

B. MANAGEMENT AND OPERATIONS

Topic	B. 1. Manage or oversee projects
Skill Level	Indicators
<p align="center"><i>“Novice”</i> Acquire basic vocabulary and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Follow an established protocol for a project <input type="checkbox"/> Conduct a project <input type="checkbox"/> Document outcomes using a template <input type="checkbox"/> Count the outputs
<p align="center"><i>“Intermediate”</i> Apply skills and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Identify need for project <input type="checkbox"/> Develop relevant activities or interventions to meet the need <input type="checkbox"/> Plan, design, and conduct a project <input type="checkbox"/> Create objectives and measures to gauge the success of the project
<p align="center"><i>“Advanced”</i> Plan, Do, Study, Adapt (PDSA)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Analyze processes and outcomes <input type="checkbox"/> Adjust project or program activities as a result of analysis <input type="checkbox"/> Undertake new projects or activities to reflect learning from project evaluation
<p align="center"><i>“Expert”</i> Apply knowledge in a range of contexts</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Align activities and projects with agency mission and goals <input type="checkbox"/> Leverage activities and projects to strengthen the sponsoring organization <input type="checkbox"/> Disseminate information about project results to intern and external stakeholders <input type="checkbox"/> Replicate and adapt project to new settings

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Topic	B. 2. Develop and manage financial processes
Skill Level	Indicators
<p align="center"><i>“Novice”</i> Acquire basic vocabulary and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Understand laws regulating nonprofit financial management <input type="checkbox"/> Monitor expenditures against a program specific budget <input type="checkbox"/> Know the financial sources of program support <input type="checkbox"/> Understand In Kind Contributions <input type="checkbox"/> Document reporting and tracking of expenditures
<p align="center"><i>“Intermediate”</i> Apply skills and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Apply laws regulating nonprofit financial management <input type="checkbox"/> Develop a rudimentary budget by connecting program goals and activities to anticipated expenses <input type="checkbox"/> Know essential cost elements of program operations
<p align="center"><i>“Advanced”</i> Plan, Do, Study, Adapt (PDSA)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Analyze trends of budget and expenditures <input type="checkbox"/> Adapt spending patterns to reflect budgetary realities <input type="checkbox"/> Identify and obtain alternate sources of funding <input type="checkbox"/> Develop a comprehensive budget in compliance with federal, state, or private grant guidelines
<p align="center"><i>“Expert”</i> Apply knowledge in a range of contexts</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Advocate for adequate funding to support continued viability of volunteer management program <input type="checkbox"/> Justify the value added of the volunteer program in terms of the expenditure required to maintain a quality program <input type="checkbox"/> Pursue financial sustainability

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Topic	B. 3. Manage technology
Skill Level	Indicators
<p align="center"><i>“Novice”</i> Acquire basic vocabulary and knowledge</p>	<p><input type="checkbox"/> Facility with basic computer technology (e.g. word processing, spreadsheet, database, email and internet)</p> <p><input type="checkbox"/> Capable of record keeping for volunteer management</p>
<p align="center"><i>“Intermediate”</i> Apply skills and knowledge</p>	<p><input type="checkbox"/> Use technology to document volunteer activities such as training, service delivery and monitoring (e.g. web based reporting systems, eGrants, volunteer management software)</p>
<p align="center"><i>“Advanced”</i> Plan, Do, Study, Adapt (PDSA)</p>	<p><input type="checkbox"/> Analyze trends resulting from data collected using computer software and web based tools</p> <p><input type="checkbox"/> Adapt computer tools and applications to meet needs of the program</p>
<p align="center"><i>“Expert”</i> Apply knowledge in a range of contexts</p>	<p><input type="checkbox"/> Identify, obtain and apply appropriate technology to manage volunteers and the program</p>

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Topic	B. 4. Manage risk
Skill Level	Indicators
<p align="center"><i>“Novice”</i> Acquire basic vocabulary and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Understand laws regarding volunteer liability <input type="checkbox"/> Identify existing risk management policies in agency, program, and placement site <input type="checkbox"/> Understand key elements of risk management (avoidance, prevention, reduction, and control) <input type="checkbox"/> Implement process of risk assessment
<p align="center"><i>“Intermediate”</i> Apply skills and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Assess for consistency the risk management policies of agency, program, and placement site <input type="checkbox"/> Assess adequacy of insurance products (workers compensation, health insurance, general liability and vehicle insurance) <input type="checkbox"/> Anticipate potential risks for program, volunteers, and beneficiaries <input type="checkbox"/> Ensure that volunteers have adequate protection against potential risks
<p align="center"><i>“Advanced”</i> Plan, Do, Study, Adapt (PDSA)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Develop a crisis management plan that reflects a trend analysis of reasonable risks associated with the program and the volunteers <input type="checkbox"/> Analyze the gaps in coverage and likelihood of occurrence of potential risks of managing a volunteer program
<p align="center"><i>“Expert”</i> Apply knowledge in a range of contexts</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Implement a crisis management plan <input type="checkbox"/> Adapt and align risk management policies and procedures between the program/project and the agency <input type="checkbox"/> Advocate for supporting the risk management planning and implementation in the agency

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Topic	B. 5. Develop & maintain record keeping & documentation system
Skill Level	Indicators
<p align="center"><i>“Novice”</i> Acquire basic vocabulary and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Use a record keeping system that documents activities and progress towards goals <input type="checkbox"/> Compile data in response to program requirements
<p align="center"><i>“Intermediate”</i> Apply skills and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Understand a performance measurement system for assessing program results <input type="checkbox"/> Understand the relationship between maintaining sufficient documentation and managing risk
<p align="center"><i>“Advanced”</i> Plan, Do, Study, Adapt (PDSA)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Understand the logic model as a tool for managing program activities and linking to program outcomes <input type="checkbox"/> Analyze the validity of program activities <input type="checkbox"/> Develop a cost effective and comprehensive documentation system that facilitates compliance and provides meaningful results
<p align="center"><i>“Expert”</i> Apply knowledge in a range of contexts</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Design program evaluation based on desired outcomes of the program <input type="checkbox"/> Adapt program design to reflect outcomes of performance measurement data and program evaluation <input type="checkbox"/> Articulate and communicate benefits of program activities to internal and external stakeholders

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Topic	B. 6. Manage quality
Skill Level	Indicators
<p align="center"><i>“Novice”</i> Acquire basic vocabulary and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Comply with requirements imposed by agency and professional standards <input type="checkbox"/> Recognize qualitative and quantitative data that provides valuable information about program value <input type="checkbox"/> Understand vocabulary and tools for quality management (e.g. TQM Total Quality Management, and Continuous Quality Improvement)
<p align="center"><i>“Intermediate”</i> Apply skills and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Describe the process for gathering data and assessing outcomes <input type="checkbox"/> Recognize the components of quality service (i.e. Is the service responsive to community need? Do key stakeholders value it? Is it consistently delivered? Does it go beyond minimum standards?)
<p align="center"><i>“Advanced”</i> Plan, Do, Study, Adapt (PDSA)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Identify cause and effect relationships in processes related to managing operations <input type="checkbox"/> Analyze results to identify where change needs to be made or to build on success
<p align="center"><i>“Expert”</i> Apply knowledge in a range of contexts</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Adapt processes or operating procedures to reflect the results of the analysis <input type="checkbox"/> Align and adapt processes to ensure that quality criteria are met or exceeded

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Topic	B. 7. Develop and revise policies, processes, and procedures
Skill Level	Indicators
<p align="center"><i>“Novice”</i> Acquire basic vocabulary and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Know current policies, processes, and procedures for the program, agency and placement site <input type="checkbox"/> Identify sources of information for samples or templates for policies, processes, and procedures
<p align="center"><i>“Intermediate”</i> Apply skills and knowledge</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Develop relevant policies, processes, and procedures to reflect volunteer and program activities <input type="checkbox"/> Develop policies, processes, and procedures that incorporate the changing profile of the volunteer pool (i.e. Baby Boomers, persons with disabilities)
<p align="center"><i>“Advanced”</i> Plan, Do, Study, Adapt (PDSA)</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Analyze policies, processes, and procedures to meet the standard of best practices in the field of volunteer management
<p align="center"><i>“Expert”</i> Apply knowledge in a range of contexts</p>	<ul style="list-style-type: none"> <input type="checkbox"/> Ensure that policies, processes, and procedures of the volunteer management program are aligned with those of the program, agency and placement site.