



# Service Enterprise & Libraries

*Is it for your library?*

**BOULDER**  
PUBLIC LIBRARY

CEDAR  
RAPIDS  
PUBLIC **Library**

**JOHNSON COUNTY**  
KANSAS  
Library



# Who the heck are we?



**Amber Bourek Slater**  
Volunteer Services Coordinator  
Johnson County Library  
*Kansas*

- Going through Certification



**Jessica Link**  
Volunteer Coordinator  
Cedar Rapids Public Library  
*Iowa*

- Certified in 2015
- Recertified in 2021



**Kate Kelsch**  
Volunteer Services Coordinator  
City of Boulder Library & Arts  
*Colorado*

- Certified in 2018
- Recertified in 2021



# Today's discussion...

- What is Service Enterprise
  - Overview
  - Characteristics
  - Process
- Our experiences
  - The who, what, where, when, why, how
- Benefits
- Challenges



# How familiar are you with Service Enterprise?

- I have never heard of it.
- I have heard a little bit about it.
- I am very familiar with it and am considering the certification process.
- My organization is in the process of applying for certification.
- My organization is already certified.



# What is Service Enterprise?

<https://www.pointsoflight.org/service-enterprise-program/>



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## ABOUT THE PROGRAM

POINTS OF LIGHT'S SERVICE ENTERPRISE PROGRAM STRENGTHENS NONPROFIT CAPACITY THROUGH THE FUNDAMENTAL AND STRATEGIC USE OF VOLUNTEERS AND THEIR SKILLS TO ADDRESS COMMUNITY NEEDS.

## WHAT IS A SERVICE ENTERPRISE?

A Service Enterprise is an organization that strategically leverages volunteers to achieve operational efficiency and greater social impact. Service Enterprises are among the top 11 percent of nonprofits in the country in volunteer management and organizational performance. Research conducted by TCC Group and Deloitte shows that nonprofits operating as a Service Enterprise are as effective as peers but at almost half the median budget, and they are significantly more adaptable, sustainable and scalable. Become a leader in capacity building and engagement by becoming a certified Service Enterprise or Service Enterprise Hub.

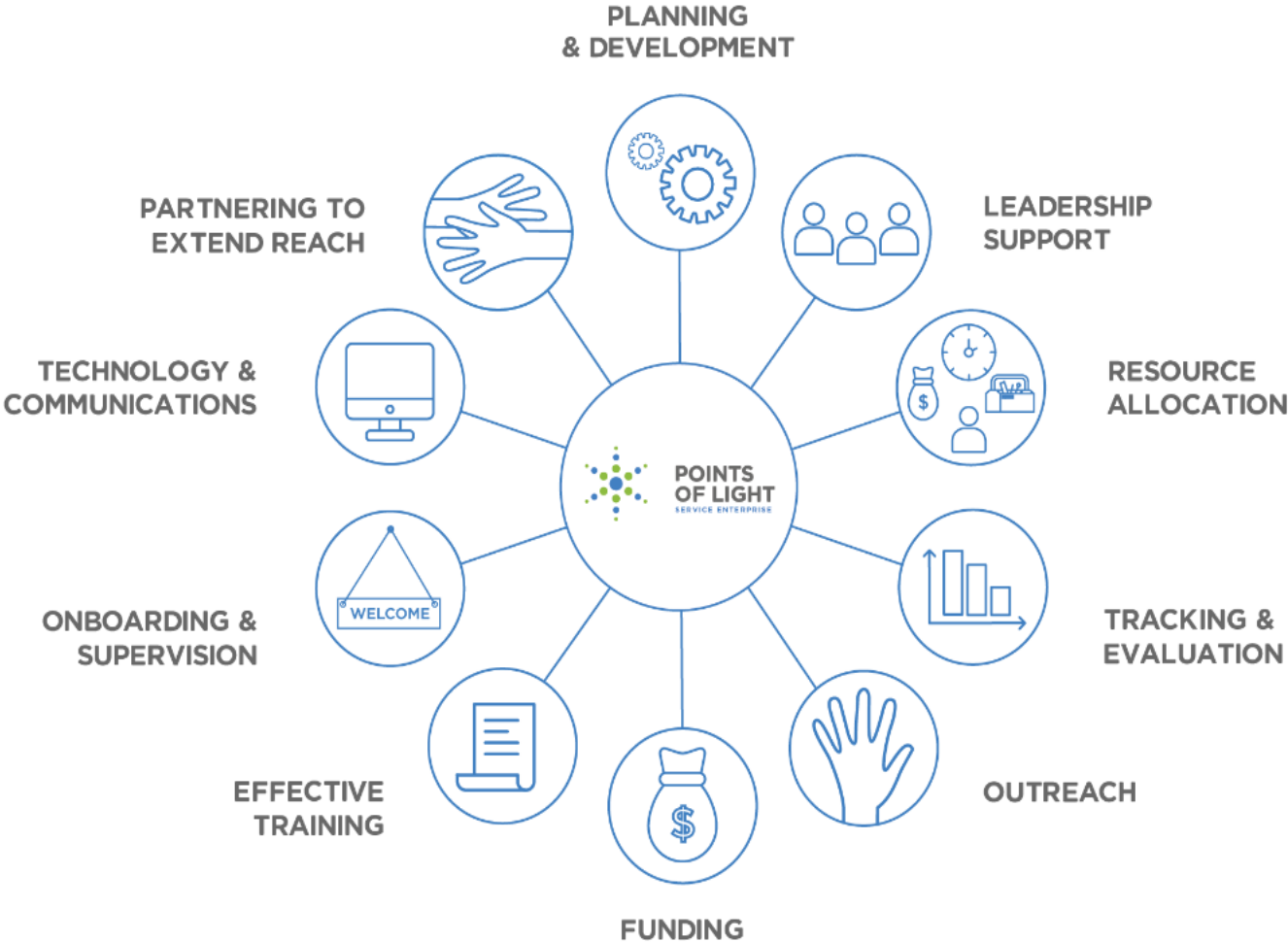



# Service Enterprise Orgs Are:

- Among the **top 11% of all nonprofits in the country** in volunteer management and organization performance
- Have proven to be stronger organizations through **connecting at a deeper level with the communities** they serve
- **Better led and managed** organizations; More **adaptable, sustainable and capable of going to scale**
- Are as equally as effective as their peers without volunteers, but at **almost half the median budget**
- For every dollar invested, organizations who are operating as a Service Enterprise are **able to achieve 3 times the ROI**



# Service Enterprise Characteristics





# Which characteristic would be easier for you to demonstrate?

***\*\*Write your answer in the chat.\*\****

- Planning and Development
- Leadership Support
- Resource Allocation
- Tracking & Evaluation
- Outreach
- Funding
- Effective Training
- Onboarding & Supervision
- Technology & Communication
- Partnering to Extend Reach







# Which characteristic would be difficult for you to demonstrate?

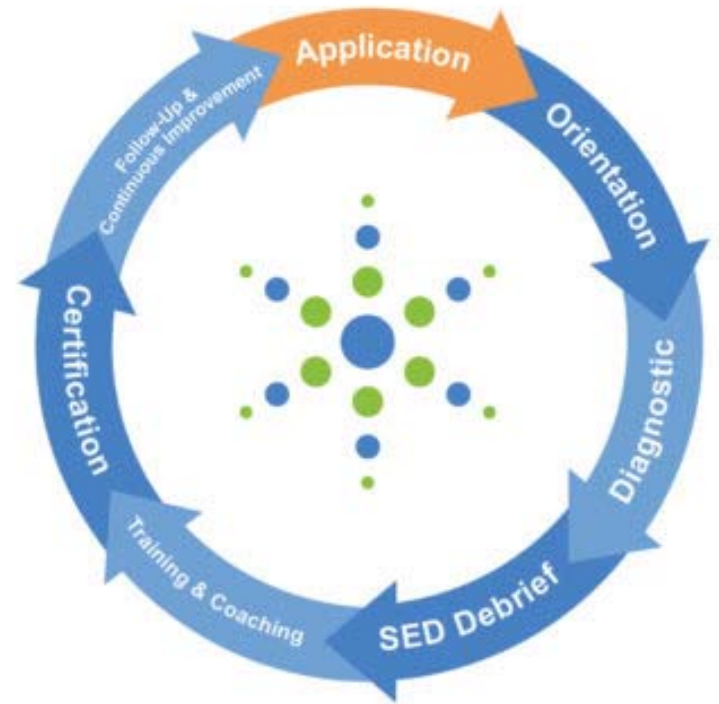
***\*\*Write your answer in the chat.\*\****

- Planning and Development
- Leadership Support
- Resource Allocation
- Tracking & Evaluation
- Outreach
- Funding
- Effective Training
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# The process

- Application
- Orientation
- Diagnostic
- SED Debrief
- Training & Coaching
- Certification
- Follow Up & Continuous Improvement (*Recertification*)





How has this worked at our libraries?

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# BOULDER PUBLIC LIBRARY

- Who – City led
- What – union staff; 5 facility library
- Where – certified and recertified
- When – started 1.5 years after forming our citywide volunteer cooperative; recertification during the pandemic
- Why – opportunity to raise the profile of volunteer work, professionalize, engage leadership
- How- cross departmental volunteer coordinators/team



## SE Success #1: Leadership Support: Guiding Coalition

Sincerely,  
The Volunteer Cooperative's  
Guiding Coalition



**Greg Testa**  
Chief of Police



**Michael Calderazzo**  
Fire Chief



**Yvette Bowden**  
Director of Parks and Recreation



**David Farnan**  
Library and Arts Director



**Tracy Winfree**  
Director of OSMP



**Jim Creese**  
Assistant Director of Information Technology



**Tanya Ange**  
Deputy City Manager

## SE Success #2: Full Team and Core Teams





### SE Success #3: Strategic Plan

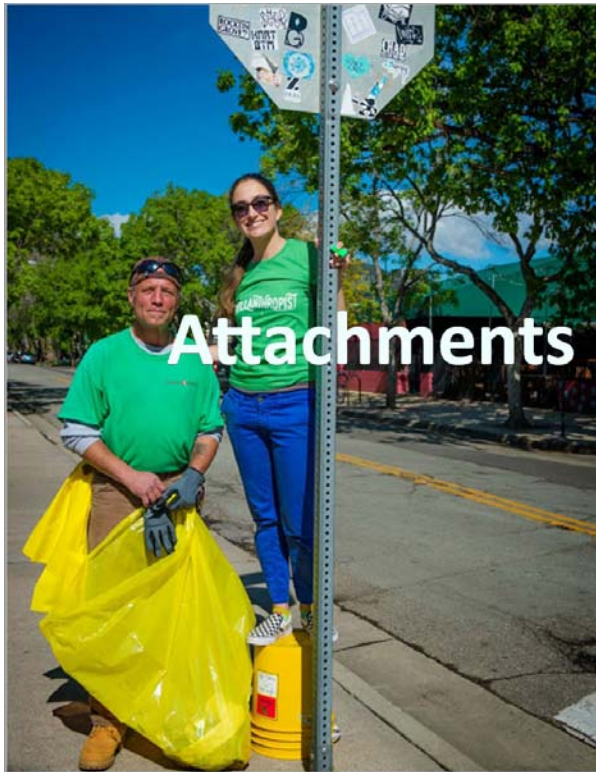


**Our Mission** is to create a community of service.

And **our Vision** is to create a integrated network of resources and opportunities to increase community stewardship.



# Informs Annual Volunteer Cooperative Work Plan



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## Work Plan

Attachment C

Goal	SED	Action	Year	When
1.1a		Offer paid DOVIA memberships to all interested Volunteer Cooperative members	2017	Q3
1.1a		Additional recruitment of Volunteer Cooperative members from organizational departments	2017	Q4
1.1a		Host Volunteer Cooperative full-team quarterly meetings and subcommittee meetings	2017	Q1-ongoing
1.1a	3.1	Offer on-going support to employees who work with volunteers through continued leadership support of Volunteer Cooperative	2017	Q4
1.1a		Bi-annual review and update of three-year Volunteer Cooperative Strategic Plan in alignment with citywide initiatives and priorities	2018	Q2 (ongoing)
1.1a	6.10-6.12	Create service standards for communicating and responding to interested volunteers, and follow up with prospective volunteers in alignment with customer experience principles	2017	Q4
1.1b		Draft Request for Proposals for Volunteer Management System	2017	Q3
1.1b		Review proposals for Volunteer Management System with Volunteer Cooperative team and appropriate city staff	2018	Q2
1.1b		Select vendor or system	2018	Q3-Q4
1.1b		Implement Volunteer Management System, including training staff and volunteers on utilization	2018	Q3-Q4
1.1b		Seek funding opportunities – cross-departmental funds, grants, other	2017	Q4
1.1c		Develop and maintain intranet site for internal coordination among city staff and volunteers	2017	Q2
1.1c		Develop a communication plan for initial and ongoing communication with staff and stakeholders	2017	Q4
1.1c	4.5 & 4.6 & 6.8	Share relevant and consistent information through standardized methods (social media, emails, press releases) with volunteers and community at large for recruitment; engage volunteers as advocates and promoters on social media	2018	Q1
1.1c		Create shared contact list of volunteers for mass email, texting of City Volunteers	2018	Q4
1.1d	1.2	Provide recommended language for inclusion of volunteerism in master plans and strategic plans	2017	Q4
1.1d		Provide exit interview instructions and survey for volunteers on intranet site	2017-2018	Q4 2017-Q1 2018
1.1d	3.2	Incorporate volunteer management into existing applicable staff trainings, including New Employee Orientation	2018	Q2
1.1d		Provide exit interview instructions and survey for volunteers on intranet site	2018	Q1
1.1d	1.13 & 5.5 & 5.6	Standardize form templates, including volunteer application, risk and release forms, background checks and volunteer position description template	2018	Q1
1.1d	3.7 & 5.9	Create volunteer policies and accompanying volunteer handbook to be posted on intranet and distributed to all volunteers	2018	Q1-Q3
1.1d		Provide sample marketing materials, recruitment language, interview questions and selection criteria	2018	Q2
1.1d		Create process and system for utilization organizationally of court ordered volunteers	2018	Q3
1.1d	8.6 & 8.7	Create instructions for formal grievance and termination procedures in place for volunteer supervisors included in Volunteer Handbook and available in the online supervisor toolkit	2018	Q4
1.1d		Provide online instructional video for supervising volunteers	2018	Q4
1.1d		Systematize Return on Volunteer Investment (ROVI) tool for determining financial impact of volunteer program	2019	Q1
1.1d	1.3	Implement a tool for conducting needs assessments for volunteer service opportunities	2019	Q1
1.1e	9.1 & 9.2	Identify and reach out to municipalities, businesses and professional networks with similar vision and values to support volunteer efforts	2017	Q1
1.1e		Partner with organizations on communitywide projects to recruit, support and promote initiatives (e.g., Community Clean Up Day, etc.)	2018	Q1
1.1e		Be clear about the ask, expectations and outcomes by creating Memorandums of Understanding with partnering with external organizations	2019	Q1
1.1f	6.3	Promote volunteer opportunities on single-source website, including volunteer success stories and information about the city's commitment to volunteerism through the Volunteer Cooperative	2017	Q2
1.1f	2.10	Prepare ongoing updates and press releases about volunteer successes for newsletters, website and internal communication	2017	Q3



# Goals, Success Outcomes, Metrics and Measurements



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## Metrics

Goal	Success Outcomes	How Outcomes Will Be Measured
1. Create an integrated network of resources to increase volunteer program efficiencies.	Staff and departments interested in working with volunteers have access to tools, guidelines, processes and plans needed to facilitate successful volunteer programs and projects.	Analysis of process improvements and efficiencies, compilation of volunteer and staff surveys.
2. Utilize volunteers to increase organizational capacity.	The city offers a more diverse array of easy-to-use processes and tools to engage community volunteers in department priorities and operations.	Survey of city staff working with volunteers that indicates the same or more work is completed without increased staff time or resources.
3. Improve the volunteers' customer experience in order to enhance community engagement and stewardship.	The city achieves a high level of volunteer customer experience around volunteer programs, projects and engagement.	Survey of volunteers indicate increased retention rates and interest in volunteer programs and projects.
4. Communicate with and mobilize volunteer community for disaster response and recovery.	The city is better able to utilize trained community volunteers in disaster preparation, response and recovery.	Survey of city staff and volunteers about their comfort level in feeling prepared to assist with disaster response and recovery and tracking of how many volunteers helped and their impact during and after an event.
5. Evaluate, celebrate, and communicate volunteer impact.	All city volunteers feel their contribution is valued and staff understand the impact of volunteerism.	Annual impact reports and volunteer acknowledgement in city wide publications.

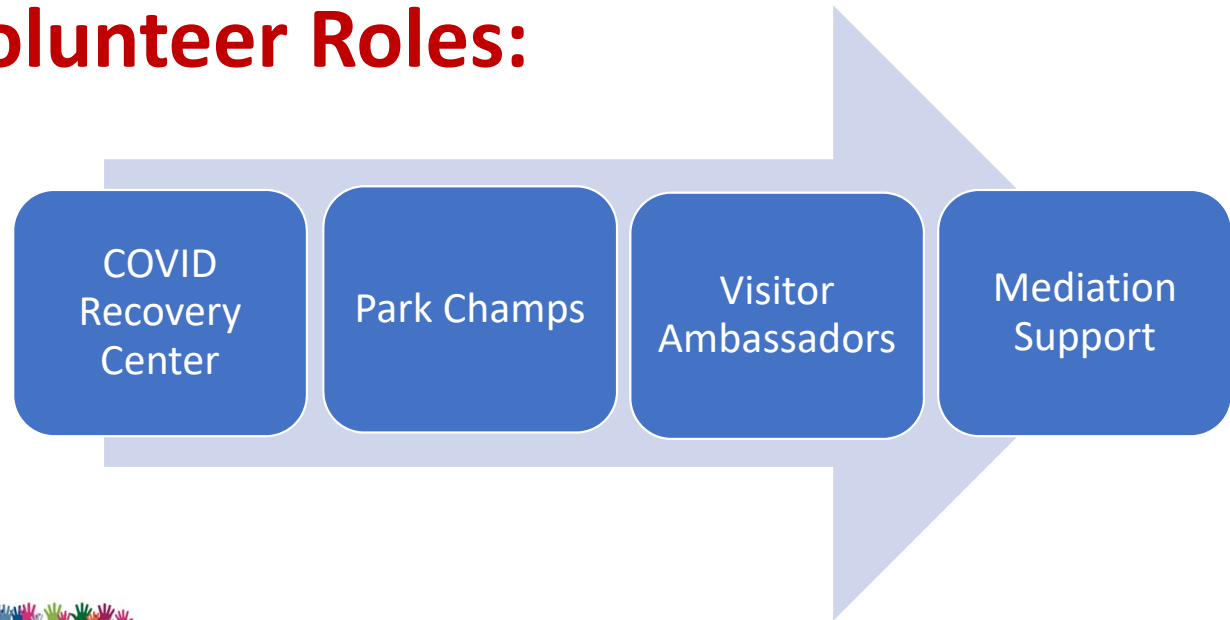




## SE Success #4:

# Putting Service Enterprise into practice during COVID

## Volunteer Roles:





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- Who – led by Volunteer Coordinator
- What – unionized staff; two facility library
- Where – certified and recertified
- When – started less than 1 year after began working with volunteers; started recertification before the pandemic
- Why – opportunity to educate leadership and build support for new volunteer engagement initiatives
- How – first cohort for local hub; free opportunity



# Year One

<b>The Starting Point</b>	<b>The Ending Point</b>
“Is it right for the library to use volunteers? We can pretty much do it all by ourselves. Sure, a little help would be okay...”	“Oh no! Our volunteer Holds Hunter won’t be here today! What are we going to do? How will we get this done? Can we get another volunteer to help us?”
Questioning its place and how the development of a program affects the people and systems already in place.	This is a vital part of our organization.



# Year Two

<b>The Starting Point</b>	<b>The Ending Point: GOAL</b>
The volunteer program is primarily one person's concern.	This is the library's program and takes the investment of all staff.
This is how we <u>operate</u> with volunteers.	This is how we <u>strategically</u> dream bigger and accomplish more by leveraging volunteers and their skills.



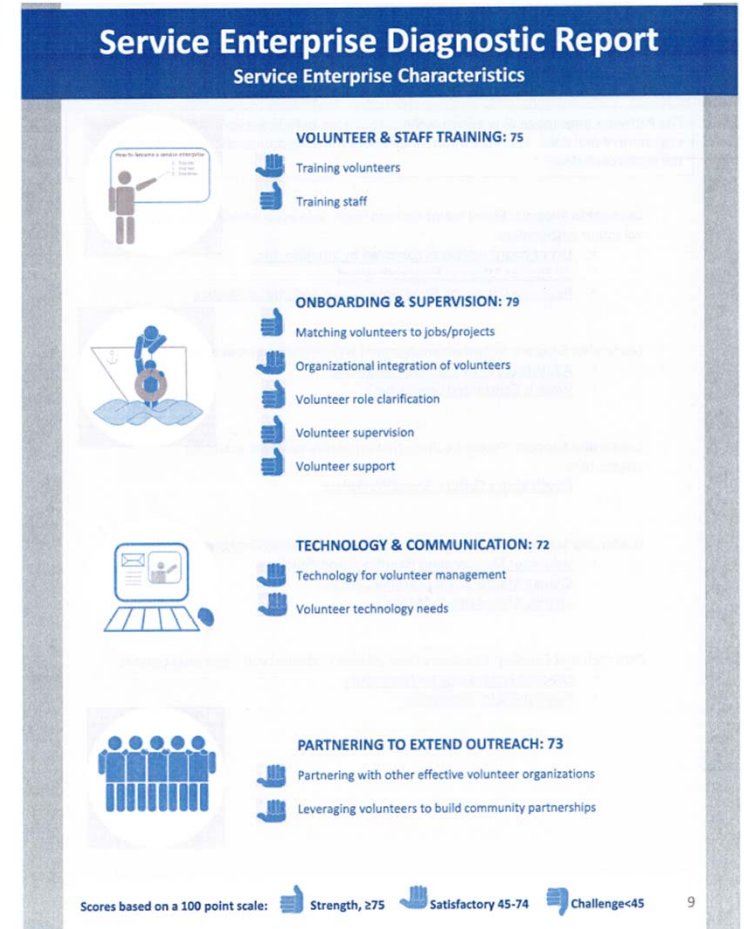
# Service Enterprise Diagnostic Report

## Service Enterprise Characteristics Overview



Scores are based on a 100 point scale. Scores below 45 represent challenges, between 45 and 75 are satisfactory, and scores above 75 represent strengths.

69	<b>LEADERSHIP SUPPORT:</b> Buy-in, planning, communication, inspiration for building a strong Service Enterprise	75	<b>VOLUNTEER &amp; STAFF TRAINING:</b> Effective training of volunteers for their positions and staff for managing and engaging them
70	<b>RESOURCE ALLOCATION:</b> Allocation of resources (time, money, tools) to the management of volunteers to support program delivery, operations and collective action in the community	79	<b>ONBOARDING &amp; SUPERVISION:</b> matching volunteers to the positions, role clarification, and integration of volunteers into the whole organizational culture
67	<b>TRACKING &amp; EVALUATION:</b> Determining market value, monitoring output, assessing quality of volunteer experience and evaluating volunteer program(s)	72	<b>TECHNOLOGY &amp; COMMUNICATION:</b> Your nonprofit and its volunteers have the right communication technology
73	<b>OUTREACH &amp; FUNDING:</b> Identifying and recruiting volunteers, and fundraising for volunteer management	73	<b>PARTNERING TO EXTEND OUTREACH:</b> Expanding the reach of volunteers through the creation of community partnerships.

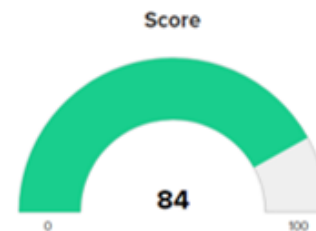




# Service Enterprise Diagnostic Debrief Notes

Report Prepared for  
Cedar Rapids Public Library

## Service Enterprise Score



Your score of 84 out of 100 was generated based on how well your organization is doing across a set of volunteer engagement best practices. Based on the preliminary information you supplied in the survey, your organization appears to be a Service Enterprise.

### Current Strengths

- Volunteers reflect clients
- CRPL volunteer engagement efforts creates advocates throughout the community.
- Leveraging volunteers allows staff to do meaningful work.



## Service Enterprise Characteristics



### Characteristic 1: Planning and Development

Developing a strategy and infrastructure for mission driven volunteer engagement

✓ 82

#### Recommendations for Improvement in Planning and Development

1. Ensure volunteers understand to whom they report
2. Incorporate volunteers into your organizational chart
3. Add volunteer supervision to staff job descriptions whenever appropriate

#### Notes

- + Supervisory team works with volunteers and manage programs.
- + Managing/engaging volunteers in all position descriptions.
- + Mission alignment in all that we do.
- + Actual staffing for volunteer engagement.
- △ Further integration: connected with multiple people = more sustainable
  - Empower additional staff and volunteer leaders
  - Offer human capital supervision as professional development opportunity for staff/volunteers.



### Characteristic 2: Leadership Support

Demonstrated executive commitment to volunteer engagement

✓ 83

#### Recommendations for Improvement in Leadership Support

1. Recognize work with volunteers in performance evaluations
2. Reward employees who effectively engage volunteers; Consider merit raises and supervisory classifications
3. Develop contests for who can most effectively engage volunteers

#### Notes

- + Board is engaged in special events, regular, and ongoing roles.
- △+ Board ... how can we share/ask more of them?
- △ Recognize the volunteer engagement efforts of staff during performance evaluations
- + Board very appreciative of volunteer efforts.
- △+ Union Leadership
  - + Sharing message
  - + Union on board with Strategic Volunteer Engagement
  - △ Candid conversations and results driven





# Transformation & Action Plan Working Document & Accountability Tracker

Characteristic(s)	Action Item	Action Leader	Action Contributors	Target Date
Leadership Support	Develop regular reporting on volunteer value/impact for library Board of Trustees.	Jessica L.	<ul style="list-style-type: none"> <li>Amber M.</li> <li>Dara S.</li> <li>Lindsey T.B.</li> <li>VPAC</li> </ul>	7/2014
<p><b>Details:</b> Monthly dashboard report to highlight volunteer participation, hours, value, and brief narrative.</p> <p>Add volunteer statistics to annual report. <b>Completed 8/2014</b></p> <p><b>Update:</b> Leadership changes put a temporary hold on this action item.</p>				
Leadership Support	Volunteer Coordinator added to the weekly Management Team Meetings to provide strategic volunteer engagement at conceptual and tactical levels.	Bob P.	<ul style="list-style-type: none"> <li>Management Team</li> <li>Jessica L.</li> </ul>	3/2014
<p><b>Update:</b> <b>Completed 3/5/2014</b></p>				
Resource Allocation	Hire PT clerical staff person to assist Volunteer Services.	Jessica L.	<ul style="list-style-type: none"> <li>Bob P.</li> <li>Jessica M.</li> <li>Amber M.</li> <li>City HR</li> </ul>	5/2014
<p><b>Details:</b> New PT staff member will provide clerical assistance to improve data management, volunteer application process, communications, and day-to-day volunteer support. PT staff will report to Volunteer Coordinator. Must be approved and coordinated through City of CR HR department.</p> <p><b>Update:</b> Job description at City HR for review and classification. (2/28/14) <b>Completed 6/2/2014</b></p>				



## Service Enterprise Maintain Certification Action Plan

<b>Your Organization Name</b>		Cedar Rapids Public Library											
<b>Your Mission and Vision</b>		Mission: We connect people to information, experiences, and services that enhance their quality of life so our community can learn, enjoy, and thrive. Vision: We are a beacon of literacy to all who seek knowledge and understanding. We are compassionate navigators to the information, resources, and entertainment you seek. We are your library.											
<b>Your Service Enterprise Vision</b>		The CRPL Volunteer Program's vision is a collaborative environment in which community members work with Library professionals to provide an outstanding Library experience.											
<b>Your Guiding Coalition members</b>		Dara Schmidt, Library Director; Amber McNamara, Community Relations Manager; Jessica Link, Library Volunteer Supervisor; Lindsey Tygart-Brown, Volunteer Program Administrative Assistant; Todd Simonson, Public Services Manager; Natalie Struecker, Downtown Branch Manager; Stephanie Hall, Ladd Branch Manager; Mary Beth McGuire, Programming Specialist; Sidney Christiansen, Patron Support Specialist; Hassan Selim, Board Member/Volunteer; Harriet Kalinsky, Board Member/Volunteer											
<p style="color: orange;">Instructions: Fill out the rows below for action items related to each characteristic and the applicable standard. Use Column B to indicate the green, yellow or red status of the item. To add more rows, either copy or insert a row. The Standards (Column D) will auto-insert based on the selected CS# (Column B). Please ensure you copy down the formula for this function to work.</p>													
Characteristics	CS#	GYR	Standards <small>Note: Copy formula for auto-lookup of description</small>	Current Practice or Action Step	Lead/ Support	Resources	Start	End	Status	Frequency for ongoing action items how often is it scheduled? e.g. monthly	Evidence or proof provided	What were the results of this action step? What changed?	Standard Met?
PLANNING & DEVELOPMENT*	PD1	Y	Organization creates volunteer service placements based on strategic goals.	Conduct needs assessment survey, interviews with leadership team, a management discussion on returning roles, new roles, and long-term strategic goals for the Library	Jessica and Lindsey/Amber, Dara, leadership team	Survey Monkey, dedicated staff time from all levels of leadership	10/12/20	11/25/20	Ongoing	As needed	Needs assessment survey instrument with results data, notes from interviews, position assignments for new roles, updated position descriptions or trainings for returning roles	While certain steps of this have been completed (needs assessment, leadership interviews, management meetings, and the development of a few new roles), other pieces of this standard remain in progress as the Library continues to evaluate its reopening procedures and reassess its strategic goals. <b>This work will continue as we move forward as a Service Enterprise.</b>  Leadership team was open to sharing opportunities and concerns regarding returning volunteers. Management team engaged with volunteers as a resource to consider when developing initiatives to meet strategic goals.	Yes
PLANNING & DEVELOPMENT*	PD4	Y	Organization creates new volunteer opportunities as necessary.	Launched new role for Closed Captioning	Jessica and Lindsey/Kevin, Amber, AmeriCorps member, work/study volunteer	Amara, YouTube, GoogleSites, volunteer time	9/17/20	1/25/21	Complete		Data on volunteer hours, documentation of training, Amara software, YouTube videos with closed captioning	Increased accessibility of virtual Library programs - meets one of the Library's strategic goals. Developed new role for remote volunteers including increased potential for diverse volunteers, volunteers in need of flexible schedules, work/study volunteers, and volunteers outside of geographic area.	Yes
EFFECTIVE TRAINING*	ET1	Y	Organization trains paid staff on how to work with volunteers.	Record current New Volunteer Orientation and make training available to staff in Niche Academy	Jessica/Lindsey, Leadership team	Video editing software, Niche Academy, Leadership support, staff time for training	4/15/20	4/1/21	Post-SE		Recording available on Niche Academy, tracking of staff completion	By 4/1/21, the New Volunteer Orientation will be accessible to staff on Niche Academy. This will increase transparency regarding onboarding new volunteers, align expectations for volunteers and staff, and demonstrate the high level of training and professional welcome volunteers get upon joining the Library. <b>DONE, 10/1/2021</b>	Yes
EFFECTIVE TRAINING*	ET2	G	Organization offers volunteers ongoing and/or task-specific training.	Developed online training for volunteers including COVID-19 safety, changes to specific roles due to safety, and training for new Programming Crafts/Kits Preparation role	Jessica and Lindsey/Jill, Programming staff, Aaron, Todd, Amber, Kevin	Niche Academy, video editing software, volunteer time to complete training	6/1/20	9/10/20	Complete		Trainings available on Niche Academy, tracking of volunteer completion	Volunteers felt prepared to safely return to their on-site roles during the pandemic. Increased accessibility of training while ensuring accountability.	Yes



# JOHNSON COUNTY KANSAS

## Library

- Who – led by Volunteer Coordinator
- What – County employed staffed; 14 branches + Friends & Foundation
- Where – currently going through certification; in action plan stage
- When – started 2021
- Why – Decrease in usage of volunteers and wanted to build leadership and staff support to engage volunteers in new ways
- How – second cohort for local hub; free opportunity



# Planning for the Future





# Planning for the Future



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# Action Plan Overview

- Volunteers & JCL Communication Plan
  - Share volunteer success stories with staff, board, & County
- Volunteer Handbook
- Annual volunteer evaluation
- DEI in volunteer program
- Work with Learning & Development on training & orientation opportunities





# Benefits

- Gets the right people in the room
- Creates sense of urgency
- Elevates professionalism of volunteer engagement
- Managing strategic resources
- Opportunity to involve leadership and staff across the organization
- Creates environment/network for success and for “the unknown opportunities of the future” – the know-how to do the work – team functionality





# Challenges

- Time commitment
- Leadership buy-in
- Cost – certification, recertification
- Staff turnover – management and volunteer engagement leader



# Final Thoughts

- Consider the timing and the experience of the team before you opt in
- Think critically about who you want on the team as leaders in the organization – both formal and informal leaders
- Set expectations with the team – not volunteer management training, who are the decision makers, visionary/structural level discussion not logistics
- Feel free to contact any of us to learn more!



## For those new to Service Enterprise, what is your impression?

- 0 – This does not sound like something that would work for us.
- 1 – Sounds interesting, but I don't think my organization would support it.
- 2 – I wish we could have the time for this, but we can't take it on now ...but maybe someday.
- 3 – I'm interested in learning more and seeing if leadership would support this.
- 4 – We are interested, and it is time to digger deeper.





# Questions

