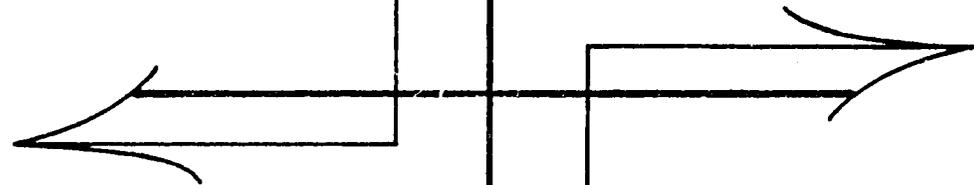
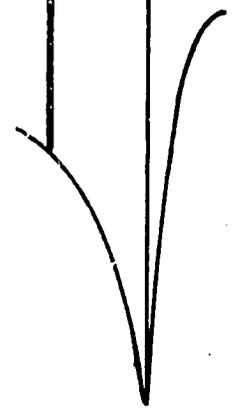


**A Guide
to
Mobilizing**



**Technical
Assistance
Volunteers**



A GUIDE TO MOBILIZING TECHNICAL ASSISTANCE VOLUNTEERS

-A "How-to" Manual for Organizing Local Volunteer Assistance
for Community Problem-Solving

Volunteers in Technical Assistance



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SCOPE AND PURPOSE

The intent of this manual is to provide to readers in the field (at both an agency and a grass-roots level) some tested procedures for the development of a volunteer technical assistance operation, through the sharing of knowledge and experience of the author. This booklet will--hopefully--shorten the time you need to develop a similar basic system to supply volunteer technical assistance in your community. If, after reading this handbook, you begin to see, and subsequently set about to use, some previously under-used, local human resources for solving community problems, then the purpose of this writing will be well served.

HOW TO USE THIS MANUAL

Many people will see this manual. Some will use it well. Others will be put off by its length, foreboding terminology (technical assistance??), and their reluctance to go through some mind changes (new ways of thinking about old things). Partly this is the fault of the authors, since so much information and advice has been crammed into it--so, here are a few ways to make the use of the manual a more pleasant and fruitful process:

1. Start by reading Section I which briefly explains just what a volunteer technical assistance (TA) operation is all about. If, after that, you think that such an operation might be of help to you in your work as a community problem-solver, then,
2. Skim through the whole booklet before getting too deeply involved in any one section; by this time you should be excited, so
3. Locate a quiet place and read carefully through Section II, the "How-to" part, turning to the appendices every time the text mentions one, so you get the full thrust of the program.
4. Decide if such an undertaking is feasible in your particular situation. If your answer is "Yes", go on to # 5; if it is "No", to # 6.

5. Choose from the following options:

Start to work immediately on developing a basic TA program, using Section II as your guide.

Read Section III (CONSIDERATIONS FOR A MORE COMPLEX TA OPERATION) filing that information away for use at a later time. Then, begin work immediately on a basic TA program.

Read Section III and begin work immediately on developing a full-blown TA program, using Sections II and III as guides.

6. Send this manual to someone you think might be interested in putting together a technical assistance operation for their community.

SECTION I:

Introductions to a Volunteer Technical Assistance Operation

Sometimes terminology is as formidable a barrier as a brick wall. Every group tends to develop its own special vocabulary. Familiar words and phrases acquire unfamiliar meanings. If the term "technical assistance program" makes you uncomfortable, why not think of it as a person-to-person exchange of knowledge because everyone involved has something to learn as well as something to teach. That's what it's all about.

WHAT IS A TECHNICAL ASSISTANCE PROGRAM?

One way of explaining the essence of a technical assistance operation is to describe it as a problem-solving service wherein local volunteer experts are mobilized to serve as consultants (skilled helpers) to local agencies and programs. This description implies the existence of three interacting "parties":

1. The REQUESTOR or CLIENT - the person or persons working in local agencies or programs whose budgets preclude the hiring of paid experts to solve certain technical problems they are encountering.
2. The TECHNICAL ASSISTANCE (TA) VOLUNTEER(S) - the available person or pool of persons composed of professional and/or specially trained and experienced experts in some field, e.g., an accountant (CPA).
3. The COORDINATOR - the person or staff of persons who "match-up" or bring together the requestor and the TA volunteer(s).

The interaction among these three parties does not simply happen on its own. Rather the delivery of technical assistance requires some sort of organization or systematization. The system may be very basic and informal, or, it may be more complex and structured. This delivery system can take many forms. For instance,

Limited basic service--one concerned individual compiles a roster of 15 volunteers for one area of assistance, i.e., helping minority business ventures.

Intermediate--a Community Action Agency hires one half-time staff person to develop TA volunteer services for day care centers.

Full-scale --another Community Action Agency sponsors TA programs for across-the-board aid to all social programs in the area. Or, a new local organization seeks funds to hire staff to serve all types of programs ranging from anti-poverty efforts to community theater.

These systems vary widely in scope and form, being limited solely by availability of resources and level of commitment. They do share one common but sometimes overlooked prerequisite, a special type of records' maintenance--case coordination. Regardless of the degree of formality or informality of a TA operation, the process of case coordination--the close and frequent interaction among the Coordinator, the Requestor, and the TA Volunteer--is central to the success of the operation.

Case coordination involves, for each case, a careful process of in-depth interviewing and long-term monitoring of both Requestor and TA Volunteer by the Coordinator. As indicated, this is the key to the delivery system whether one is working with one dozen or one hundred clients, with one dozen TA Volunteers or one hundred.

Below is a sketch of the process of volunteer technical assistance delivery. Each step described is discussed more fully in Section II.

In response to a request for technical assistance from an agency, organization, or individual, the Coordinator establishes the eligibility of the Requestor, then thoroughly discusses the problem with him in order to clarify the request and determine the type of assistance needed. Having made a decision, the Coordinator then recruits and selects appropriate Volunteers, briefs the Requestor and Volunteer about each other, and puts them in contact. Maintaining continuing communication with both parties throughout the case, the Coordinator acts as the focal point of the process, analyzing, defining, scheduling, expediting, trouble-shooting, and making sure the delivery of technical assistance is on schedule and satisfactory to the Requestor. Working with the Requestor, the Coordinator decides when the case is to be closed; the Coordinator's evaluation of the technical assistance given completes the formal routine of closing a case.

The following case illustrates the time involved for a typical case as the process operates:

CASE # 110049 DAY CARE CENTER

Requestor to Coordinator (30 min. telephone conversation)	Day 1	Stated day care center was soon to start. Needed experienced persons on-site for a day or two to tie up all the loose ends and get operations off to a smooth start.
Coordinator with Volunteer (30 min.)	Day 3	Contacted a Volunteer with strong background in education and organization. Volunteer doubted she could do it, but agreed to discuss it with Requestor.
Volunteer to Requestor (15 min.)	Day 3	Volunteer called Requestor, became sympathetic to need, agreed to work on-site in two weeks.
Volunteer On-site (2 days)	Days 13 & 14	Gave on-site consultation on day care center expenses and Head Start program. (Also made 50 min. tape on early childhood education to be used in staff training.)
Coordinator with Volunteer (20 min.)	Day 15	Called volunteer to ask for report.
Coordinator with Requestor (25 min.)	Day 15	Called Requestor for her evaluation. Former declared consultation "overwhelming success". Impressed with Volunteer's energy, ability, and rapport with group. Discussion led to new requests: problems developing from funding--wanted list of new funding sources; could the same Volunteer return after start-up to conduct training workshop? Coordinator suggested formal letter of request to Volunteer.
Coordinator to Requestor	Day 20	Sent information on foundations known to fund Requestor's type of project.
Volunteer to Coordinator	Day 22	Sent in written report.

SUMMARY AND READER'S OPTIONS

You have just read through a bare-bones description of a volunteer technical assistance operation. In short, you have learned about one method of locating expert help to solve difficult, complex problems, ones that face community people, organizations, and agencies all too often.

Now, take a moment to evaluate what you know at this point. You may find it helpful to assess your feelings in the following "either/or" framework.

Either,

1. You have a pretty clear idea of what a volunteer TA is all about

Or,

2. You don't.

If you are leaning toward choice Number 2, turn to Appendix I (page 41) and quickly review the VITA case studies, concrete examples of what a real volunteer TA operation does. You now lean toward choice Number 1, right?

Since everyone now agrees that they do have a clear idea of what a volunteer TA operation is all about, it's time to decide if such a program would be of help in your community. (It's too soon to cloud your head with thoughts about "feasibility" or "cost-benefits", so just decide if such an approach would be a good thing. If your answer is "yes", quickly skim through the rest of this manual and come back to Section II for some careful study on the "How To.." of setting up the program.

SECTION II:

Procedures for Building a Basic Volunteer Technical Assistance Operation

A volunteer TA operation calls for the simultaneous encouragement of requests from the client sector, the recruitment of appropriate volunteers to work on cases, and--once the request and the TA Volunteer are matched--a careful monitoring for the duration of the case. Finally, some formal program of overall evaluation of the entire operation is necessary for possible improvements in the delivery system. Thus, there are four major procedures common to any size or any form volunteer TA operation.

1. Development of the TA Volunteer pool
2. Generation of requests from community organizations, agencies, programs, etc.
3. Case coordination
4. Evaluation of the TA delivery system

This section, along with some random observations at the end of it, will answer for you the "How to's" of putting together such a TA operation. You will also be able to answer questions concerning the feasibility of beginning such an operation in your own community.

BUILDING THE TA VOLUNTEER POOL

If one is planning a TA program responsive to broad community and client needs, the volunteer roster should represent all kinds of experience and skills. Effective networking (a chain of contacts leading to the assignment of a qualified volunteer) depends upon a list of individuals who, in addition to their own skills, provide access to others in the community.

The early development of a large volunteer roster is therefore desirable even before there is immediate demand for their services on specific cases. Pending actual TA case assignment, volunteer interest can be maintained by seeking and using their assistance in other aspects of the developing TA operation.

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Recruiting

The request for a Technical Assistance Volunteer evolves from a Client's need for expert assistance to solve a definable, limited problem. Recruitment, therefore, focuses on groups of highly experienced people. Some sources are:

- Professional, business, university, and skill trade organizations
- VISTA and Peace Corps "veterans" (see Appendix III, page 66) for special help)
- Community services office of corporations
- Board and committee members and their contacts
- VITA Volunteers (contact through VITA)

The channels for reaching these potential Volunteers closely resemble those of any other recruitment effort, and include:

- Ads in organizational newsletters and professional journals
- Individual mailings
- Attendance at conferences - for personal contacts, opportunity to 'leaflet' sympathetic listeners; participation in conference workshops where relevant
- Ads and stories in local newspapers and publications
- Announcements at local business, civic, recreation, and religious meetings
- Public service spots on local radio/TV stations

Screening

The screening of those Volunteers already identified and recruited must be done as carefully as the hiring of staff members. The Volunteers must have a sensitivity to the fine points of assistance, the relationship between donor and recipient. They must be able to work on their own, listen carefully to and be willing to accept the Requestor's definition of the problem, and be willing to participate in the constant three-way communication efforts of Coordinator, Volunteer, and Requestor. Finally, the Volunteer must be professionally competent in his/her field, prepared to make a firm commitment of time and effort to the project. Any successful process for either the screening or classification of Volunteers will make use of many sources of information, such as:

1. Personal resume or biodata sheet
2. A standardized TA Volunteer application (see Appendix II, page 47)
3. Personal interview between the TA Volunteer and the screener
4. Recommendations from TA Volunteers already on the volunteer roster

Assessing and Classifying TA Volunteers' Skills

Assessment of the skills of each Volunteer is a challenge. The latter's personal resume, the completed volunteer application, and use of other techniques in screening are only indicators. Much depends on the measured judgment of the person responsible for this phase of the building process. In addition, familiarity with the range of assistance which the TA operation is offering is likewise a 'must' if meaningful classification is to result.

Clearly, this task of assessing and classifying implies the existence of some means of access to the results, once the process is completed. Some sort of information retrieval system is another 'must' in every TA operation. This system may be looked upon as the "skills bank" from which the Coordinator makes "withdrawals" to meet the demands of its Requestors. The system for operating a skills bank need not be complex; one that is simply designed--a card catalog filed alphabetically by subject--will provide a base for rational expansion as the TA operation grows.

At a minimum, this classification system or skills bank would consist of a set of master cards which provide a profile of each Volunteer and allow for a simple cross-referencing system. As indicated on the sample below, the card includes information on all important skills plus information about special interests, organizational ties, and the like.

SKILL. Day Care

NAME: Marilyn Carver ADDRESS: 123 Elm St., City
PHONE (HOME): 223-1915 (BUS): 223-9874

SPECIAL SKILL: Day Care--Staff & Board Training

(FORMERLY HEAD OF TRI-COUNTY DAY CARE COUNCIL)
Active in Neighbors Uniting Project--3rd Ward

Regular updating of the skill bank is an integral part of any successful TA operation. Programs that service multiple problem areas need a card catalog that will allow the Coordinator to flip to any subject and "pull" the cards of all Volunteers with skills in that area (Appendix II, pages 47-49).

GENERATING REQUESTS

Locating and encouraging a potential Requestor is often the most difficult part of the program. The first task is to organize a coordinated, community-wide effort aimed at making contact with those groups and agencies that need this kind of "expert" help. Sources for such contacts are

many; the extent of any search will depend upon the limitations set for the program areas or groups to be served, and will include,

- Community Action Agencies and/or health and welfare councils that have made their own surveys
- Local government and foundation grant offices
- Service organizations
- Religious, political, business, and cultural groups
- District office of local Congressperson, mayor's office, etc.
- Other volunteer programs of purely local nature--Children's Aid, etc.
- National Center for Voluntary Action (NCVA) for a list of volunteer programs in your area (Appendix III, page 65)
- ACTION Domestic Program Fact Book (Appendix III, page 63)

Since this study represents the first public relations effort of the new TA operation, those making the contacts for the study must be able to explain the technical assistance concept, clarifying the difference between this and other volunteer services, and emphasizing heavily its client orientation. It is important that no specific commitments be made to agencies being queried. Rather, a potential Requestor should be approached with a question about what type of assistance could be used in his operation if it were available. Such an approach allows the new TA program some freedom in choosing first cases.

Personal contact is of the essence in interpreting the services offered by a TA operation. Former Volunteers (VITA, VISTA, Peace Corps) are often excellent sources for client as well as volunteer contacts, since many continue their involvement in human service projects. If the size of the staff limits the amount of contact-by-appointment, then speaking engagements, participation in conferences and seminars, should be explored as a means of reaching larger audiences. Again, public service spots on radio and TV, stories in local papers, can help locate new cases as well as potential Volunteers.

CASE COORDINATION

Case coordination demands analytical and organizational ability together with sensitivity to all aspects of the "assisting" process. Below are the major elements involved in coordinating a case; each is presented in greater detail later in this section.

- Interview with potential Requestor
- Clarification of the request
- Selection of the appropriate technique for TA delivery
- Volunteer search and assignment
- Definition of responsibilities and expectations
- Monitoring
- Case closing

Interview with Potential Requestor

The first interchange between the Coordinator and the Requestor is concerned with obtaining basic information. If the client is new, the Coordinator must first establish the eligibility of the Requestor. This is based primarily on financial considerations, i.e., certain agencies which can afford to hire outside consultants would not meet the eligibility standard. After this hurdle is passed, the Coordinator explains the technical assistance process, outlines general procedures, defines roles and responsibilities. After getting some background information about the organization which is seeking TA, the Coordinator must get background information about the problem to determine: a) its validity; b) its priority as compared to other requests; c) the ability of the TA program to respond to the request. All this data is written on a contact form (Appendix II, page 51) and any future contacts regarding the request will also become part of a written record.

In order to obtain valid information, the Coordinator must ask very precise questions, like--

1. Description of the program, what it is, what it's trying to do; proposing to do?
2. What progress has been made? Is there evidence of support for the program?
3. Is there a full-time staff? Is there current or potential financial support for the program? Does the budget allow for handling or sharing costs of TA?
4. Has the problem and/or need for assistance been discussed with other staff or organization members? How do they feel about it?
5. If training is requested, has the director discussed this with employees? Do they agree upon need? Have there been any previous training programs? Results? Expectations?

Clarification of Request

If the Coordinator is satisfied that this client is an eligible and likely prospect, the discussion concerning the possible role of the Technical Assistance Volunteer in solving the problem continues, now focusing on a different set of specific questions. [As soon as the request has been accepted as a case, the Coordinator begins making notes on the Technical Assistance Form (Appendix II, page 53) which now becomes the master record for the case.]

1. How do you (the client) think the Volunteer can help? What do you expect the Volunteer to do?
2. How does the role of the Volunteer fit into the total picture of program development as seen by the Requestor?
3. What kinds of skills should we be looking for in a Volunteer consultant? Experience?
4. What type of personality is most likely to fit this request?
5. What do you expect to accomplish as a result of the Volunteer's involvement in your program?
6. To whom will the Volunteer relate and talk?
7. Are there time limitations on the Volunteer's involvement? What are they?
8. Is this a single problem area that can be handled by one Volunteer, or does it call for a team or workshop approach?

Selecting Appropriate Techniques for TA Delivery

The great majority of cases are likely to call for the assignment of a single Volunteer on a one-to-one relationship with the Requestor. There are, however, special cases where conditions indicate the use of a volunteer team or workshop. In all cases, the mode of delivery reflects the need of the Requestor and the availability of appropriate Volunteers. Some options for delivery would be:

Volunteer teams:

Where a case is multi-faceted or otherwise too complex to be handled by a single Volunteer, a team of two or more may be used either simultaneously or in sequence. For example, a fledgling business might require assistance in marketing, accounting, and management.

In organizing a team, one experienced Volunteer might be asked to recruit assistants and to coordinate the input of him/herself and others. Because of the heavy responsibility assigned this person, a more painstaking recruitment is necessary. One tactic lets the Coordinator call a Volunteer known for expertise in the area requested. That person is then asked to recommend a team leader, if he/she cannot assume this role; the team leader will assume the job of organizing the team. Should there be no appropriate Volunteer in the file, an expert in the field is contacted for advice. Whatever the steps to recruit a team, intensive discussion with the team leader is essential. The team leader is then responsible for coordinating the team and maintaining active liaison with the Requestor and the Coordinator.

Workshops

These provide an excellent opportunity for achieving maximum impact from the effort of one or two experts. To facilitate the job, the workshop leader should be provided with the background of the participants. The leader should know what they perceive as the goal of the session, what they hope to learn from it.

The decision to sponsor a workshop is generally based on one of four reasons. First, a single agency wishes to train several staff members in one or two skills--i.e., fund-raising and proposal writing. In this case, the Coordinator will work with the Requestor in recruiting a team of trainers, designating one as the Coordinator/liaison person with the requesting agency. The Requestor will handle logistics; both Volunteer and agency will assume responsibility for the program, evaluation, and report (feedback) to the TA operation.

Second, several agencies may request assistance in the same area, such as Board Training. In this case, the Coordinator, together with the assigned Volunteer(s), will develop the format and content of the sessions, and handle all arrangements.

Third, there may be a lack of local experts in an area for which many requests have been received. If out-of-town expertise is called for, the workshop can provide a forum for full utilization of this resource. Conceivably, participants may be asked to share the cost of the Volunteer's travel and living expenses.

Fourth, in an exception to its policy that all assistance is Requestor-initiated, the TA operation may find, in reviewing requests over a several month period, that there is a clustering of problems in one area; possibly Volunteer feedback may indicate operational weakness and suggest skill areas for development. In the latter situation, for example, a VITA program in Boston took the initiative when it appeared that Requestor agencies had weak accounting systems and bare familiarity with basic legal requirements, yet had not requested assistance in these particular areas. Workshop announcements were mailed to their client list. Although advance registrations were few, there was a large turnout on the day of the workshop and participants gave sessions a high rating.

Another important aspect of workshops is their usefulness in servicing outlying rural areas. Many sessions, although designed for urban groups, deal with problems of equal concern to rural agencies; in such cases, invitations should be extended to the latter. The added attendance (rural) may require extra staff, or scheduling of additional sessions for the workshop, but such demands are minimal and manageable, within the original framework of the workshop plan. The involvement of rural people may also lay the groundwork for developing additional services for them.

Other Options

The variety of requests for assistance suggests yet another technique for responding. A full-scale office found it was getting many informational requests on one subject--where can one find sources for money and how does one search? As a result the staff found itself repeating the same spiel many times over. They concluded that it was much more efficient to hold "Information Sessions" conducted by the staff on the last Tuesday of each month. Participants were told that volunteer assistance would be available to review their first proposal drafts at a later time.

Similarly, contact was made with the National Accounting Associating requesting one day per month consulting time to advise Requestors and to answer specific questions. Requestors were notified about the new service, and appointments were scheduled at the TA office. It should be noted that this same approach can be used with staff from regional offices of federal agencies, i.e., if one needed an expert on interpreting HUD regulations, the regional office could be tapped for assistance. One might assume that local and state government offices as well as private organizations could provide the same kind of help.

Volunteer Search and Assignment

There may be some confusion in getting at all the details involved in the process of locating the right Volunteer for a particular case. This is the point at which the three-way-communication among the Coordinator, the Requestor, and the Volunteer becomes all important. Therefore, the actual process has been broken down into several separate steps:

Step One: Based on the information received from the Requestor, the Coordinator begins a Volunteer search within three days of receiving the request. Depending on the nature of the problem, the Coordinator will either, a) search the skill bank; or, b) recruit someone (new) specifically for this case, if no appropriately skilled Volunteer is in the files.

Step Two: Using the information from the Volunteer's own application, the Coordinator is able to select the most suitable Volunteer for a given case by matching the need with the right skill.

Step Three: The potential Volunteer is then contacted by phone. The Coordinator describes the Requestor and the case to the Volunteer, indicating the projected amount of time needed. If the Volunteer is a new contact, the Coordinator describes the total process in detail. He checks to see if the Volunteer can make it within the time span desired by the Requestor, and if the Volunteer thinks his/her skills are applicable to the case. If the Coordinator thinks the Volunteer is suitable, the latter is asked to contact the Requestor, personally, within two days to discuss and clarify the case and determine if the assignment is mutually satisfactory.

Step Four: The Coordinator again contacts the Requestor, giving the name and background of the Volunteer.

Step Five: The Volunteer now contacts the Requestor (as per instructions from the Coordinator) and gets a more detailed picture of the problem. At the same time the Requestor "interviews" the prospective Volunteer to insure that the latter is acceptable in terms of skills and personality.

At this stage, a new variable may enter the picture. If the Requestor at any time in the process feels that the Volunteer assigned will not do, regardless of reason, that Volunteer is removed from the case and a new one assigned. Of course, the Coordinator tries to resolve conflicts and problems before this stage is reached, but the client preference is always honored. So, if a match is not possible between this Volunteer and that Requestor, the link is broken and the whole selection process begins again with Step #1. If time and the list of acceptable Volunteers permit, a Requestor should be allowed to choose a Volunteer from a group of three selected by the Coordinator. At Step #4, the Requestor could be contacted to see if he recognized some of the names and had a preference (or antipathy) for any one of them. The process would then proceed as usual. But if a match is made, all move along to the next level:

Step Six: If Volunteer and Requestor appear to match, a meeting is set up between them to plan strategy. In the case of a new Volunteer or Requestor, or a complicated problem, the Coordinator may choose to attend the meeting.

The need for maintaining accurate records of all contacts in this process cannot be over-stressed. Both the contact sheets and the technical assistance forms mentioned before will be filled in at every

step, to insure that dates for contacts will be kept by all. The following is a desirable cycle for scheduling responses to clients:

Acknowledge initiation of search---within 3 working days after receipt
of client request
Second contact --within 5 working days after
acknowledgement

- Requestor should be contacted each successive 5 working days until volunteer Candidate is found
- Requestor and Volunteer should be contacted every 5 days after Volunteer is identified to check if they have made contact and to document results
- Every contact report thereafter should have a future follow-up date

Definition of Responsibility and Expectations:

Following the strategy meeting, the Coordinator contacts each of the other two to insure that all have the same understanding of the time schedule, their respective responsibilities and expectations. Ideally, the Requestor should be able to expect assistance within a two-week period. Should the Volunteer be unable to respond that quickly, the Coordinator should be certain that the delay is acceptable to the Requestor.

In addition to his/her performance on the job, the Volunteer is asked to; a) prepare an evaluation of the case, and b) maintain a file on useful contacts and materials found, or developed and used during work on case. The Volunteer is also reminded of any financial record-keeping necessary for claiming expenses incurred during the case work. Finally, he/she is asked to accumulate any material that might prove useful in the TA operation's public relations work in the community--tapes, photographs, local news coverage, etc.

Monitoring

In the monitoring process, the Coordinator might address the following questions to both Volunteer and Requestor (and compare notes!):

1. What has happened since the last contact with the Coordinator?
2. How successful was the consulting effort?
3. What future plans are in the making?
4. What is the perspective of each?
5. What negative comments would be applicable?

As noted, the Requestor is sometimes reluctant to criticize or complain about the Volunteer's performance. It is the Coordinator's responsibility to correctly interpret and clarify the scope and level of services the Requestor can expect from the Volunteer.

Case Closing

The Coordinator should encourage the agency to close a case when the original problem has been suitably resolved. If other problems have developed, it is advisable to open a new case unless: a) the present Volunteer has sufficient skills to work in the new problem situation; b) the Volunteer has the time to invest in working on the new problem.

Each "Closed Case" should include all pertinent information such as as the Volunteer's evaluation of the case (Appendix II, page 55) comments from the Coordinator, any remarks, or correspondence with the Requestor--Appendix II Requestor Evaluation Form, page 57--thank-you note, report on impact of the TA service within the organization, the community, etc. It may include guarded comments about expectations versus performance from any of the three "parties" involved, but please remember that these are open files and concentrate on constructive criticism.

The file of closed cases will ultimately become one of the more important resources of the TA operation, useful in making quick responses to similar problems, as background material for workshops and training of new staff, as reference in fund-raising and proposal writing.

EVALUATION OF THE TA DELIVERY SYSTEM

Evaluation represents the final stage in tying together the building of a basic TA operation. In a way, the evaluation may be likened to a post-operating "inspection" of a project which was built according to the preceding blueprint steps. Its focus is not on the individual case (though the cases do provide the convenient unit for assessment) but rather on the functioning of the total TA delivery system. The following are some thoughts on techniques for carrying out this phase of the operation.

Computation of "Man Days"

"Counting the Hours" isn't the most satisfactory evaluation of any Volunteer's performance. However, on some occasions this computation may be the best understood "yardstick" for measuring the program's impact. "Man Days" is a tallying of the actual number of hours a Volunteer invests in a particular assignment then multiplying that by the going rate charged by consultants in that field in your area. (Since schedules of typical fees for consulting services may be difficult to obtain, it's a good job for interested Volunteers and/or board members to gather the facts about what pertinent services cost through their business and professional affiliations.) When administrative costs are added, the resulting figure represents a fair approximation of a Volunteer's donated time against that of a paid consultant in the same category.

While most participants in the TA process---Volunteers, staff, and clients--recognize the drawbacks and limitations in using this approach to determine the true value of the service, there are occasions when "donated Man Days" is a useful tool to sell the program to a local potential funder. It should never be used as the chief method of measuring the worth or impact of a particular program.

Telephone Interviews

Experience with evaluation has produced a series of interview questions (listed below) that can be addressed by phone to clients. It is suggested that this type of evaluation be conducted annually on a random sampling of 25 per cent of the year's cases. Criteria for performance reflected by the questionnaire are as follows:

1. Responsiveness on the part of the TA operation: Was it business-like and perceptive, yet friendly?
2. Clarification: How effective is the TA operation in helping to define the specific problem?
3. Staff performance: Was a good match made so that a Volunteer with the right skills and the right sensitivity was assigned to the case?
4. Timeliness: If quick action was needed, did the TA operation come through? If the project was long-range and/or complex, were Volunteers available as the Requestor needed them?
5. Referrals: If the TA operation referred a client to other sources, were they new to him, useful?
6. Case follow-up: Are contacts by Volunteers and staff sufficient to insure that client needs are actually being met?
7. Impact of the TA operation: Are people benefiting in their social or economic lives through projects assisted by this service? To what extent?
8. Direct value of the TA operation: How important was the role of the TA operation in the total project of the Requestor? If no real benefit occurred, is staff or volunteer failure in any way responsible?

Case Studies

The peculiar value of the in-depth case study is that it draws together all the elements of the technical assistance relationship. Coordinators, Volunteers, and Requestors all assess the same project, and in the process, assess the human relationships involved. Ordinary down-to-earth conversations reveal more about the human relations aspect of assistance than the most carefully drawn questionnaire. Since the human interplay is at the core of people's efforts to solve complex problems, what is learned through detailed case studies is extremely valuable.

The criteria used in evaluating the high impact cases relate to such factors as the number of people affected and the kind of effect, i.e., economic or "quality of life" improvement, the types of skills utilized, and the relative importance of the TA project.

SUMMARY AND RANDOM OBSERVATIONS

You've just waded through a section crammed full of "nuts and bolts" details about building a TA operation.

You've seen that you must not only get a fix on both your Volunteers and Requestors, but also that once this identification and organization process is over, you must match up these two groups so that your product (TA) can be delivered. With that kind of knowledge under your belt it's time for you to consider the feasibility of putting together such an operation for your community. But, before you get too involved, glance down the following list of random observations that derive from VITA's five years of experience in the delivery of volunteer technical assistance at the national and local levels:

1. Large urban areas (over 300,000 pop.) appear to be fertile ground for a TA project. They present an abundance of the types of problems responsive to such TA delivery; at the same time they attract the necessary experts, and maintain the institutions and communication systems vital to generating and responding to requests.
2. Technical Assistance services in urban areas will be sought by poverty and low-budget projects to the extent of a TA operation's capacity. That is, a need exists without which many important self-help projects may fail.
3. Rural and small town areas, despite severe and obvious needs, present special problems in mustering resources and maintaining communications. Individuals or groups in the area already at work on local economic or social development problems may offer the volunteer TA program a good place to start generating requests as well as locating Volunteers.

Other possibilities include pairing a rural program with a similar effort in an urban area so that they can jointly sponsor workshops and training sessions. An established program in a city may do some exploratory work in an "out-reach project" with a struggling group in a nearby area where there is a defined but limited need for TA that the larger group's roster of Volunteers can provide. Past experience indicates that small projects in rural locations require much more planning and patience than is immediately apparent.

4. One sometimes notes an under-utilization of a Volunteer's service. This may stem from the client's reluctance to make demands of unpaid staff, or may be due to an inadequate explanation of the potential scope of the Volunteer's contribution. Therefore, a clear definition of expectations of both Volunteer and Requestor is essential prior to recruitment of either. A helpful concept to remember: "In effect,

the Volunteer should be one who is hired, fired, appreciated, and supervised...indeed, everything except paid...like every other worker".

5. Case selection is in reality a product of the demands of the Requestor population. One may wish to establish precedent and reputation by starting with an impressive case. However, experience has shown that the initial requests of now-devoted clients tend to be quite simple. That is, the client seeks proof of a quality, responsive service before asking assistance for complex problems. Similarly, initial cases tend to evolve from contacts made during the construction of the TA operation.
6. Well-managed volunteer TA not only costs less but is often a more effective route to successful TA delivery than paid services.
7. Volunteers should be available and able to provide the needed (requested) assistance within one to three weeks.
8. Volunteers have found that one to three-day, on-site assignments are manageable time periods to be absent from their jobs. In recognition of this fact, some corporations (Shell, Pittsburgh Plate Glass, Xerox) as well as smaller companies, occasionally have allowed their employees time to volunteer without loss of pay. In addition, some corporate volunteer offices have assumed a high degree of responsibility for providing appropriate Volunteers.
9. Certain types of cases produce impact on a constituency much broader than that of the requestor agency. (Appendix I pages 41-44, the VITA Case Studies for this and the following comments.)
10. Volunteers often act as brokers between other service agencies and the Requestor. Such interaction sometimes activates participation from these agencies.
11. Volunteers often are aware and have ready access to previously untapped local resources.
12. There are several approaches to assistance ranging from a one-time assignment of a single Volunteer to an assignment of several Volunteers over a period of time, working individually as part of a team, or within the framework of a workshop session.

Fine, but the big question is still before you: Is it feasible to develop a technical assistance program in my community? The following chart can offer some additional guidance:

<u>Reader's Decision</u>	<u>What to Do</u>
Yes	Using the information you've acquired so far, begin developing the TA program
	OR
	Move on to Section III for some additional considerations
No	Pass this manual on to someone whom you think might be interested in developing a TA program for their community
Not sure	Take yourself <u>and</u> your big question out into the community (individuals, local agencies, programs, projects, institutions, community groups, clubs, etc.) In effect, conduct a mini-feasibility study. Several days spent talking <u>and</u> listening will provide your answer.

SECTION III:

Considerations for Developing a Large-Scale Volunteer
Technical Assistance Operation

The earlier sections of this booklet, while couched within the context of a program, have dealt with procedures and principles, rather than with an administrative structure. What follows, however, is a series of observations and recommendations designed for the use of a Coordinator who is planning to establish an organization with permanent (paid) staff, an annual budget, etc. Certainly, though, some of the elements discussed could (and probably should) be considered as parts of even a smaller-scale program--an advisory committee, for example. Lastly, the reader who has built, or decided to build, a basic TA operation may simply choose to view the material presented from the perspective of mid to long-range expansion plans.

THE ADVISORY COMMITTEE

The development of a small-scale TA program (limited to a single program area and possibly handling only 15 cases at a time) can be done without formal organization. As an operation expands, the complexity of its program and needs usually requires the time of at least one full-time staff person, and input from persons representing different perspectives, occupations, and talents. The logical development is to form a support group--an advisory group or a board--either within an existing agency, such as a Community Action Agency, or as an independent organization.

In the case of the former, the agency's board would be available for recruitment of a committee to advise and support the TA program. The program, in turn, would provide the system for delivery of Technical Assistance. Such an agency could assist in identifying the need for a TA operation, provide entry into the client community, and recruit Volunteers.

If an operation is to need funding, the first priority in selecting supportive members is to choose person(s) with entry into the funding world, persons not already so heavily committed to other social programs that they feel conflict of interest with seeking money resources.

Since funding sources--as well as Volunteers and Requestors--tend to represent a broad political spectrum, it is advisable to seek committee members who do not have strong partisan reputations or affiliations. At the same time, an attempt must be made to select a group of people representing different elements of the community.

The following are areas in which the support group can contribute:

- Identifying and soliciting resources for funding
- Providing a link to those who need the program's services
- Providing a source for volunteer recruitment

- Assisting in performing program functions
- Analysing social issues
- Helping to define and evaluate the program's role as an advocate of social change

To maintain the Board's interest and support, communication from staff should be frequent, clear, and real. Board members should be provided with brief but readable notes on the program, goals, and operation; these materials should be reinforced through briefing sessions with staff to interpret and clarify the program, so that board members can, in turn, explain it to their friends and contacts. Simple, quarterly reports on programs and finances are essential, and results from evaluation studies should be readily and honestly shared. Staff and board members should know one another by name, preferably by face! Volunteers should be introduced to board members when feasible. Board members should be prepared to anticipate and respond in a supportive way to calls for assistance.

Staffing

The development of a TA program is a very demanding process, but in terms of staff build-up "Too much--Too soon" encourages an emphasis on quantity instead of quality in order to justify the increased salary expenses. Needless to say, such a "numbers game" is counter-productive to the program's goal. A full time Coordinator working with an assistant is generally adequate staffing for the first six months of start-up in a new TA program.

Ideally, each staff member should bring to the job some special skills: experience with social action and/or socially oriented organizations; skills and experience in a professional field which will broaden the program's specialization fields, rather than duplicate them; sensitivity; judgment and flexibility in working with people and programs; the ability to listen; background in research and interviewing. But what is needed most is people who are "born learners", curious enough to educate themselves using materials available in the office's reference collection, eager to seek out materials that will inform both staff and Requestors in the fields of interest to the clients.

Staff Training

In addition to holding or developing these human or behavioral skills, each staff member must be competent in the mechanics of filling out a request form, searching the skills files, arranging resumes of Volunteers in the order of priority for contacting. Coached by one experienced in-house staff member or outside trainers, all employees must participate in the actual process of case coordination. In addition, staff members must be able to clearly interpret the TA program to potential Requestors, Volunteers, as well as the community at large.

The following should be elements of training, whether developed within a new staff or assisted by Volunteers or staff members from other TA programs.

Tandem work-- with an experienced Coordinator allows the neophyte staff person to become acquainted with the mechanics of case documentation, the volunteer search, on-site arrangements, etc., and-- more important--to learn what questions must be answered before programming Volunteers into a case. Observation, followed by practice, followed by evaluation of the practice, constitutes a part of the job training.

On-site assignment early in the training period with an experienced Volunteer in the field provides opportunity to "get the feel" of the situation that prompted the request, learn how to handle problem definition in this particular field, and become aware first-hand of the conditions that clients face.

Attendance at conferences involving potential Requestors provides contacts, gives the Coordinator an opportunity to explain the TA program, and, in doing so, clarify his/her concept of what constitutes TA service. Such explanation frequently generates requests of a very hazy nature that requires the Coordinator to redefine them on the spot. Conferences in specialty fields, such as housing, offer an opportunity to find out what others in the field are doing, how the TA project might work together with other groups. It also gives the Coordinator an understanding of TA as part of a network.

Informal case evaluation at regular staff meetings keeps staff workers abreast of total activity; each can present specific problems and receive the benefit of group consensus on the best approach.

Reviewing sources of information and assistance clues the new staff member into the directions he/she needs to follow to explore sources for new Volunteers and informational materials. The new TA operation should be accumulating resource and reference material--pamphlets, newsletters from similar organizations, conference reports, etc.-- which become the staff library. This may be a single bookshelf or a sizeable collection, but it is an educational tool for all involved in the program--Volunteers, board members, Requestors, as well as staff.

Orientation sessions of staff with Requestors and Volunteers broadens the staff's insight into the program beyond on-site experience.

Attendance at workshops by all staff members expands the experience into in-service training for the whole staff, because both old and new staff can participate.

Sources for Subsidized Staff Assistance

It should be noted that supplemental staff is sometimes available through university internship programs and/or manpower training programs such as New Careers and Neighborhood Youth Corps. Occasionally, a supportive corporation will lend its secretarial or public relations expertise. In more than one city, the entire PR campaign--brochure design, fund-raising strategy, report system--has been executed by staff from corporate and other volunteer sources.

BUDGETARY CONSIDERATIONS

These remarks about budget are applicable to a large-scale program, i.e., one that may carry forty cases at a time, but offer guidance for the smaller program that may be thinking about expansion.

Staffing: The pace at which the aforementioned steps are completed determines the rate of staff build-up. VITA's urban projects have had very small staffs, usually including a project director, coordinator, office manager, and sometimes a coordinating assistant. Experience has shown that a Coordinator can carry about forty cases at a time.

Staff training: Most staff training will be in-house, on-the-job, therefore, of minimal cost. If VITA or other qualified Volunteers are available to train, costs would be limited to transportation and living expenses. Should contracts be signed with VITA or other training consultants, appropriate budget allocations would be necessary.

Measuring Man Hours: Since the business world turns to consultant hours at so much per hour, it is inevitable that a professional technical assistance service be measured in such terms. While VITA staff, Volunteers, and Requestors agree it is not an adequate yardstick, (see page 21), it appears to grantors as an objective measure of service, something an outsider can relate to, so it becomes a convenient measure for budget and funding purposes.

Note: In practice, Volunteers are asked to keep a record of real time involved in an assignment, including planning. These hours are then multiplied by the average going rate for paid consultants with similar qualifications. Experience has shown that Requestors tend to under estimate the time invested by Volunteers, perhaps because they are inclined to calculate on-site time only. In any case, both the Volunteer and Requestor should be consulted on the computation of time.

Rent: The major consideration here is space for two people constantly telephoning, which they should be able to do comfortably without unduly disturbing each other (200 sq. ft. minimum for Year One).

Additional space (10' x 12') in another room may be needed to house collections of resource materials and offer space for additional staff.

Postage: Six mailings a year to Volunteers and Requestors is a reasonable base for estimating postage. Check with post office for special bulk mail rates for non-profit organizations. [See Appendix III, page 65, for more information about non-profit status.]

Telephone: In a metropolitan area with telephone zones, there must be a realistic appraisal of costs. Because phone communication among Coordinators, Volunteers, and Requestors is the essence of the program, no budget skimping can be permitted. (VITA records indicate that thirty-five calls per case is the average.) An adequate message service is mandatory in offices not staffed full-time; rental of an answering machine might be considered until such staff coverage is possible.

Subscriptions: An information center/library should be developed as the program grows, as mentioned under "Staff training". It is a natural outgrowth of researching areas of Requestor need. Professional journals and major literature in the field of most frequent requests are necessary budget items. The numerous sources of free materials should be fully explored. Again, check local libraries' periodicals listings for additional help.

Reproduction/Printing/Copying: Printed items will include brochures, applications, and Volunteer handbooks. At a later date, a newsletter will be necessary. Any decision to use a "print" or a "duplicate" process will be determined by the cost-range involved. Another possible large expense might be the duplication of materials in the resource collection for distribution to Volunteers and Requestors.

FUND RAISING

The decision to opt for a large-scale program assumes a readiness to allocate 25 per cent of staff time to fund-raising, at least in the initial months of the program. The many and constant pressures in developing and maintaining a TA project may tempt one to assess program efforts as more urgent than fund-raising. Such shortsightedness leads to a situation where the program literally cannot function; although the clients are deliriously happy, there is no money to pay the month's rent and salaries. Hiring a skilled fund-raiser as such may prove expeditious, but a careful search for an expert Volunteer in the field may be a better alternative.

As for resourcefulness, it pays to tap every conceivable source repeatedly. Politics, policies, board members, and egos change. A

rejection from a funding source one year does not preclude acceptance at another time. Incoming Volunteers and support members likewise add possible new contacts, and should be alerted to the program's needs for input in this area.

Since many Requestors are themselves recipients of grants from foundations and other sources, the TA project, in helping these grantees to operate more efficiently and creatively, in effect supports and insures the grantor's investment. This special role can be used as a selling point in seeking monies for volunteer TA delivery systems.

Funding Sources: Foundations, Corporations, Government, Individuals.

Foundations: There are 5,454 foundations listed in the FOUNDATION DIRECTORY, each with its own cause, conditions, and amounts of funding. (Appendix III, page 63). Although local sources will be the prime targets of your fund-raising efforts, a thorough search of the Directory is in order to collect and organize details on familiar sources, to uncover unknown sources whose special conditions for funding may be applicable to one's program.

Corporations: These often seek visible involvement in the community and therefore are frequently responsive to programs initiated and operated at the local level. They often encourage employees to contribute time to volunteer programs, and sometimes allow "free time" for them to do so.

This corporate concern suggests two levels of entry for assistance. Management may be receptive to recruitment of Volunteers within the plant. If the TA program can use such Volunteers, the latter may be willing to approach the parent corporation for funding assistance. A different entry to the corporation (as well as the foundation) is the use of their staff for training sessions on fund-raising. If they lend their talents, these people with first-hand knowledge of the Technical Assistance process will become valuable contacts.

Government Funding: Many articles and reports have been written about federal government grants and contracts, emphasizing their susceptibility to the political scene. Nonetheless, the federal government is a major source of funding; the CATALOG OF FEDERAL DOMESTIC ASSISTANCE (Appendix III, page 64) is a valuable guide. At all times, however, it pays to cultivate local government sources whose loyalty and support of local programs usually outlast the whims of national politics. In addition, the use of local funds encourages local governments to incorporate certain successful assistance programs into the local budget.

An analysis of city budgets as well as networking through contacts in local government will facilitate the development of an in-house file of officials who have the authority to fund local projects.

Individual Donors: Any campaign to solicit donations from individuals or local business interests demands the same careful attention to detail as the formal approach to a foundation. The thrust of the campaign must be determined and certain basic questions answered: What audience is being contacted--carefully selected individuals who agree in principle with the program effort? A broad cross-section of the community? An untried mailing list? What kind of appeal is being made--one that requires a lot of explanation? A simple "help your neighbor" letter? What amount of money can be spent on fund-raising? (Don't overlook the true costs of the campaign, i.e., typing and printing, postage, staff time.) Can any of these items be donated by a local firm in lieu of a cash contribution? Direct mail campaigns generally produce a five to ten per cent return; including a self-addressed envelope can substantially increase this figure.

Policies of Funding Agencies

In general, private capital prefers to match other private capital. They do not relish the role of assuming funding responsibility for phased-out government programs. Foundations frequently seek original demonstration projects and usually make one-time unrenewable grants. Both private and government grants usually run for one-year periods, but there is often a time lag between the commitment of support and the actual delivery of the funds. The necessity for long-range planning and adequate lead-time cannot be over-emphasized.

How to Get the Money

As mentioned earlier, adequate staff is paramount. Applications for money sometimes demand a detailed proposal, or a short letter, and/or an oral presentation. Meetings with potential funds should include a board member and a staff member for the most effective combination of clout and know-how about the program.

Mastering the art of proposal writing can save wear-and-tear on fund-raising crews. Over a period of time it should be possible to develop a more or less standard text that can be adopted to any funding source's requirements.

Assistance for Fund-Raising

VITA Boston has developed a book on fund-raising (Appendix III, page 65). Likewise, VITA volunteer teams have presented workshops on the topic. So tap these sources if local help is not available.

Where appropriate, Requestors--and perhaps Volunteers--may be used as back-up support in fund-raising. Either might be asked to call a funding source to convey his experience with delivering or receiving Technical Assistance.

PUBLIC RELATIONS

Prior references to public relations efforts dealt with those directed to recruiting Volunteers and generating requests for assistance. In addition to these, one needs to prepare a strategy for informing the wider community about the TA program and its services.

Basic Communication Techniques

To be sure of reaching all segments of the community, any public relations program should include suburban and neighborhood newspapers, shoppers' guides, even throw-aways, and the non-establishment publications. Organizational newsletters and church bulletins likewise reach a wide audience.

Access to newspaper space, radio and TV time is most readily obtained via personal contacts. Hopefully, the volunteer roster will produce an entry to the press; if not, special effort should be made to cultivate the interest of key reporters and editors so that they'll take advantage of the good copy potential of a TA program's human interest emphasis.

Relationships with Other Volunteer Programs

A sometimes overlooked facet of the TA project's publicity program concerns other volunteer programs. The introduction of this new service may be perceived as a threat to their operation. The goal of early public relations campaigns is to minimize this false impression of competition by clearly defining the unique contribution the TA program hopes to make, and, to indicate how it plans to interact with existing programs. If sufficient common concern exists, it may be possible to create a special partnership among several groups serving the same segment of the community to avoid duplication of effort and reduce costs. As noted earlier, these organizations are a source of both Volunteers and clients; the importance of their good will cannot be underestimated.

In fact, the Houston VITA office, sensing these problems plus some confusion in the "consumer public" over what agency offers what service, decided to design and distribute a brochure "to describe each organization's use of volunteer Technical Assistance, to show the unique character of each, and to indicate their inter-relationships. VITA Houston felt that such clarification would reveal the benefits derived from one organization complementing the others.

Relationships with the Business Community

Although there's been little static to date, a second possible challenge to a local volunteer TA program might come from the business community. Since many Volunteers recruited typically command \$50-150 per day as paid consultants, independent consultants and

small business (minority) firms might perceive this type of volunteer assistance as "unfair competition" in terms of lost jobs or contacts with requestor organizations. Since the latter could in no way afford to employ such highly paid personnel, the accusation is not valid. A positive interpretation of this issue should be presented to the consultant business community together with evidence showing that many programs aided by free professional Technical Assistance would fail if free service were not available. Of course, judicious selection of cases should preclude infringing on ineligible clients---those who may find it difficult to hire sufficient consultant help, but who do have consultant funds in their budget.

FINAL REMARKS

O.K., you made it--even read that last section! Your tenacity is to be commended.

No doubt you agree at this point that indeed there are some under-used or un-tapped human resources in your community that could (with just the right sort of coordination) be put to good use in solving local problems. So goes the first and major step, a step which soon must be followed with some "just plain hard work" in planning for and implementing that operation (or system) allowing you to make the match between the RESOURCE and the NEED.

This handbook has mapped out a process for building such an operation. You need only to furnish the local plan and "materials".

Good luck with the work!!

APPENDICES

APPENDIX I

VITA CASE STUDIES

DAY CARE

Pre-School Education for the Bilingual Child--Ohio

The staff at the Spanish-American Day Care Center, a community facility serving the Puerto Rican settlement, sought VITA's help in locating a Spanish-speaking consultant with knowledge of funding sources, pre-school curriculum, and the history of Puerto Rican culture. VITA USA in turn contacted the Department of Spanish Surnamed Families at HEW; through this agency two consultants were recruited for on-site work. The first provided extensive information on possible funding sources, and conducted in-service training for the staff with emphasis on additional outside resources such as conferences, seminars on the subject of bilingual, bicultural education. The second, by happy circumstances herself a Puerto Rican, concentrated on development of the pre-school curriculum, analysis of the needs of the individual child, and the involvement of the parents in the center's program. The center has since been funded by HEW. The consultants, now enrolled as new VITA Volunteers, continue to make suggestions about staff training to make maximum use of the program's potential.

C.A.P. Day Care Center--New Jersey

The executive director of the Community Action Program asked VITA for assistance in changing a summer Head Start Program into a three-county year-round day care program. VITA recruited two Volunteers who were familiar with state law to supply advice on procedural changes for the proposed center as well as information on the management, financing, and budgeting of such a program. They have since made additional on-site visits whenever the Requestor feels a definite need for such services.

COOPERATIVES

Housing Development--Maine

A housing development corporation had begun work on assembling 35 units of cooperative housing for sale, and asked for detailed technical assistance in specific areas: management, marketing techniques, site feasibility studies, training for co-op owners. A VITA Volunteer with recent experience in a similar venture was contacted and provided immediate mail and telephone consultation. He also organized a team of five individuals, each knowledgeable in a different facet of

the housing field, to make an on-site visit. Because of this kind of guidance, the program is proceeding on schedule.

Organization & Public Relations--Pennsylvania

A Community Action Agency sponsored a buying club but became dissatisfied with the level of membership participation. A VITA Volunteer, who had previously helped the club set up bookkeeping procedures and so was familiar with both the staff and the project, was asked to work on the problem. A second Volunteer, a specialist in the field of cooperatives, arranged for an on-site conference with both staff and member-clients. The Requestor later reported that the atmosphere around headquarters is much livelier with members offering creative ways for improving the club's image and services.

FUND-RAISING

Workshop for Fund-Raising--Illinois

The fiscal crisis facing social action programs led the state VISTA/ACTION office to request VITA's help in planning a workshop for VISTA Volunteers in the Chicago area. Two VITA Volunteers began by discussing the goals and objectives of such a meeting, then suggested an agenda to deal with them. They later conducted a five-day workshop that covered planning, preparing and writing proposals, packaging proposals, and research to locate potential funders. The feedback from the original Requestor and the participants has been most positive. Requests for similar workshops are coming in from other states.

COMMUNITY DEVELOPMENT

Job Counseling--Ohio

Community Job Development and Referral Services of Cleveland asked VITA for aid in acquiring more effective communication and management skills. A VITA Volunteer from Cleveland University arranged for continuing on-site assistance through a series of training sessions; topics covered included conducting and reporting meetings, techniques of interviewing, future goals and objectives, program planning and implementation, proposal writing and grantsmanship. Both Requestor and Volunteer reported significant progress over the past several months, with further help in proposal writing being scheduled in the near future. The partnership is indeed a success, since the Requestor has obtained a grant of \$250,000 for the project.

Community Center Funding--Maryland

A grass-roots organization needed help in preparing proposals on

various aspects of funding a community center. Two VITA Volunteers from Washington, D.C., are working on different aspects of the request; one is concentrating on a public relations campaign while the other scheduled a proposal writing workshop for the VISTA Volunteers from the area. Both groups felt the two sessions were on target, and the first in a series of fund-raising projects is planned for the near future.

SANITATION

Sewage Disposal--Maine

A craft village would be forced to vacate its location unless an acceptable method of sewage disposal could be devised. There were unusual problems about soil and drainage conditions, and a person with detailed practical experience was not locally available. The nearest VITA Volunteer with appropriate skills had responded to several cases from overseas Requestors, but was hesitant about this assignment, feeling that local engineers would have a better chance of success. He did, however, agree to make a preliminary on-site contact, and became most enthusiastic about both the people and the project. He is now at work designing a system that can be constructed by the local work force.

Sewage Treatment--West Virginia

A Community Action Agency sought VITA's help in the planning and design of a sewage settling pond in a rural location. A civil engineer licensed to practice in the state was required for the project; a VITA Volunteer who happened to chair the Department of Civil Engineering at a state university was a logical candidate for the job. He has begun the review of the plans and the real work will begin as soon as the agency is assured of funding.

SPECIAL EDUCATION

Diagnosis of Learning Disabilities--South Dakota

The youth services office of a local court system asked for VITA's aid in preparing a series of screening tests to determine if individual youths referred to the service were affected by learning disabilities. A VITA Volunteer, an expert in child psychology, contacted the Requestor, then prepared a packet of psychological tests for the program. This approach proved very satisfactory, and a strong working relationship has evolved from the original contact.

Institutional Management & Program-Planning--Vermont

A Requestor wished to establish a special program to provide a home and educational experience for foster care children, and sought VITA's aid in locating a consultant who could advise their board on the actual management of such a facility. Two VITA Volunteers, both with real experience in managing similar programs, provided pertinent information; one was able to schedule an on-site visit. The Requestor then asked for additional help in locating funds for the down payment on the house that will be used for the project. A third VITA Volunteer is supplying that need, and will be available for further consultation as funding becomes available.

BUSINESS & FINANCIAL MANAGEMENT

Rural Transportation--Kentucky

The VITA Information Resources Center and a talented Volunteer worked as a team to supply information on establishing a rural transportation system. The Requestor was thus encouraged to secure the necessary vehicles. He next asked for help on several related topics: incorporation papers, operations costs, scheduling and maintenance systems, etc. A second VITA Volunteer with extensive first-hand experience in operating such a system provided examples of the paper work required--forms, schedule and report sheets, questionnaires, survey and evaluation forms--as well as practical comments about steps to be taken before beginning actual operation. The Requestor has followed these suggestions and is working out trial runs to determine the best operating schedules and efficient management techniques.

Bookkeeping & Accounting--Wisconsin

A VITA Volunteer asked VITA for bookkeeping and accounting assistance for the tribal office of an Indian reservation. Prior to 1973 the Bureau of Indian Affairs had provided this service, but the tribe had since elected to keep its own records. Unfortunately when the tribal bookkeeper left, there was no qualified replacement at hand. A VITA Volunteer, an experienced public accountant, went on-site to set up a general ledger, restructure receipts, reconcile bank balances, etc. This new program has been well accepted, and the Volunteer will be available for further consultation should other problems arise.

APPENDIX II
ORGANIZATIONAL AIDES



VOLUNTEER CONSULTANT RESUME

Return to: VITA

3706 Rhode Island Ave.
Mt. Rainier, Maryland 20822

PLEASE TYPE OR PRINT

OFFICE USE ONLY

<input type="checkbox"/> Ms. <input type="checkbox"/> Mr.	Last Name	First	Middle	Date of Birth
---	-----------	-------	--------	---------------

PLEASE CHECK DESIRED MAILING ADDRESS BUT FILL OUT BOTH

<input type="checkbox"/> RESIDENCE	<input type="checkbox"/> BUSINESS Name
Street	Street
City State Zip Code	City State Zip Code
Phone: Area Code	Phone: Area Code

EDUCATION OR TRAINING (Include particulars)

NATURE OF BUSINESS, PRESENT JOB RESPONSIBILITIES AND PERTINENT PAST WORK EXPERIENCE:

SKILL AREAS (Please describe in detail skill areas in which you are particularly competent. In addition, complete the attached skills list.)

Describe overseas or USA experience, urban or rural, which might help in selection for assignments. (eg., travel, residence). Ethnic background may also be included, if appropriate.

ORGANIZATIONAL AFFILIATIONS (Please do not use initials).

TRAVEL: Would you like to be considered for on-site consultation? <input type="checkbox"/> USA <input type="checkbox"/> Less than 1 month <input type="checkbox"/> Overseas <input type="checkbox"/> More than 1 month	LANGUAGE:	Read	Write	Speak
	Will you translate? <input type="checkbox"/> Yes <input type="checkbox"/> No			

SPECIAL: Are you interested in assisting VITA with:

<input type="checkbox"/> Publicity Efforts	<input type="checkbox"/> Recruiting Volunteers	Contributing to:
<input type="checkbox"/> Fund Raising	Indicate Field:	
<input type="checkbox"/> Photography for Publications	<input type="checkbox"/> Special Projects	

VITA Newsletter
 Other Publications

THANK YOU

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SAMPLE SKILLS LISTINGS FOR MEDIUM-TO-LARGE SCALE
TECHNICAL ASSISTANCE PROGRAM

Accounting/Financial Management	Landscaping
Advertising/Public Relations	Law/Legal Aid
Agriculture--Crop Management, Animals	Library Science
Architecture	Marketing Research
Audio-Visual Equipment	Mathematics/Statistics
Building Materials--Brick, Concrete	Parasite--Prevention & Control
Business Management/Budget Preparation	Personnel Management-- Job Analysis Job Counseling
Communications--Radio, Television, Newspaper, Newsletter	Pharmacy
Community Development	Photography
Construction	Plumbing & Heating
Cooperatives	Poultry Raising
Credit Unions	Prison Reform
Data Processing/Information Systems	Psychology/Sociology
Disease--Prevention & Control	Public Health--Nutrition, Family Clinic, Well Baby Clinic
Economics-Corporate Finance	Pumps & Wells
Education:	Recreation--Playgrounds, Mini-Parks
Curriculum Development	Sanitary Engineering-- Water Supply, Waste Disposal
Day Care--Day Care Centers	Senior Citizens Programs
Pre-school Education	Small Business/Cottage Industries
Primary Education	Technical Writing
Adult Education	Tenants' Rights
Special Education	Transportation
School Planning & Design	Urban Planning & Development
Teaching Aids	Voter Education
Training for Leadership	Welfare Rights
Vocational Training	Youth Programs
Engineering--Chemical, Civil, Industrial, Electrical, Mechanical	
Electricity--Wiring	
Family Planning	
Fire Prevention	
Food Processing--Canning, Freezing, Drying, Preserving	
Fund-Raising/Proposal Writing-- Grantsmanship	
Furniture--Design, Construction, Refinishing	
Gardening	
Graphic/Graphic Arts	
Handicrafts: Jewelry, Pottery, Leather Weaving, Woodworking	
Hospitals--Administration	
Housing: Low-cost, Self-help, Pre-Fab	
Insect-Pest Control	

CONTACT REPORT

Date of Contact: _____
Date of Report : _____
VITA Personnel : _____

PROBLEM TITLE: _____

Name: _____

Identification: _____

Telephone Number: _____

Address: _____

ADDITIONAL COMMENTS:

ACTION TO BE TAKEN:

1. Pick-up Folder _____
2. Send Orientation/Travel Kit to: _____

VOLUNTEER ASSIGNMENT REPORT

Request # _____
Title _____
Date _____

VOLUNTEER MAKING REPORT: Name _____ Phone _____

CONSULTATION GIVEN:

VISITS: From: _____ From: _____
To: _____ To: _____

KEY PERSONS CONTACTED:

Name	Phone or Address
_____	_____
_____	_____
_____	_____

NATURE OF CONSULTATION GIVEN: (Include recommendations made)

OBSTACLES ENCOUNTERED:

RESULTS EXPECTED:

WAS THE ASSIGNMENT WORTHWHILE?

DO YOU FEEL YOU MET THEIR NEEDS?

FURTHER ACTION REQUIRED BY VITA:

ACTION to be taken by: _____ Date _____

ESTIMATE OF TOTAL VOLUNTEER HOURS CONTRIBUTED
(Including travel, preparation, reporting) _____

45

Sample skill card for large-scale program:

NAME & ADDRESS	VV# _____	FILE CODE	
	TELE: _____		
	BUSINESS AFFILIATION _____	DATE IN _____	
	OCCUPATION _____	UPDATED ON: _____	

SKILLS

GEOGRAPHIC EXPERIENCE	<u>LANGUAGE SKILLS</u>	SPECIAL INTERESTS
		Publicity Efforts
		Fund Raising
		Photography
		Recruiting Volunteers
		Workshops/Seminars
		Newsletter
		Training Manuals
		Audio-Visual Aids

PROFESSIONAL SOCIETIES/ORGANIZATIONS

APPENDIX III

ANNOTATED BIBLIOGRAPHY

ANNOTATED BIBLIOGRAPHY

ACTION, ACTION DOMESTIC PROGRAMS FACT BOOK, June, 1974

This hefty volume contains information on all the domestic programs of ACTION, since its establishment in July, 1971, as the voluntary agency to administer federal volunteer programs at home and overseas.

The FACT BOOK is designed to provide current information on volunteer programs and sponsoring organizations. All active domestic programs are included in this directory; the data on the individual programs is arranged alphabetically in community sequence within an individual state.

For additional information, contact: DO/MIS
ACTION
806 Connecticut Avenue, N.W.
Washington, D.C. 20525

Citizen's Energy Conference, WHO'S GOT POWER? A Resource Guide

Annotated listings for information and policy resources for citizen action programs. Covers a broad spectrum of subjects, and is indexed by states.

Order from: Environmental Action Foundation
1346 Connecticut Avenue, N.W.
Washington, D.C. 20036 Tele: (202)659-9682

Foundation Library Center, THE FOUNDATION DIRECTORY

Edition 4 lists 5,454 foundations with fields of interest, income and grant totals, and officers; 1,198 pages. Available in large libraries. \$15.

Order from: Columbia University Press
136 South Broadway
Irving-on-Hudson, N.Y. 10533

Foundation Library Center, THE FOUNDATION GRANTS INDEX, 1973

A cumulative listing of more than 25,000 grants of \$10,000 or more awarded by American philanthropic foundations; 290 pages, \$10.

Order from: Columbia University Press

Foundation Library Center, FOUNDATION NEWS

A bi-monthly newsletter to keep professionals in the foundation

ANNOTATED BIBLIOGRAPHY (cont'd)

field and grant-seeking organizations informed of current developments and trends in giving. \$10 per year.

Order from: Foundation News
P.O. Box 468
West Haven, Connecticut 06516

Foundation Library Center, THE FOUNDATION CENTER INFORMATION QUARTERLY

Updates information from Edition 4 of the Foundation Directory. Also sells computer print-outs of grant listings to fit individual profile of Requestor.

Order from: Columbia University Press
c/o Franklin Rapid Dart
300 Boulevard East
Weehawken, New Jersey 07087

Gale Research Co., ENCYCLOPEDIA OF ASSOCIATIONS, 1973, Vol. 1, \$45; Vol. II, \$28.50

Directory of national associations in the United States; detailed descriptions of national, trade and professional, and other organizations. Available in large public libraries.

Order from: Gale Research Co.
Book Tower
Detroit, Michigan 48226

A, Goldreyer, COMMUNITY DEVELOPMENT SOURCE, 1971; \$1.50

Directory of quasi-public and private agencies concerned with all aspects of community development.

Order from: A. Goldreyer
3851 N. Upland Street
Arlington, Virginia 22007

Government Printing Office, CATALOG OF FEDERAL DOMESTIC ASSISTANCE, 1974; \$7.00

A comprehensive listing and description of Federal programs and activities which provide assistance or benefits to the American public. The primary purpose of the Catalog is to aid potential beneficiaries in identifying and obtaining available assistance. Each program is described in terms of the specific type of assistance provided, the purpose for which it is available, who can apply for it, and how they should apply. It also identifies Federal offices that can be contacted for additional information on the program.

ANNOTATED BIBLIOGRAPHY (cont'd)

Order from: Department of Documents
Government Printing Office
Washington, D.C. 20402

The Source Collective, CATALOG, Communities/Housing, 1972; \$2.95

Locates resource tools (groups, strategies, books, films)
that will enable groups to work effectively on community change.

Order from: Swallow Press
1139 S. Wabash Avenue
Chicago, Illinois 60605

VITA/Mass, MANUAL OF PRACTICAL FUND RAISING: Raising funds for projects
serving low income people, 1974. \$2.00.

This manual covers proposal and budget preparation aides,
hints on approaching foundations, federal sources, resource
foundation lists, and a bibliography on fund-raising.

Order from: VITA
115 Gainsborough Street
Boston, Mass. 02115

NON-PROFIT CORPORATIONS, ORGANIZATIONS, AND ASSOCIATIONS, by Howard Oleck
3rd Edition, 1974. Prentice-Hall, Inc., West Nyack, N.Y. 10994

This is a good source of information on the do's and don't's
involved in setting up a non-profit organization. For more
specific information about the laws in your own state, contact
the state Corporation Commission or similar regulatory agency.

NATIONAL CENTER FOR VOLUNTARY ACTION--Clearinghouse

GREEN SHEETS & PORTFOLIOS

GREEN SHEETS are extensive, updated listings of source groups
and materials, covering all aspects of community development
and human resources. The Portfolios contain samples of a cross-
section of programs in a given area, copies of key materials,
and bibliographies.

Contact: NCVA
1625 Massachusetts Ave., N.W.
Washington, D.C. 20036

ANNOTATED BIBLIOGRAPHY (cont'd)

MISCELLANY:

For assistance in locating former Peace Corps or VISTA Volunteers in your area, contact the following organizations:

The National VISTA Alliance
1404 M Street, N.W.
Washington, D.C. 20005

Independent Foundation
1028 Connecticut Avenue, N.W.
Washington, D.C. 20009

(There are other offices for I.F. in Los Angeles and Minneapolis)

Don't overlook the reference sections in your own local libraries--public, business, or university. The librarians can be enlisted to work on locating very elusive bits of information.

ABOUT THE AUTHOR

VITA, Inc. (Volunteers in Technical Assistance), is a private organization which has operated a volunteer technical assistance program since 1960. Originally only an international assistance program to the developing areas of the world, VITA also entered the domestic scene in 1969. At that time VITA contracted with the Office of Economic Opportunity to develop a demonstration program derived from the hypothesis that VITA's volunteer force could be applied to help solve problems of poverty in the United States.

Since then, principally under the OEO contract and a continuing grant from ACTION/VISTA, the organization has served over 4,000 client agencies across the country, providing them with thousands of hours of professional-level technical assistance, free of charge, in all facets of community and economic development. The experience since 1969 is the base from which this handbook evolved.

VITA- The USA Consulting Service
3706 Rhode Island Avenue
Mt. Rainier, Maryland 20822

VITA-Houston
5401 La Branch
Houston, Texas 77004

VITA-MASS
115 Gainsborough Street
Boston, Massachuset^t ; 02138

VITA-COLORADO
Suite 480
1515 Arapahoe
Denver, Colorado 80202

This publication was compiled and edited by Annette Goldreyer, Steven Steadham and Doris McCauley.