

Virtual Volunteering

Introduction

Freeform Solutions (www.freeformsolutions.ca) is a non profit organization. Our mission is to help other non-profit organizations to realize their missions through the appropriate deployment of information and knowledge management systems.

One of the things that is novel about Freeform Solutions is that we are a virtual organization: we don't have any physical office space, so all of us work from home. Therefore we have developed a number of *processes* to support remote working. We have also found or adapted a number of pieces of *technology* to support those processes.

We think these distinctions are important: we always start with the people, then we figure out what the processes are needed to help those people work together. And only then do we figure out if technology can support those people in doing those processes.

So technology is the final rather than the first part of puzzle. The people and process come first, and if the right analysis and reflection is done in those areas, then finding appropriate technology is easy.

This is why we don't think of ourselves as tech-centric: we are far more interested in people and process. Technology is only useful if it actually helps.

People & Process

So what does “People and Process” mean in terms of Virtual Volunteering? Lets start by defining Virtual Volunteering:

Virtual volunteering means volunteer tasks completed, in whole or in part, via the Internet and a home or work computer.

Many people actively search for volunteer opportunities they can complete via home or work computers, because of time constraints, personal preference, a disability or a home-based obligation that prevents them from volunteering on-site. Virtual volunteering allows anyone to contribute time and expertise to not-for-profit organizations, schools, government offices and other agencies that utilize volunteer services, from his or her home or office.

[ServiceLeader.org]

It sounds like a great idea! Most non-profit organizations are under-resourced, and every organization is happy to welcome new volunteers in whatever way those volunteers feel they can contribute. However this is clearly a 'volunteer' oriented definition. Its focus is on what the volunteer can or cannot do, will or won't do.

Therefore to define what Virtual Volunteering means to the organization, or more importantly to *your* organization, we need to return to the question of 'People & Process' and to break this question down even further:

- who are your people? i.e your current volunteers?
- what skills do they have?

- what skills do you need?
- are there potential volunteers who are inaccessible to you due to their geographic location or mobility challenges?
- what are your processes?
- what tasks do you have that could be broken up and distributed to a Virtual Volunteer?
- do you have the capacity to support and manage the distribution of tasks to a group of Virtual Volunteers?

Clearly the best people to answer those questions are within your own organizations. You know your missions, you know the programs and projects that are being implemented to realize those missions and, most importantly, you know the people that are working to implement those programs. So some brainstorming and reflection is required to decide if Virtual Volunteering is even of use to your organization.

There are a large number of resources available online to help you work on those questions, to give you some idea of what people you might look for, what skills they might have, where you might find them, and what tasks they might do for you, and how you might go about managing them. Here are some of the better ones that I found:

- ServiceLeader.org has a large selection of resources available for free (starting at <http://www.serviceleader.org/new/virtual/>). They describe how to develop a Virtual Volunteering Program, what kind of work a Virtual Volunteer can do, how to ensure your organization and your volunteer benefits from the experience, resources for volunteer managers and even a selection of sample assignments to give you a flavour of what is possible.
- TechSoup.org is an amazing resource for all kinds of information on non-profit information management. It has published several articles on Virtual Volunteering, including a description of a pioneering project in Winnipeg (see <http://www.techsoup.org/learningcenter/volunteers/archives/page10251.cfm> and <http://www.mys.ca/volunteer-virtual.php> for more on this story) and another article entitled “Myths about Online Volunteering” which tries to help adjust your expectations about what is possible by having a Virtual Volunteering program: (<http://www.techsoup.org/learningcenter/volunteers/page7386.cfm>)
- Imagine Canada (previously the Canadian Centre for Philanthropy) has also some done research in this area and you find their publications here a couple of websites: (<http://volunteer.ca/volunteer/pdf/Murray-SR2-English-Web.pdf> and <http://publicadmin.uvic.ca/cpss/vsi/pdfs/vvfactsheet.pdf>)
- There is also an extensive (138 page!) guide to Virtual Volunteering on the EnergizeInc.com site (<http://www.energizeinc.com/download/vvguide.pdf>).

But before you all race off to read those fascinating articles and begin thinking and ruminating about the applicability of those ideas to your own organizations, I'm also going to focus a little on technology. Now, I know I said earlier that it is all about people & process first, and only then about technology. In reality most of our work iterates a number of times through these three stages. This is because sometimes the available technology can affect the way you think about your people and your processes. It is sometimes the case that the mere existence of a new way to communicate or work can open up your mind to possibilities that you had never even conceived before.

It is also the best way to give you some interesting examples, since this is actually how Freeform's people & processes are supported by technology.

Technology

One small confession: our own volunteer engagement is rather limited right now so you all probably know more about volunteer recruitment and management than I do. It is an area we are hoping to grow over the coming years and I'm hoping to learn from all of you about some of the issues involved in that.

But where our organization has some expertise is in working in a virtual office space. So I'll describe our people and our processes first and then tell you about the specific technologies we use to facilitate our work.

As noted earlier, we are a non-profit organization, but we have a somewhat unusual relationship with our funders. They are, in fact, our clients. So our funding comes on a per-hour basis: our clients need something done, they don't have the capacity to do it themselves, and they pay us by the hour to do it for them. So we have to prove ourselves, and the validity of our mission, to our funders on a monthly basis, and seek a mandate to continue. This process is more commonly known as invoicing!

So what do we do for our clients? Anything that might loosely be understood in the term 'information and knowledge management'. Anything except cleaning out your filing cabinets! We manage servers, fix email problems, make recommendations on hardware purchasing, build information management systems, design and manage websites, facilitate mailing lists, advise on IT planning and help our clients to align their information technology strategy with their organizational mission. Any activity which we believe can help another organization achieve its mission through the appropriate deployment of technology (or even the appropriate deployment of our technical knowledge!) is within our mandate.

These activities require:

- **Communication:** ideas need to flow between us as a team and between us and our clients
- **Consolidation of Ideas:** we need to reach agreement on our activities and document those outcomes
- **Traceability and Accountability:** we seek funding on a monthly basis, so we have to account for what we spend our time on

In all cases, we seek to support these activities with free and open-source tools, in order to minimize the cost to our client and maximize the impact of what our clients pay for. In other words we use tools that are freely available and which can be changed and improved, and then we contribute those changes and improvements back to the community that created them. There is not always an open source alternative, but when there is we use it, and when it falls a little short of what we need, we try to improve it. So some of our examples are open-source while some are not.

Furthermore, all of the tools we use need to work for a virtual office, so most of them are accessible via the Internet. So they may be relevant to you as a organization managing virtual volunteers, or virtual staff, or actual staff i.e. just because these tools are accessible via the Internet, it doesn't preclude you using them even if you are co-located.

Communication Tools

- **Email:** we use Thunderbird as our email client (www.mozilla.com/thunderbird/) and sendmail (www.sendmail.org/) as our email server and both of these are opensource and free.
- **Phones:** we use Skype (www.skype.com) for all our outgoing calls. It is free for us to call each other, or any of our clients who are also using Skype, free for skype-to-skype

conference calls (up to 24 participants) and free 'chat' or 'instant-messaging' client where we interact pretty constantly. We also have Skype subscriptions, which gives us voicemail for incoming calls, and free Skype-to-landline calls to anywhere in North America for \$3 per month.

For incoming calls we use an Asterisk server (www.asterisk.org) and the associated Zoiper SoftPhone application (www.zoiper.com). We pay a small amount to own a phone number, and then all incoming calls are answered by the server, which asks the caller to enter the extension number. If my extension is selected, the software phone rings on my computer, and if I don't answer, I get voicemail delivered to me by email.

- **Managing Contacts:** we have dabbled with a couple of different contact management systems and haven't quite found the one that meets our needs just yet. However, we have implemented a number of contact management systems that do meet the needs of our clients. Two that we use with a lot of clients are SugarCRM (www.sugarcrm.com) and CiviCRM (www.civicrm.org). SugarCRM is an industry oriented CRM that can be tailored to meet the needs of the non-profit sector. CiviCRM is designed for and managed by the non-profit sector, and is used by organizations such as large as Amnesty International and Wikipedia for their contact management and fund raising.
- **Desktop Sharing:** showing someone else what you are doing can really provide a short cut to solving a problem. We use WebHuddle (www.webhuddle.com) frequently for presenting demonstrations, or debugging issues, or just collaborating on a document. Another tool, TeamViewer (www.teamviewer.com) additionally provides remote control if such features are needed.

Consolidation of Ideas:

- **Writing:** we use the OpenOffice (www.openoffice.org) suite of tools to do all of our documentation: this is being written using OpenOffice Writer! It can save files that are compatible with Microsoft Office and it can read MS Office files too. And it's free and open source.
- **File Sharing:** we have some server space set aside for files that we share and we have a Virtual Private Network running to give us access to those files. This might sound complex but it is not. A server is really just another computer, but one that is always connected to the internet, and one that is configured to share some of its space with authorized users. It could easily be done on any computer in any office environment.
- **Collaborative Writing:** sometimes we want to work collaboratively on the same document or work through a more active and dynamic topic. In these cases we use the same free and open source software that is used to run Wikipedia. It's called MediaWiki (www.mediawiki.org). There are literally dozens of other wiki applications available. We like this one.
- **Online Community and Discussions:** we have started using an open source product called Elgg (www.elgg.org) recently. Essentially it is an open source Social Networking software, which allows you to create your own private Facebook & Twitter. We have started to deploy it with a number of geographically dispersed organizations to allow them to have a private online conversation that builds their cohesiveness and collaboration as a group.

We also use Drupal (www.drupal.org) for the similar reasons, but Drupal has a lot more functionality available to it. In fact, Drupal is our go-to software for almost all our clients' needs.

Traceability and Accountability

- **Time Tracking & Reporting:** we track all of our time in an online application called Web2Project (www.web2project.net) . We create tasks, assign them to each other, log our time against the tasks we are given and run reports at the end of the month to send to our clients. Increasingly our clients are joining us in this community and creating tasks for us directly, and checking on our progress. We also export the time we log in this system so that we can run our monthly billing cycle from it.
- **Publishing our Work:** we also publish our work in our own website and in the sites & forums for the various projects we are involved with and contribute to (e.g. Drupal, SugarCRM, Formulize). We use Drupal as our Content Management System, but we also use Formulize (www.freeformsolutions.ca/en/formulize) extensively both on our own site and on behalf of our clients. Formulize is an open source product that one of my colleagues created, and any work that we do to that product to meet the requirements of individual clients is published and available to anyone. We call this approach the Development Commons. You can read more about this on our website.

This is just a small sampling of the tools we use and an even smaller sample of the tools available. The best guide to finding the right software is to assume that someone else had this problem before you and has been generous enough to share their solution. So just search for it online and see what you find.

Alternatives

None of the software that I have mentioned is alone in their approach to solving problems. There is a rich eco-system of competing and collaborating open source products that you can discover for yourselves. We list all the ones we like, and many of the ones that didn't quite work for us, on our site, but it is a tiny fraction of all of those available.

One of the common features with many of the applications I have mentioned is the need to have a server to host them. i.e. a computer that is permanently connected to the internet, that is safe and secure, and that is powerful enough so that several people can use it concurrently. It is relatively cheap to get server space. We offer hosting packages for as little as \$30 per month, but there are huge big-box equivalent organizations offering hosting packages for as little as \$5. To use the latter though, you do have to know a little bit about what you are doing.

But if neither of these are quite cheap enough, and free is the only option then there is still one route available. The free option is sometimes the most comfortable way to start out as it allows you to experiment with how you might work and what you might need and use without making any commitment. In this case, Google offer a large suite of free tools including email, chat, document editing & sharing, calendaring, web page creation and more. If you want to play with these tools, just sign up for a Google Account at google.com – click on the Sign In link.

Alternatively, if you want to play with them at an organization-wide basis, you can sign up for a free Google Apps for Your Domain account (<http://www.google.com/a>). In this case you just need to own your own domain name or website address (usually about \$10 per annum) and then you can use all the Google tools for free. The advantage of this approach is that (for example) emails come from an @myorg.ca address rather than an @gmail.com address. In other words it adds a professional veneer to your organization at a very low cost!

Finding Volunteers

So once you have figured out what you need to do, what work you can distribute to volunteers, and what tools you will be using to facilitate their contribution, how do you find the volunteers.

There are all the usual ways to find volunteers, that you all probably know more about than I do. There are also a growing number of online resources for advertising your needs to a wider audience.

- Volunteer Ottawa: www.volunteerottawa.ca/vo-clean/ will publish your request for volunteers and try to match you with suitable candidates.
- MatchIT.ca: www.matchit.ca is an initiative by Microsoft Canada and Imagine Canada to pair technically-oriented volunteers with organizations that need them.
- Volunteer Match: www.volunteermatch.org is mostly US-oriented in terms of hands-on volunteering, but several Canadian organizations advertise there for virtual volunteers
- UN Volunteers: if your organization is involved in international development or seeking to meet the Millennium Development Goals, then the www.onlinevolunteering.org site will allow you to publish your volunteer requests.
- And of course your own website! What? You haven't got one? Well why not get a volunteer to do it for you!

Whats next

- Visit our site! You will find a PDF version of this document published at www.freeformsolutions.ca/Virtual.Volunteering.pdf) so you don't have to re-type all the links! There is also a lot more about how we work at www.freeformsolutions.ca/en/how_we_do_it
- Read: have a look at some of the resources available online and share them with your colleagues
- Brainstorm: think about what needs to be done and see if you can think of ways that a virtual volunteer could meaningfully contribute.
- Play: experiment with the tools available - there is so much that can be done for no cost or next to no cost, and even the server-based softwares have demo versions that you can sign into and evaluate (e.g. the demo for CiviCRM is at <http://drupal.demo.civicrm.org/>)
- Repeat as necessary! the software and opensource and internet eco-systems change daily and the ways that volunteers want to contribute changes with them. So the more often you can repeat these steps, the wider the net you can cast for volunteers and the richer your relationship with them will be.