AGAPE CARES VOLUNTEER INITIATIVE: INCREASING ENGAGEMENT AND CAPACITY

AGAPE CARES FOUNDATION

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Project Description:

Agape Cares is a nonprofit organization dedicated to providing compassionate care and support to individuals facing life's challenges, including grief, hospitalization, illness, injury, or recent childbirth. Our dedicated volunteers offer up to two weeks of assistance to members, providing essential services such as transportation, meal preparation, housekeeping, and companionship.

Founded by Clarice Mitchell, Agape Cares is governed by a board of five members. Additionally, Kelsey Lee is the Executive Assistant who is the only paid staff member who does administrative work in the office and is responsible for speaking with members to assess their needs. Omni Butler is the Grant Manager who is responsible for grant research and writing and Nancy Hernandez is the volunteer coordinator who is responsible for scheduling appropriate volunteer support. The grant manager and volunteer coordinator are an unpaid position and they only volunteer 2 days a week.

Recently, the organization received a significant grant of half a million dollars to expand its services. Despite a growing membership of 65 individuals, we currently face a critical shortage of volunteers. Unfortunately, due to this shortage, we are often unable to fulfill our members' requests for assistance. Our existing volunteers are feeling overwhelmed and exhausted due to the heavy workload. Several current and former volunteers have raised concerns about the organization's scheduling practices and the excessive workload they have experienced. Nancy would love to contribute more, but her part-time job limits her availability during the day. Nancy has proposed to the Board President that the organization implement a volunteer data system to streamline the tracking of members, volunteers, and service requests. She currently relies on an excel spreadsheet to manage this information.

To address these challenges, our planning team has been tasked with developing a comprehensive strategy to organize and reorganize our structure and increase volunteer engagement. This may include exploring the possibility of hiring paid staff to supplement our volunteer workforce and purchasing a volunteer database system with the additional funding we have received.

Scope Statement:

Project Title: Agape Cares Volunteer Initiative: Increasing Engagement and Capacity   Date: September 30, 2024   Prepared by: Nikki Hardin
Project Justification: Agape Cares is experiencing a significant volunteer shortage that is hindering its ability to provide essential care and support to members in need. The lack of volunteers is leading to increased workload for existing volunteers, burnout, and an inability to meet the growing demand for services. Our goal is to enhance Agape Cares' capacity to provide compassionate care and support to members by addressing volunteer shortages, improving scheduling practices, and potentially expanding the organization's structure.
Product Characteristics and Requirements: 1. Cost no more the $500,000   2. User friendly volunteer database system   3. Develop effective recruitment channels (e.g., social media, community partnerships)   4. Evaluate the need for paid staff
Product User Acceptance Criteria: 1. The system can effectively schedule volunteers to tasks based on their availability and skills   2. Members can submit service requests and track their status.   3. Web based for easy access for staff, volunteers and members
Summary of Project Deliverables: **Project Management related deliverables:** scope statement, stakeholder analysis, business case, SWOT analysis, WBS, cost breakdown, critical path, communication plan, risk management plan   **Product related deliverables:**   1. Development plan (timeline)   2. Testing plan (to ensure it meets requirements)   3. Training manual and materials   4. Increased volunteer engagement

Stakeholder Analysis

Name	Level of Interest	Level of Influence	Potential Management Strategies
Clarice Mitchell, Founder & Executive Director	High	High	Clarice is the founder and executive director who is responsible for the overall leadership and management of the organization. She developed and implemented the organization's strategic plan, ensuring that it aligns with the mission and vision. She is able to advocate for the organization's mission and the needs of its members throughout the community.
Sydney Mercer, Project Manager	Moderate	Moderate	Sydney has 25 plus years experience in planning, organizing, and overseeing projects to ensure they are completed on time and within budget. He is a strategic leader and very knowledgeable of Agape Cares' mission and needs. He has professional experience as a mediator therefore he is skilled at resolving conflict.
Kelcy Lee, Executive Assistant	High	Moderate	Kelcy has 5 years experience supporting the executive director in carrying out their duties and providing general office support, such as answering phones and responding to emails from members. She also assists with special projects and coordinates meetings and events. She has excellent organizational and time management skills that gives her the ability to prioritize tasks, manage multiple deadlines, and work efficiently. Kelcy works closely with Nancy Hernandez.
Omni Butler, Grant Manager	High	Moderate	Omni has 15 years experience in writing and managing grants. He is responsible for identifying, researching, and securing grant funding to support the organization's programs and initiatives. His financial management skills allow him the ability to manage grant budgets and track expenses.He possesses a strong knowledge of the challenges and opportunities that non-profit organizations encounter.

Nancy Hernandez, Volunteer Coordinator	High	Moderate	Nancy is new to the organization; however she has 7 years experience recruiting, training, and managing volunteers. She matches volunteers with appropriate tasks based on their skills and availability as well as creates volunteer schedules. She has strong interpersonal skills that gives her the ability to build relationships with volunteers and members. Her problem-solving skills allow her to effectively address challenges and conflicts that may arise. Nancy works closely with Kelcey Lee.
Mike Avery, Board President	High	High	Mike is a retired Development Officer of a non-profit organization. He has over 30 years of experience in community engagement and fundraising. He is responsible for leading the board and ensuring that it fulfills its fiduciary duties to the organization. He has strong leadership skills that inspire others.
Blair Hardin, Board VP	Hight	High	Blair is a retired judge. She serves as the second-in-command to the Board President and is responsible for supporting the Board President in leading the board. She also supports the organization in fundraising and community engagement.
Koree Taylor, Board Treasurer	High	High	Koree is a retired CIO of a nursing home facility who is responsible for overseeing the financial health of the organization. She manages the budget and has a deep understanding of financial management and accounting principles. She upholds the highest ethical standards, ensuring financial transparency and accountability.
Myles Duncan, Board Member, Secretary	High	High	Myles is a current pastor who's responsible for ensuring that the board of directors operates effectively and efficiently. He takes and records minutes of board meetings and maintains accurate records. His strong organizational and time management skills allows him the ability to manage multiple tasks and deadlines. He pays great attention to detail and has a deep sense of empathy

			for the people we serve and their unique circumstances.
Patricia Moore, Board Member	High	High	Patricia is a RN at a local nursing home with 10 years experience. She understands the importance of providing compassionate care. Her perspective and experience in healthcare helps ensure that the organization is providing the highest quality care and support to its members.
Gary Stine, Board Member	High	High	Gary Stine is the Operations Manager of a Fortune 500 company who is skilled in streamlining processes. He has 13 years experience managing the day-to-day operations of a company including managing volunteers, scheduling appointments, and ensuring that the organization has adequate resources.

Business Case
October 1, 2024

Project Name: Agape Cares Volunteer Initiative: Increasing Engagement and Capacity

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1.0 Introduction / Background

Agape Cares is a nonprofit organization dedicated to providing compassionate care and support to individuals facing life's challenges. Founded by Clarice Mitchell, the organization has been serving its community for 2 years. Our mission is to offer essential services, such as transportation, meal preparation, housekeeping, and companionship, to members experiencing grief, hospitalization, illness, injury, or recent childbirth.

Agape Cares is currently governed by a board of seven members and operates with a small staff, including a volunteer coordinator, a grant manager, and an executive assistant. While we have a growing membership of 65 individuals, we are facing a significant shortage of volunteers, which is limiting our ability to meet the needs of all our members.

2.0 Business Objective

To address these challenges and expand our services, we have received a grant of half a million dollars. This funding will enable us to implement a comprehensive strategy to reorganize our structure, increase volunteer engagement, and potentially hire additional staff. One key area of focus is the development of a volunteer data system to streamline our operations and improve our ability to match volunteers with members' needs.

3.0 Current Situation and Problem /Opportunity Statement

Agape Cares is facing a significant volunteer shortage that is hindering its ability to provide essential care and support to members in need. Despite a growing membership, the organization is unable to fulfill all service requests due to the lack of volunteers. This shortage is leading to increased workload for existing volunteers, burnout, and decreased morale. Additionally, the organization's current operational processes and systems are inefficient, contributing to the challenges in meeting the growing demand for services.

4.0 Critical Assumptions and Constraints

We assume:

- The $500,000 grant will be sufficient to fully implement this project.
- A volunteer database system can help streamline various processes
- A volunteer database system can help the organization better manage the growing demand for services and ensure that members receive timely support.

- Paid staff can dedicate more time to recruiting volunteers
- Investing in paid staff can contribute to the long-term sustainability of the project

Constraints:

- While the $500,000 grant provides a significant amount of funding, it may still limit the scope of the project
- Limited staff capacity could hinder the project's progress.
- The volunteer system must be compatible with the organization's existing technology infrastructure and software

5.0 Analysis of Options and Recommendations

To initiate this project, we will form a project team of representatives from the board, staff, and volunteers. Our first step will be to conduct a thorough needs assessment to identify specific challenges and opportunities. This will involve gathering input from volunteers, staff, and board members through surveys and interviews**.** Next, we will research available volunteer database systems to select the best option for Agape Cares needs. We will also develop a staffing plan to determine the necessary number and types of additional staff needed to support the project. Finally, we will identify potential risks and challenges associated with the project and develop strategies to mitigate them.

6.0 Preliminary Project Requirements

These preliminary project requirements provide a foundation for the development and implementation of the volunteer data system at Agape Cares:

- The system should be easy to use for members, volunteers and staff
- Security measures in place to protect sensitive data
- Accessible on both desktop and mobile devices
- The system should facilitate the matching of volunteers to tasks based on their qualifications
- The system should efficiently organize and manage volunteer schedules
- Members should be able to submit online requests for assistance
- Volunteers should be able to view their schedules and accept or decline task assignments based on their availability

7.0 Budget Estimate and Financial Analysis

Category	Estimated cost
System Development	$25,000
Implementation and Training	$25,000
Hardware / Software	$25,000
Personnel Cost	$375,000 (over 3 years)
Unexpected Expenses	$30,000
Marketing Materials	$5,000
Volunteer Incentives	$5,000
	Total Budget: $490,000

Despite the substantial $500,000 grant, additional funding will be necessary to sustain the project's long-term to maintain paid personnel. The grant manager will actively pursue supplementary resources.

8.0 Schedule Estimate

Planning and Preparation 4-6 months
System Implementation and Training 2-3 months
Testing and Launch - 1-2 months

Total Estimated Timeline: 7-11 months

9.0 Potential Risk

- Unexpected expenses could impact the project's budget
- The grant funding may be reduced or terminated prematurely
- The project may experience delays due to unforeseen circumstances
- Volunteers may struggle to adapt to the new volunteer database system
- The nonprofit sector's lower salary structure could hinder the organization's ability to recruit qualified staff for the new positions

SWOT Analysis: Agape Cares Volunteer Initiative: Increasing Engagement and Capacity

Strengths (Internal)	Weaknesses (Internal)
- Provides supportive care to individuals facing life challenges - Led by a dedicated board team. - Services can be expanded to reach more people in need of help - Paid staff can dedicate more time and focus to specific tasks - Recent grant of half a million dollars demonstrates the organization's ability to secure funding - The system can make it easier for volunteers to view their schedules, request changes, and receive timely notifications about assignments.	- Relying on grants to fund salaries can be risky, as grants may not be renewed or may change - Some volunteers may resist the changes - The process of transferring data from the old excel spreadsheet to the new system may encounter issues - Nonprofit salaries are often lower than private sector jobs, making it hard to find people to fill these roles full-time
Opportunities (External)	**Threats (external)**
- May attract more volunteers by demonstrating its commitment to efficiency and continuous improvement - Increase in donor giving when organization is able to increase services - The volunteer database can track volunteer work, find their skills, and see how well programs work. This information can help write good grants that show the organization's success - Streamlined process encourage more volunteer engagement and increase the number of individuals who can receive services - Significantly reduce the number of members who are turned away for services	- A recession can lead to decreased donations and funding, jeopardizing the ability to cover the costs of hiring staff and implementing the new system - If not careful, the system may be vulnerable to data breaches, which could lead to the exposure of sensitive information about members - The volunteer database system may experience unexpected crashes or outages hindering the organization's ability to schedule volunteers - Implementing the new system and paying staff can increase operational costs, potentially straining the organization's limited budget

Work Breakdown Structure (WBS) for Agape Cares

1.0 Needs Assessment and Planning

1.1 Conduct a comprehensive needs assessment report

1.1.1 Review current operations (e.g. volunteers engagement and scheduling)

1.1.2 Interview and/or survey diverse group of members and volunteers to learn about their experiences and challenges

1.1.3 Develop strategic plan outlining goals and objectives

2.0 Identify Project Phases

2.1 New Volunteer Database System Implementation

2.1.1 Research and choose volunteer database system

2.1.2 Develop procedures for data entry, tracking and reporting

2.1.3 Train staff and volunteers to use new system

2.2 Volunteer Recruitment

2.2.1 Develop volunteer recruitment plan and strategy

2.2.2 Implement strategy on how to retain current volunteers

2.2.3 Develop a plan to improve volunteer experiences

2.3 Develop Scheduling Process

2.3.1 Analyze current scheduling practices

2.3.2 Develop a more efficient scheduling system that connects members needs with volunteer availability

2.3.3 Train users on the new scheduling system

2.4 Evaluate Staffing Needs

2.4.1 Assess the need for full time paid staff

2.4.2 Create job description and roles for positions

2.4.3 Implement plan to staff additional paid employees

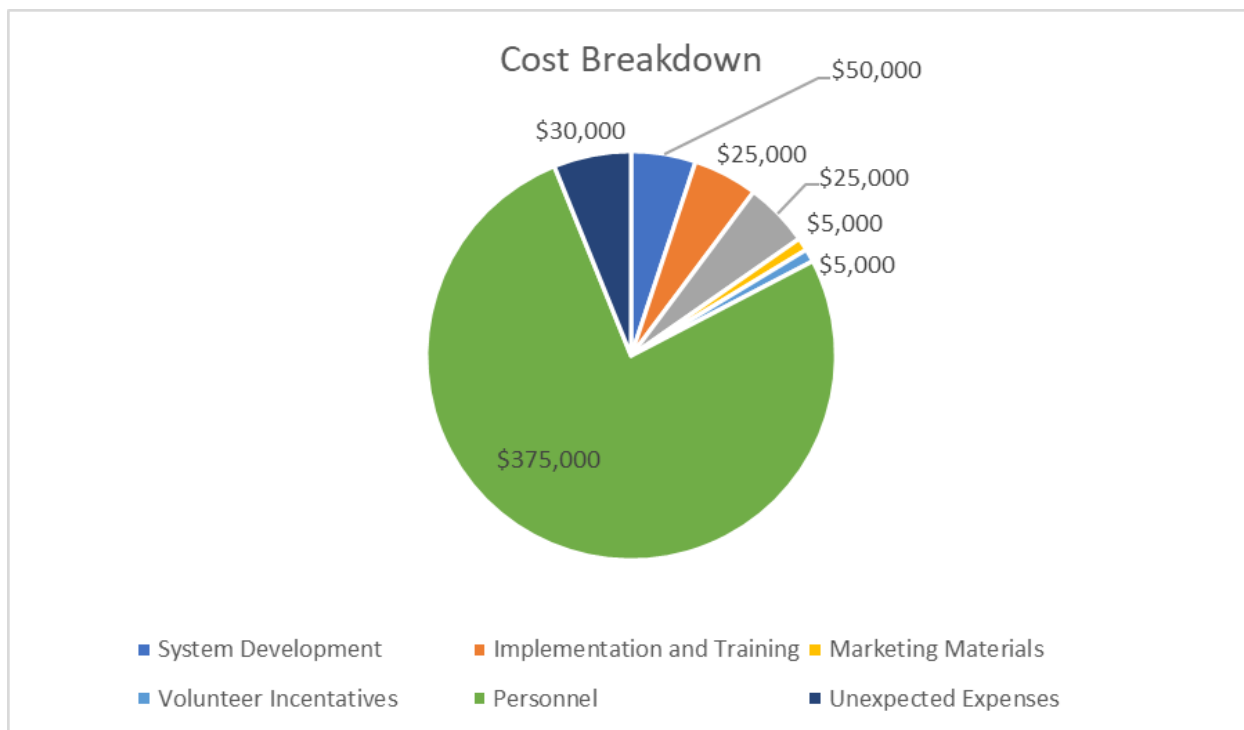2.4.4 Fill the roles with paid staff (offer first to current volunteers)

3.0 Ongoing Review and Improvement

3.1 Conduct regular reviews and evaluation of the volunteer database performance

3.1.1 Collect feedback from volunteers and members to identify area of improvement

3.1.2 Collect feedback from board on effectiveness of having paid workers

3.1.3 Make necessary changes as needed

Cost Breakdown

Pie chart: Cost Breakdown

- $30,000
- $50,000
- $25,000
- $25,000
- $5,000
- $5,000
- $375,000

Legend:
- System Development
- Implementation and Training
- Marketing Materials
- Volunteer Incentatives
- Personnel
- Unexpected Expenses

Personel (over 3 years)	System Development	Implementation & Training
Salaries $300,000 Benefits $75,000	Third Party $25,000 Hardware /Software $25,000	Instructor Fees $15,000 Training Materials(workbooks, handouts) $5,000 Other: $5,000
Total: $375,000	Total: $50,000	Total: $25,000
Volunteer Incentives Gifts (certificates, personalized mugs, t-shirts, keychains $5,000 Total: $5,000	**Marketing Materials** Print advertisement - $2,500 Digital advertisement - $2,500	**Unexpected Expenses (e.g. data conversion, upgrades)** Total: $30,000

Critical Path - Gnatt

Task	Dependencies	Duration (Days)	Start	Finish
Phase 1: Needs Assessment	-	10	0	10
Develop survey and interview questions	Phase 1	3	0	3
Conduct surveys and interviews	Phase 1	7	3	10
Analyze data	Phase 1	5	10	15
Phase 1.1: Hire Staff	Phase 1	10	0	10
Develop job descriptions	Phase 1.1	2	0	2
Post job openings	Phase 1.1	1	2	3
Screen and interview candidates	Phase 1.1	5	3	8
Conduct reference checks	Phase 1.1	2	8	10
Select hires	Phase 1.1	3	10	13
Phase 2: Database Selection	Phase 1	15	0	15
Research database systems	Phase 2	5	0	5
Select database system	Phase 2	3	5	8
Phase 3: Project Planning and Implementation	Phase 1, Phase 2	20	15	35
Develop Project Plan	Phase 3	5	15	20
Implement database System	Phase 3	7	20	27
Train current staff and volunteers	Phase 3	10	27	37

Update operational processes	**Phase 3**	**8**	**37**	**45**
	Phase 1	**20**	**0**	**20**
Create marketing materials	**Phase 4**	**3**	**0**	**3**
Promote volunteer opportunities	**Phase 4**	**5**	**3**	**8**
Hold interest meeting	**Phase 4**	**2**	**8**	**10**
Train new volunteers	**Phase 4**	**5**	**10**	**15**

Communication Management Plan:

Stakeholder communications requirements:

We encourage all stakeholders to actively participate in every meeting. Meetings provide a platform for sharing updates, discussing progress, and addressing any issues or concerns.

Communications summary:

The purpose of the meetings is to provide updates on the implementation of our new project aimed at enhancing volunteer engagement, member experiences, and service extension at Agape Cares. We want to ensure that all stakeholders, including staff, board members, and volunteers, are aligned with our project goals. This update will detail our progress, including key milestones, challenges, and future plans. Timely updates and the use of visuals will help us keep everyone informed and engaged.

Stakeholder	Communications Name	Delivery Method/Format	Producer	Due/Frequency
Project Manager	Monthly meeting updates Weekly project status	In person meeting, Microsoft Team chat, Email	Sydney Mercer	2nd Tuesday of the month at 1:00PM Every Friday
Board of Directors	Monthly meeting update, summary reports	In person meeting, Microsoft Team chat	Mike Avery, President	2nd Tuesday of the month at 1:00PM
Volunteer Coordinator	Status/update report	In person meeting, Microsoft Team chat	Kelcy Lee	2nd Tuesday of the month at 1:00PM
Executive Assistant	Status/update report	In person meeting, Microsoft Team chat, emails	Nancy Hernandez	2nd Tuesday of the month at 1:00PM
Grant Manager	Status/update report	In person meeting, Microsoft Team chat	Omni Butler	2nd Tuesday of the month at 1:00PM

3 selected volunteers	Updates	In person meeting	Selected volunteers	2nd Tuesday of the month at 1:00PM

Risk Management

Project Name: : Agape Cares Volunteer Initiative: Increasing Engagement and Capacity

1. Methodology:

To effectively address its volunteer shortage and operational challenges, Agape Cares will implement a comprehensive risk management plan. We'll start by identifying risks by talking to people involved, reviewing documents, and looking at outside factors. We will then assess the likelihood and impact of these risks using a risk matrix. We will assess the severity of each risk and implement appropriate strategies. Regular monitoring and adjustments will ensure the plan's effectiveness. We will analyze qualitative and quantitative data to assess the plan's effectiveness and make appropriate changes.

2. Roles and Responsibilities:

Person	Roles and Responsibilities
Sydney Mercer	Project Manager
Gary Stine	Risk Manager (identify and assess risks)
Blair Hardin	Risk monitoring and control (track identified risks, monitoring their status)
Clarice Mitchell	Risk response (develop strategies to avoid/mitigate risk)
Mike Avery	Communications (communicating risk-related information)

3. Budget and Schedule:
$500,000 and a one year schedule

4. Risk Categories

1. Operational risk - issues with technology systems used for volunteer management; ineffective communication between volunteers, staff, and members

2. Volunteer risk - attracting and retaining volunteers; lack of engagement or motivation among volunteers, volunteer burnout

3. Internal risk - technological issues, legal compliance; inadequate funding

4. External risk - decrease in funding; volunteer availability; community needs

5. Reputational risk - volunteer and member dissatisfaction;

5. Risk Probability and Impact

Risk Category	Probability	Impact
Operational Risks	Moderate	High
Volunteer Risk	High	Moderate to High
External Risk	Moderate to High	High
Internal Risk	Moderate to High	High
Reputational Risk	Moderate	High

6. Risk Documentation

By using these documentation methods, Agape Cares can effectively track, monitor, and address risks. A risk matrix can visually represent the probability and impact of each risk. For each risk, we should create a detailed plan outlining how to avoid or reduce the risk, including contingency plans. Meeting minutes should document discussions and decisions, with clear action items and assignments. A risk dashboard can provide a visual overview of risk status, progress, and key metrics. All of this information should be stored in a central location for easy access.