institutions this should not be interpreted as them not contributing to Sustainable Waterloo Region and just benefiting. These organizations all contribute to Sustainable Waterloo Region through their program membership fees, granting, sponsorships, and other funding supports. What it does mean is that in addition to their mission-aligned benefits, these stakeholders also receive workforce development benefits that often go unnoticed.

As these are all initial estimates of impact, moving forward Sustainable Waterloo Region and its stakeholders should monitor, validate, and reassess these estimates over time.

## Limitations of SROI estimates

SROI analyses do not come without their limitations. The portability of this process that allows it to be adapted for organizations or programs in different fields mean that while the overall process is similar between SROIs, small decisions about the list of benefits for the stakeholders, cost allocations, and impact assumptions mean that different people performing SROI analyses on the same program would inevitably produce different results. This analysis is meant to supplement strategic judgement and operational decisions, not to supplant them.

Moreover, there are major data gaps. Companies could not comment the individual performance of employees who volunteered at Sustainable Waterloo Region, leading to low participation rates from companies that have hired Sustainable Waterloo Region volunteers. As a result this study had to estimate the impact on worker productivity using another experiential learning program, co-op education. However, because volunteers hold leadership positions within Sustainable Waterloo Region and that our survey results showed volunteers had leveraged their experience to further their career progression, the impact of this volunteering experience is likely higher than our estimates. As with many other data and scoping decisions, our use of co-op data likely produced an overly-conservative result.

Finally, findings from SROI analyses cannot be compared between organizations in any consistent manner. This even includes other nonprofits with volunteer models developed along the lines of what Sustainable Waterloo Region has built, using their estimates. Indeed, this SROI analysis is unlikely to remain consistent over time as Sustainable Waterloo Region collects additional information about its strategic volunteer program into the future, improving the quality of the data available for use. The analysis here should be viewed as a baseline that we can improve upon over time.

# Strategic Integration of a Strategic Volunteer Program

The SROI analysis is useful in clarifying the impact of a strategic volunteer program on different stakeholder groups, but this information is not in itself useful unless it is used to frame and support decisions. Critically, an organization considering a strategic volunteer program must consider these workforce development impacts and whether they fit with the organization’s overall strategic objectives. It is their mission which will ultimately determine both the commitment of high-skill volunteers and whether having greater volunteer integration will enhance it.

## Focus on volunteer development

The most critical finding of this analysis is that the career benefit to volunteers differs according to where they are in their career and what they are doing with the organization. If we think of the value of an hour of volunteer time as being a balance between the value an organization provides its volunteers and what the value volunteers provide and organization, we can see that a volunteer experience levels increase the balance shifts strongly in the direction of volunteers being stronger net contributors to the organization.

**Fig 14. Integrating the impact of volunteers at scale**

Type of volunteer	Total benefit to volunteers	Total value of volunteered labour	Estimated workforce development benefit per hour volunteered	Estimated hourly value contributed	Net workforce development benefit to volunteer per hour worked	Necessary commitment to mission and culture
Students and recent graduates	\$67,933	\$58,240	\$16.33	\$14.00	\$2.33	Moderate
Mid-career or professional	\$64,242	\$108,259	\$10.83	\$18.25	-\$7.42	High
Functional Area Managers	\$7,4223	\$84,992	\$2.24	\$25.60	-\$23.36	Very high

As the balance contributions by volunteers shifts to being more strongly to the benefit of the organization the importance of commitment to its mission and culture should likewise increase. Because their limited time would also be of value to other organizations highly-skilled volunteers are sought-after, and this in turn means that their retention is of critical importance. However, unlike early-career volunteers the career-enhancing benefits for these volunteers are relatively weak meaning the importance of a connection to an organization's mission and community is much more important. Attracting these people can be difficult if they have not already had close connections with the organization, making the development of early-career volunteers into high-skilled volunteers an important strategic source of talent.

### ***For student and recent graduate volunteers***

- Be explicit in the clearest benefits from volunteering in recruitment and role descriptions: professional experience, skill development, and access to professional networks
- Embed high work standards to provide opportunities for development
- Maintain an open and welcoming culture that includes interaction between new volunteers, experienced volunteers, and paid staff
- Design 'volunteer career ladders' to model pathways that volunteers can take to advance to positions with higher impact and career development potential
- Maintain contact with volunteer alumni to build external partnerships, show appreciation, and to source future high-skill volunteers

### ***For mid-career and professional volunteers***

- Be explicit about benefits from volunteering with a particular emphasis on opportunities to explore new career paths and to join new professional networks
- Create opportunities to contribute to building and participating in the organization's culture
- Provide training in how to communicate the organization's mission clearly and effectively to external stakeholders
- Continue 'volunteer career ladder' modelling and couple this with mentorship or pairing programs with paid staff or volunteers in high-responsibility positions as preparation

## **For *Functional Area Manager* volunteers**

- Explicitly recognize the value of these volunteers; for example, at Sustainable Waterloo Region these are donors providing approximately \$10,000 of in-kind value
- Create opportunities for these volunteers to work with, train, and mentor newer volunteers
- Focus on explicitly identifying and communicating the value these volunteers provide the organization

Be aware that volunteer positions must also be designed with risk mitigation in mind. Operationally there must be sufficient organizational redundancy in critical functions to ensure consistent program delivery. For the roles themselves it is important to ensure the positions are mutually beneficial. There has rightly been a great deal of attention paid to the exploitative and often illegal nature of unpaid internships. While Ontario's employment laws are currently in flux, if unpaid roles take up a substantial portion of a volunteer's time on a regular basis – a position that is more than halftime might pose a risk – then it is worth reconsidering that role to ensure compliance with labour law.

## **Integrating more data over time**

Build a practice of collecting operationally-relevant data on volunteering and integrating this data into decision-making. Hard data can be used to identify trends in volunteer engagement, sourcing, and the skills they bring to the table. These can then be used to provide better formal structures to volunteer acquisition and development. On at least a semi-annual basis contact volunteer alumni to gain a sense of what value their volunteer positions provided them and if there is anything they have thought about in retrospect that could improve the impact of the experience for current volunteers.

The SROI analysis developed here can be a good starting point. Take the estimated impacts on each stakeholder group and make initial estimates of each group's inputs and impacts. Work with representatives of each stakeholder group to identify missing inputs or impacts and to adjust estimates of the value of each accordingly – these will vary by organization and will also change over time. Use this information to reframe the benefits to different stakeholder groups. For example, if you find that a particular volunteer role provides late-career professionals with consistent access to a pool of early-career potential employees, capture and estimate the value of those benefits to both parties. On the other hand, if you find that little volunteer programming overlaps with the objectives of local

governments then discount or eliminate that impact from the analysis and consider what that may mean for business development, granting, or advocacy strategies.

Try to capture a retrospective timeline of how the organization has evolved and where there were major strategic shifts to see what additional information can round out this story moving forward. On an ongoing basis track volunteer achievements individually and in contributing to organizational goals. Round out hard data with the personal narratives of volunteers; not only does this capture a richer sense of organizational culture and history, but it also helps identify benefits and contributions that might not otherwise be apparent.

## Focus on the core social impact

Ultimately an organization must consider a strategic volunteer program through a mission-driven lens. This means asking two questions:

- Is volunteer development core to the organization's mission?
- Is volunteer development a strategically important way of advancing the organization's mission?

The first question is about fit. For example, an explicitly workforce development organization with a skill-training focus will have volunteer development at its core. Part of what makes Sustainable Waterloo Region a useful case is that volunteer development is not an inherent core piece of the organization's mission.

This makes the second question just as important, and this is about whether there is still an operational value. Here Sustainable Waterloo Region has had volunteer development as a core operational principle since its founding and by leveraging this strategically it has led to larger, more impactful networks and a more innovative culture. Mission attracts volunteers, and volunteer development helps build deeper mission-commitment while also advancing the cause.

An organization may find that volunteer development is not strategically important. It could be that programming is so specialized in the skills required that finding appropriate volunteers is a challenge, as may be the case in advanced medical research. It could also be that managing and training volunteers from the accessible pool of recruits requires so much staff time that the impact ends up being at a net loss. Indeed, it may be that case that for organizations that have volunteer development aligned with their core missions that their current approach to volunteer development is not actually advancing their organizational mission.

## Moving forward

The decision of how to move forward with a strategic volunteer program is one that should be made in consultation with an strategic leadership. For organizations that do not have workforce development as core to their mission deeply integrating volunteerism and volunteer development can be a powerful way to enhance their mission impact and produce positive spillovers for local governments, businesses, and educational institutions. From a broader perspective the connections that form between new volunteers, experienced volunteers, paid staff, and the multi-sectoral professional network of a nonprofit's supporters provide opportunities for professionals at all stages in their career to find each other. By bringing all of these people together a nonprofit's strategic volunteer program creates the novel connections that can enable mission-driven innovation to flourish.

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## Appendix A: Key Stakeholder Impacts of Volunteering from Academic Literature

Stakeholder	Impact	Included	Reason	Source
Student Volunteers and recent graduates	Build professional experience	Yes	It impacts directly on workforce development	* Matt Hurst, 2012. E * Smith, K., Holmes, K., Haski-Leventhal, D., Cnaan, R. A., Handy, F., & Brudney, J. L. (2010). * Eley, D. S. (2013).
	Increase skills development	Yes	It impacts directly on workforce development	*Smith, K., Holmes, K., Haski-Leventhal, D., Cnaan, R. A., Handy, F., & Brudney, J. L. (2010). * Low, N., Butt, S., Ellis Paine, A., & Davis Smith, J. (2007).
	Build social contact and professional networking	Yes	It impacts directly on employability	* Matt Hurst, 2012.
	Increase Self-satisfaction	No	This doesn't have influence on workforce development or employability	* Smith, K., Holmes, K., Haski-Leventhal, D., Cnaan, R. A., Handy, F., & Brudney, J. L. (2010). * Holdsworth, C. (2010).
	Endorses the development of business knowledge skills	No	It is included in skills development	* Smith, K., Holmes, K., Haski-Leventhal, D., Cnaan, R. A., Handy, F., & Brudney, J. L. (2010).
	Obtain recognition from colleagues and friends	No	It is included in professional networking	* Smith, K., Holmes, K., Haski-Leventhal, D., Cnaan, R. A., Handy, F., & Brudney, J. L. (2010).
	Long term involvement in volunteering activities	No	This has an effect on the personal aspect, not in workforce development	* Smith, K., Holmes, K., Haski-Leventhal, D., Cnaan, R. A., Handy, F., & Brudney, J. L. (2010).
	Fulfilling requisites for graduation	No	This doesn't have influence on workforce development or employability	* Smith, K., Holmes, K., Haski-Leventhal, D., Cnaan, R. A., Handy, F., & Brudney, J. L. (2010).
	Enhance student academic development	No	This has no direct influence on workforce development	* Astin, A. W., & Sax, L. J. (1998).
	Development of trust among people in society	No	It is included in social contact	* Smith, K., Holmes, K., Haski-Leventhal, D., Cnaan, R. A., Handy, F., & Brudney, J. L. (2010)

Stakeholder	Impact	Included	Reason	Source
Student Volunteers and recent graduates (continued)	Promotes knowledge creation and knowledge sharing	No	The surveys didn't allowed us to obtain significant data	Laurie Mook, Femida Handy, Jorge Ginieniewickz, Jack Quarter; 2007
	Improve job opportunities	No	It is included in building professional experience and has direct impact on employability	* Hall, M., Lasby, D., Gumulka, G., & Tryon, C. (2006).
Volunteers in mid-career and professional stages	Build professional experience	Yes	It impacts directly on workforce development	* Matt Hurst, 2012. E * Smith, K., Holmes, K., Haski-Leventhal, D., Cnaan, R. A., Handy, F., & Brudney, J. L. (2010). * Eley, D. S. (2013).
	Increase skills development	Yes	It impacts directly on workforce development	*Smith, K., Holmes, K., Haski-Leventhal, D., Cnaan, R. A., Handy, F., & Brudney, J. L. (2010). * Low, N., Butt, S., Ellis Paine, A., & Davis Smith, J. (2007).
	Build social contact and professional networking	Yes	It impacts directly on employability	* Matt Hurst, 2012.
	Offer the opportunity to change career path and improves individual's empowerment with career development	Yes	This was captured during data collection as the opportunity to select and change career paths, it impacts directly on workforce development	* Spokane, 1991
	Increase Self-satisfaction	No	This doesn't have direct influence on workforce development or employability	*Smith, K., Holmes, K., Haski-Leventhal, D., Cnaan, R. A., Handy, F., & Brudney, J. L. (2010).
	Superior physical and psychological performance, high levels of life satisfaction, reduced depressive symptoms, stress reduction	No	This doesn't have direct influence on workforce development or employability	* Lum, T. Y., & Lightfoot, E. (2005). * Morrow-Howell, N., Hinterlong, J., Rozario, P., & Tango, F. (2003). * Musick, M. A., Herzog, A. R., & House, J. S. (1999). * Musick, M. A., & Wilson, J. (2003). * Van Willigen, M. (2000).
	Increase social capital	No	Its included in social contact and professional networking	* Ryser, L., & Halseth, G. (2014). * Handy, F., & Brudney, J. L. (2007).
	Integration to society os isolated people	No	Is it included in the increase of social capital	* Handy, F., & Brudney, J. L. (2007).

Stakeholder	Impact	Included	Reason	Source
Nonprofit organizations	Capacity Building	Yes	Impacts in the organization's capacity	* Light, P. C. (2004)
	Community engagement	Yes	It impacts in capacity building	Impact captured during the data collection process
	Access to network	Yes	It impacts in capacity building	Impact captured during the data collection process
	Builds ambassadors base, which increases transparency and support	Yes	It impacts in capacity building	* Grantmaker Forum, 2003 * Handy, F., & Brudney, J. L. (2007)
	High administrative skills and knowledge required to support volunteers contributions	Yes	It impacts in workforce development and capacity building	* Mook, L., Farrell, E., Chum, A., Handy, F., Schugurensky, D., & Quarter, J. (2014).
	Difficulty to recruit certain roles	Yes	It impacts in capacity building	Impact captured during the data collection process
	Increases vulnerability of core activities when depend on volunteers	Yes	It impacts in capacity building	Impact captured during the data collection process
	The organization's paid staff increases professional experience	Yes	Impacts directly on workforce development	Impact captured during the data collection process
	The organization's paid staff obtains skills development opportunities	Yes	Impacts directly on workforce development	Impact captured during the data collection process
	The organization's paid staff expands professional network	Yes	Impacts directly on workforce development	Impact captured during the data collection process
	The organization's paid staff obtains transferable work experience	Yes	Impacts directly on workforce development	Impact captured during the data collection process
	Volunteers expand the base of support for the organization, advocate for it even after volunteering.	No	It is captured in community engagement and impacts in capacity building	*Light, P. C. (2004). *Grantmaker Forum, 2003
	Low cost to evaluate products or services with low supervision	No	It is included in capacity building	* Handy and Brudney, 2007

Stakeholder	Impact	Included	Reason	Source
Nonprofit organizations <i>(continued)</i>	High marginal cost of volunteer labor, including recruitment, interviewing, screening, matching, placement, job description, orientation, supervision, training, performance review, maintenance of records, recognition, and fair and professional treatment	No	Not sufficient data	* Handy, F., & Brudney, J. L. (2007). *Handy and Brudney, 2015
	Paid workers may view volunteers as replacements for paid labor and create frictions in unionized environments	No	The surveys allowed us to identify this is not a sensation within the organization	* Mook, L., Farrell, E., Chum, A., Handy, F., Schugurensky, D., & Quarter, J. (2014). * Handy, F., & Brudney, J. L. (2007)
	Increases productivity in specific tasks since volunteers are looking to improve their already developed skills	No	It impacts in capacity building	* Handy, F., & Brudney, J. L. (2007). * Matt Hurst, 2012.
	Paid staff has access to knowledge sharing	No	Included in transferable work experience	* Mook, L., Handy, F., Ginieniewicz, J., & Quarter, J. (2007)
	Gives paid staff the opportunity to achieve better recognition as team	No	The impact was not representative for workforce development	Impact captured during the data collection process
	Paid staff could have problems with the volunteers	No	The data collection reflected this hasn't happened	Jil Lvicitus
	Paid staff has the opportunity to develop new skills through mentoring	No	included in staff's skills development	Impact captured during the data collection process
	Employers	Increases access to higher productivity through workforce with experience	Yes	Has a direct impact in employability
Employers where volunteers work	Employees receive constant skill development	No	Insufficient data	Impact captured during the data collection process

Stakeholder	Impact	Included	Reason	Source
Employers where volunteers work (continued)	Motivated and thankful employees	No	Insufficient data	
	The cost it represents for companies to provide employees time to volunteer	No	Insufficient data	* Matt Hurst, 2012.
	Time provided for the employee to volunteer	No	Insufficient data	Impact captured during the data collection process
Educational institutions	Offer students skill development opportunities	Yes	It impacts workforce development	Impact captured during the data collection process
	Supports the development of existing university-community relationships	Yes	Impacts directly on workforce development and capacity building	* Holdsworth, C., & Quinn, J. (2010). * Smith, K., Holmes, K., Haski-Leventhal, D., Cnaan, R. A., Handy, F., & Brudney, J. L. (2010).
	It requires effort to tie volunteering into career opportunities and highlight its instrumental benefits	No	Insufficient data	*Smith, K., Holmes, K., Haski-Leventhal, D., Cnaan, R. A., Handy, F., & Brudney, J. L. (2010)
Local Community	Contributes to build Institutional capacity	Yes	Has a direct impact in capacity building	* Cars, G., Healey, P., Madanipour, A., & De Magalhaes, C. (2002).
	Provides a skilled and ready workforce to support not-for-profit organizations and other sectors	Yes	Has a direct impact in workforce development	* Emery, M., & Flora, C. (2006). * Ryser, L., & Halseth, G. (2014).
	Enhances collaboration by strategic partnerships between community and organizations	Yes	Has a direct impact in capacity building	* Howell, K (2016) * Emery, M., & Flora, C. (2006). * Ryser, L., & Halseth, G. (2014).
	Community engagement for common goals	Yes	Has direct impact on capacity building	Impact captured during the data collection process
	Knowledge transfer across organizations, which reduces the need of training	Yes	Has a direct impact in workforce development	* Ryser, L., & Halseth, G. (2014).
	Built social capital	No	It is included in community engagement	* Bowman, 2006
	Stablish culture of civic service	No	It is not a relevant impact for workforce development	* Stichting Present Report, Putnam, 1995

Stakeholder	Impact	Included	Reason	Source
Local Community (continued)	Volunteers provide services where the government or economic conditions fall short	No	It is not a relevant impact for workforce development	9, 2016 December. "How Volunteers Impact Communities." EPICS in IEEE, 9 Dec. 2016
	Development of trust among people and organizations in society	No	It is included in the improvement of collaborations between organizations and the community	* James C. Sarros, Brian K. Cooper, Joseph C. Santora, (2011) * Ryser, L., & Halseth, G. (2014)
	Improves employability of workforce	No	It is included in the skilled and ready workforce provided	* The Premier's Highly Skilled Workforce Expert Panel. (2016)
	Deliver public services	No	Has a direct impact in capacity building	* Salamon, L. M. (1994).
	Promotes social inclusion	No	It is included in community engagement	* Handy, F., & Brudney, J. L. (2007).
	Built institutional and workforce capacity for economic development	No	Included in capacity building	The Premier's Highly Skilled Workforce Expert Panel. (2016).
	Reduces the need of training activities, which are normally sponsored by firms and by governments, imposing burdens on the resources of nations	No	Included in knowledge transfer	* Ballot, G., Fakhfakh, F., & Taymaz, E. (2006).
	Adds to local GPD	No	Included in capacity building	* McKeever, B. S., & Pettijohn, S. L. (2014). * Salamon, L. M., Sokolowski, S. W., & Haddock, M. A. (2011)
Program Members	-	No	This group of stakeholders was not included due to having low relationship with the volunteer program	
Co-ops and interns	-	No	This group of stakeholders was not included due to having low relationship with the volunteer program	
Paid staff that doesn't work with volunteers	-	No	This group of stakeholders was not included due to having low relationship with the volunteer program	

# Appendix B: Social Return On Investment (SROI) Analysis of the Sustainable Waterloo Region Strategic Volunteer Program

Stage 1		Stage 2			Stage 3						Stage 4								
Who and how many?		At what cost?			What changes?		How long?		How much?		How valuable?				How much caused by the activity?				Still material?
Stakeholders		Inputs		Outputs	Outcomes	Evidence		Value (options)		Deadweight %	Displacement %	Attribution %	Drop off %	Impact					
Who do we have an effect on?	How many in group?	What will/did they invest and how much (money, time)?	Financial value	Summary of activity in numbers	Description	Duration of outcomes	Indicator and source	Quantity	Outcomes start	Ranking	Weighting	Financial Proxy	Value	What will happen/what would have happened without the activity?	What activity would/did you displace?	Who else contributed to the change?	Does the outcome drop off in future years?	Number of people times quantity times value, less deadweight, displacement and attribution	
Who has an effect on us?					How would you describe the changes that result from activities after involving your stakeholders?	How many years will/did it last?	How would you measure it?	Number of people	How much change per person?	Does it start in period of activity (1) or in period after (2)?	Lowest = 1	How much more important than the least important? Or scale, e.g. 1 to 10	What proxy would you use to value the change?	Where would/did you get the data?					
Sustainable Waterloo Region	1	Business Division Manager's Time Regional Sustainability Initiative Program Manager's Time Program Development Manager's time Executive Director's time TravelWise Program Manager's time Event Coordinator's time Climate Action Manager's time	\$ 66,863.10	6															
		Capacity building		1	The cost of hiring additional full time staff with the same expected productivity	1		1	1	7		\$ 235,200.00	\$ 235,200.00	30%	40%	25%	0%	74,088.00	
		Community engagement		1	Number of donors	93		1	1	6		\$ 11,471.00	\$ 11,471.00	25%	60%	60%	0%	128,016.36	
		Access to network		1	Membership fee Sustainable Waterloo Region pays to the Greater Kitchener-Waterloo Chamber of Commerce	1		1	1	4		\$ 290.00	\$ 290.00	75%	25%	50%	0%	27.19	
		Built ambassadors base, which increases transparency and support		1	Total number of volunteers in Sustainable Waterloo Region's history	326		1	1	5		\$ 5.00	\$ 5.00	20%	0%	30%	0%	912.80	
		High administrative skills and knowledge required to support volunteers contributions to functional areas and programs		1	Number of areas managed by volunteers but supported by Executive Director or Business Division Manager	2		1	1	3		\$ (58,440.00)	\$ (58,440.00)	45%	10%	25%	0%	-43,391.70	
		Difficulty to recruit certain roles		1	Lost productivity due to long time to fill positions (marketing and design)	1		1	1	1		\$ (2,190.00)	\$ (2,190.00)	25%	0%	35%	0%	-1,067.63	
		Vulnerability in core activities when depend on volunteers		1	Core program productivity at risk due to volunteer turnover	1		1	1	2		\$ (24,478.39)	\$ (24,478.39)	5%	25%	30%	0%	-12,208.60	
		Sustainable Waterloo Region paid staff professional experience		1	Managing volunteer teams has increase their professional proficiency	7		1	1	3		\$ 8,355.00	8,355.00	40%	40%	60%	0%	8,421.84	
		Sustainable Waterloo Region paid staff skill development		1	Did they learn during the time they have worked with volunteers skills to use at other workplaces	7		1	1	2		\$ 2,691.36	2,691.36	50%	60%	30%	0%	2,637.53	
		Sustainable Waterloo Region paid staff expanded professional networks		1	They have increase their future professional opportunities due to volunteers references or connections	7		1	1	3		\$ 206.83	206.83	25%	0%	28%	0%	781.82	
		Sustainable Waterloo Region paid staff transferable work experience		1	Cost per person (not member employee) for participating in a SWR event (workshop format)	7		1	1	1		\$ 35.00	35.00	20%	0%	30%	0%	137.20	
Volunteers - students and recent graduates	24	4160	\$ 58,240.00	22															
		Professional experience		1	Did their volunteering experience help them gain employment	24		1	1	2		\$ 3,360.00	3,360.00	25%	0%	30%	0%	42,336.00	
		Skills Development		1	Did they learn skills while volunteering that they use now at work	24		1	1	3		\$ 2,691.36	\$ 2,691.36	35%	20%	30%	0%	23,511.72	
		Professional Networking		2	Did their volunteer experience help them build career opportunities	24		1	1	1		\$ 206.83	\$ 206.83	40%	0%	30%		2,084.85	
Volunteers - mid-career or professional	35	5932	\$ 108,259.00	22															
		Professional experience		1	Did their volunteering experience help them gain employment	25		1	1	2		\$ 4,380.00	4,380.00	25%	0%	50%	0%	41,062.50	
		Skills Development		1	Did they learn skills while volunteering that they use now at work	21		1	1	3		\$ 2,691.36	\$ 2,691.36	35%	20%	30%	0%	20,572.76	
		Professional Networking		2	Did their volunteer experience help them build career opportunities	30		1	1	1		\$ 206.83	\$ 206.83	40%	0%	30%		2,606.06	
		Opportunity to change career path		1	Did their volunteer experience help them change career paths	10		1	1	1		\$ 12,288.00	\$ 12,288.00	65%	20%	30%	0%	24,084.48	



Stage 1		Stage 2			Stage 3						Stage 4										
Who and how many?		At what cost?			What changes?		How long?		How much?		How valuable?				How much caused by the activity?				Still material?		
Stakeholders		Inputs		Outputs	Outcomes		Evidence		Value (options)		Value (options)				Deadweight %	Displacement %	Attribution %	Drop off %	Impact		
Who do we have an effect on?		How many in group?		What will/did they invest and how much (money, time)?	Financial value	Summary of activity in numbers	Description	Duration of outcomes	Indicator and source	Quantity	Outcomes start	By stakeholder	How much more important than the least important? Or scale, e.g. 1 to 10	What proxy would you use to value the change?	What is the value of the proxy for the change per person?	What will happen/what would have happened without the activity?	What activity would/did you displace?	Who else contributed to the change?	Does the outcome drop off in future years?	Number of people times quantity times value, less deadweight, displacement and attribution	
Who has an effect on us?							How would you describe the changes that result from activities after involving your stakeholders?	How many years will/did it last?	How would you measure it?	Number of people	How much change per person?	Does it start in period of activity (1) or in period after (2)	Lowest = 1	Where would/did you get the data from?							
Volunteers - Functional Area Manager roles		8		3320	\$ 84,992.00	8															
							Professional Networking	2	Did their volunteer experience help them build career opportunities	30	1	1	1		\$ 206.83	\$ 206.83	40%	0%	30%	0	2,606.06
							Opportunity to change career path	1	Did their volunteer experience help them change career paths	2	1	1	1		\$ 12,288.00	\$ 12,288.00	65%	20%	30%	0%	4,816.90
Local companies with access to Sustainable Waterloo Region volunteers		93		Estimated productivity gains	0	1															
							Access to higher productivity through workforce with experience	1	The cost of hiring employees with professional experience	93	1	1	1		\$ 5,063.04	5,063.04	75%	20%	35%	0%	61,212.15
Local educational institutions: Wilfrid Laurier University, University of Waterloo; St. Paul's College		3		Effort to tie volunteering into career opportunities	0	3															
							New student skill development opportunities	1	High percentage of volunteers are students or recent graduates from these institutions	3	1	1	2		\$ 6,000.00	6,000.00	30%	40%	35%	0%	4,914.00
							Develop University-community bonds	1	Through its participations with SWR the universities remains connected to the private sector and delivering projects for the region	3	1	1	1		\$ 75,609.00	75,609.00	81%	0%	35%	0%	28,013.13
Municipal governments in Waterloo Region		5		Contributions are to general programs, not specifically volunteers	0	0															
							Build institutional capacity	1	Without SWR, the municipalities would need to hire additional staff to deliver the services they currently have with climate action and the WRSI	3	1	1	6		\$ 65,000.00	65,000.00	30%	0%	70%	0%	40,950.00
							Provides a high skilled and ready workforce to support nonprofit organizations and other sector	1	Total number of volunteers in SWR's history	326	1	1	5		\$ 3,360.00	3,360.00	80%	10%	80%	0%	39,432.96
							Enhances collaborations by strategic partnerships between the community and organizations	1	SWR organizes events through the year where members network, learn about others accomplishments and can identify areas to work together	3	1	1	4		\$ 38,000.00	38,000.00	15%	0%	45%	0%	53,295.00
							Community engagement for their common goals	1	SWR's multiplier effect communicates the municipalities' work to the public	3	1	1	3		\$ 65,000.00	65,000.00	15%	25%	28%	0%	89,505.00
							Knowledge transfer across organizations, it reduces the need of training activities, for volunteers and for corporations	1	SWR has provided training to municipalities when information or legislation has being updated in their joint work	3	1	1	2		\$ 250.00	250.00	20%	25%	10%	0%	405.00
Local companies with access to Sustainable Waterloo Region volunteers		93		Estimated productivity gains	0	1															
							Access to higher productivity through workforce with experience	1	The cost of hiring employees with professional experience	93	1	1	1		\$ 5,063.04	5,063.04	75%	20%	35%	0%	61,212.15
Local educational institutions: Wilfrid Laurier University, University of Waterloo; St. Paul's College		3		Effort to tie volunteering into career opportunities	0	3															
							New student skill development opportunities	1	High percentage of volunteers are students or recent graduates from these institutions	3	1	1	2		\$ 6,000.00	6,000.00	30%	40%	35%	0%	4,914.00
							Develop University-community bonds	1	Through its participations with SWR the universities remains connected to the private sector and delivering projects for the region	3	1	1	1		\$ 75,609.00	75,609.00	81%	0%	35%	0%	28,013.13
Municipal governments in Waterloo Region		5		Contributions are to general programs, not specifically volunteers	0	0															
							Build institutional capacity	1	Without SWR, the municipalities would need to hire additional staff to deliver the services they currently have with climate action and the WRSI	3	1	1	6		\$ 65,000.00	65,000.00	30%	0%	70%	0%	40,950.00
							Provides a high skilled and ready workforce to support nonprofit organizations and other sector	1	Total number of volunteers in SWR's history	326	1	1	5		\$ 3,360.00	3,360.00	80%	10%	80%	0%	39,432.96
							Enhances collaborations by strategic partnerships between the community and organizations	1	SWR organizes events through the year where members network, learn about others accomplishments and can identify areas to work together	3	1	1	4		\$ 38,000.00	38,000.00	15%	0%	45%	0%	53,295.00
							Community engagement for their common goals	1	SWR's multiplier effect communicates the municipalities' work to the public	3	1	1	3		\$ 65,000.00	65,000.00	15%	25%	28%	0%	89,505.00
							Knowledge transfer across organizations, it reduces the need of training activities, for volunteers and for corporations	1	SWR has provided training to municipalities when information or legislation has being updated in their joint work	3	1	1	2		\$ 250.00	250.00	20%	25%	10%	0%	405.00
<b>Total</b>					318,354.10																
															Total					639,763.38	
															Total Present Value (PV)					639,763.38	
															Net Present Value (PV minus the investment)					321,409.28	
															Social Return (Value per amount invested)					2.01	