Action

to

Research

From

A unified

national response

to the 2004

Volunteer Management

Capacity Study

October 2004

NATIONAL
HUMAN SERVICES
ASSEMBLY

This document is the culmination of significant stakeholder dialogue and discussion. Following the release of the first briefing report in February 2004 a number of steps were taken to disseminate the findings to the field and solicit feedback on the 2004 Urban Institute Study of Volunteer Management Capacity:

- An initial forum when the research was unveiled;
- The volunteerinput.org website to gather comments from the field;
- Focus group discussions in a number of venues around the nation;
- Individual conversations with key leaders, stakeholders and experts in the field; and
- A review of publications and previous efforts related to volunteer management capacity building.

At the 2004 National Conference on Community Volunteering and National Service a draft concept paper was discussed and modified by leaders involved in and concerned about volunteerism in America—researchers, volunteer administrators, trainers, intermediary organizations, foundations, practitioners, and others. This conversation was convened by The UPS Foundation, Corporation for National and Community Service, USA Freedom Corps, and National Assembly of Health and Human Service Organizations and was facilitated by Douglas Brookman of Public Solutions, Inc.

This report was prepared by Katherine H. Campbell, CVA, serving as a consultant to the National Assembly.

Introduction

A window of opportunity has been opened with the publication of a recent study, *Volunteer Management Capacity in America's Charities and Congregations*. The report provides the first substantive information about how nonprofits and congregational social service outreach programs are equipped to manage and support their volunteer resources. The findings document the significant challenges many organizations face to maximize the volunteers they depend upon:

Volunteer Management Capacity Study: Summary of Key Findings

Four in five charities use volunteers. Of the approximately 215,000 charities that filed Form 990 or 990EZ with the IRS (required of those charities with over $25,000 in annual gross receipts), an estimated 174,000 organizations use volunteers.

One in three congregations manage volunteers in their social service programs. Of an estimated 380,000 congregations, 129,000 run social service programs and manage volunteers in those programs.

Nine in ten charities cited that volunteers brought benefits to their organization. Two-thirds of charities indicate that their volunteers provide substantial cost savings and greatly increase the quality of services or programs provided, while only six percent of charities and congregational social service outreach programs report that absenteeism, unreliability or poor work habits are a big problem among their volunteers.

The median charity reported that an hour of a typical volunteer's time was worth $20. If this finding is accurate, then the two in five charities that report that their volunteers work 50 or more hours in a typical week receive a benefit of at least $1,000 a week or $52,000 a year from their volunteers.[1]

Three out of five charities and only one out of three congregations with social service outreach activities **reported having a paid staff person who worked on volunteer coordination**; among these paid volunteer coordinators, **one in three have not received any training in volunteer management**, and **half spend less than 30% of their time on volunteer coordination.**

Few charities and congregations have **adopted to a large degree the nine volunteer management practices identified as best practices.**

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[1] *This dollar value is greater than the annual calculation by the Independent Sector, which computes an average hourly wage for a volunteer's time by taking the average hourly wage of nonagricultural workers and adding 12 percent increase for fringe benefits. By this calculation, the typical 2002 volunteer value was $16.54 per hour.*

More than **nine in ten organizations are ready to take on more volunteers at their present capacity**, with a median of 20 new volunteers. Without any capacity enhancements, charities report they could take on an estimated 3.4 million new volunteers and congregational social service programs say they could take on an estimated 2.5 million new volunteers.

The **percentage of time a paid staff volunteer coordinator devotes to volunteer management** has a strong and statistically **significant relationship with the capacity of organizations** to take on additional volunteers.[2]

The best prepared and most effective volunteer programs are those with paid staff members who dedicate a substantial portion of their time to **management of volunteers.** This study demonstrated that as staff time spent on volunteer management increased, adoption of volunteer management practices increased as well.

With a moderate, positive relationship between investment in volunteer management and the perceived benefits of volunteers, the study concludes that **investments in volunteer management and benefits derived from volunteers feed on each other**, with investments bringing benefits and benefits justifying greater investments.

The most **prominent challenge to implementing volunteer programs** among charities and congregations **was recruiting volunteers during the workday**, reported among 25 percent of charities and 34 percent of congregational social service outreach programs. This suggests that groups interested in promoting volunteerism should explore ways to create more flexible workdays for potential volunteers with regular jobs.

While one in three charities partner with religious organizations, **charities that partner with religious organizations** are more likely to: report a large number of volunteers annually who collectively contribute over 50 hours a week; claim greater levels of benefit from their volunteers than charities without these ties; and **have more investment in volunteer management** than charities that do not collaborate with religious organizations.

The most popular capacity building option among both charities and congregations with social service outreach activities was the addition of a one year, fulltime volunteer with a living stipend, such as an AmeriCorps member, with responsibility for volunteer recruitment and management. AmeriCorps members could be particularly useful in charities lacking an adequate supply of volunteers or appropriate volunteers for the work required but also in those that do not have time or money to train and supervise volunteers.

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[2] $y = 0.391$

Many charities and congregations **struggle with finding a sufficient number of volunteers**. Roughly 40 percent report that more information about potential volunteers in the community would greatly help their volunteer program, highlighting the important role that volunteer centers and other community information resources can play in linking people who want to volunteer with organizations that need them.

Training staff on how to work with volunteers can address a range of challenges, including recruiting volunteers available during the workday; lack of paid staff time to train and supervise volunteers; lack of adequate funds for supporting volunteers; and absenteeism, unreliability, or poor work habits by volunteers.

How This Document Was Developed

The initial briefing report begins to suggest areas that need further capacity building attention, and serves as a solid launching pad for more dialogue, research and action. Indeed, leaders and practitioners in the field have responded to the study with the question, **"So now what? How can we address some of the historic barriers that have limited the impact of volunteer involvement for decades?"**

This document presents a set of recommendations to do that. It is a highly collaborative, strategic, reality based plan for future action toward a common goal: increasing the ability of nonprofits and congregations to mobilize, manage and maximize their volunteer resources on behalf of America's communities.

Following the release of the first briefing report, which can be found at volunteerinput.org, in February 2004, a number of steps were taken to disseminate the findings to the field and solicit feedback via:

- An initial forum on February 19th, when the research was unveiled;

- The *volunteerinput.org* website to gather comments from the field;

- Focus group discussions in a number of venues around the nation; and

- Individual conversations with key leaders, stakeholders and experts in the field.

Based on the information and comments collected, and a review of publications and previous efforts related to volunteer management capacity building, a concept paper was drafted. At the 2004 National Conference on Community Volunteering and National Service a diverse group of leaders discussed the proposed recommendations, suggested modifications, and began identifying potential action steps toward implementation. The culmination of significant stakeholder dialogue and discussion is a concrete plan to translate research into action.

A Definition

For the purposes of this document, the term "volunteer management capacity" is defined as consisting of two elements:

1. Resources to support volunteer involvement such as significant staff time devoted to the function of volunteer resources management and dedicated financial support; and

2. Adoption of policies and practices which promote effective involvement of volunteers and minimize barriers, e.g., role descriptions, screening, and supervision.

Guiding Philosophy

- The approach taken in this document is one of identifying *a few transformative strategies* to create systemic change, rather than multiple smaller actions with less long term impact. This approach does not negate the value of past or current capacity building actions by individual organizations in the field. We encourage all stakeholders to use the Volunteer Management Capacity Study to support their related work. However, the focus of these recommendations is on what can be *accomplished through large scale, collaborative action.*

- The strategies are *interrelated* and somewhat *interdependent.* Ideally, several could and should occur simultaneously, although some sequencing may be helpful and necessary.

- The intent is to implement strategies which will relate to and strengthen the *full range of organizations involved in volunteerism.* This means small, medium, and large nonprofits…all-volunteer organizations…rural, suburban and urban settings…federal, state, and local levels of government…small, medium, and large businesses.

- Although *government* agencies were not included in the scope of this particular study, previous research and comments from the field indicate that the public sector faces many of the same challenges when it comes to volunteer management capacity. The strategies recommended here will address their needs as well, and government managers should be included as implementation partners. Government is also a supplier of volunteers (its employees) and a funder of volunteer projects and capacity building efforts.

- Underlying all these recommendations is the need for increased public and private *funding to support volunteer management* at many levels— nationally, locally and within organizations. Several of the strategies will indirectly lead to increased awareness and investment, especially if funders are active partners in the dialogue and implementation.

- While one national organization or entity will probably need to take the lead on each strategy, all strategies *require a collaborative approach* to be effective. With this in mind, key potential partners are identified for each strategy.

- These recommendations call upon all constituencies and entities with an interest in building volunteer management capacity to *move beyond organizational self interest* and seize this opportunity to work together. Significant change will happen only by combining expertise, resources, and spheres of influence.

It is helpful to consider the recommendations in this report within the larger context of two conceptual frameworks:

1. Organizational – the dynamics at work within a nonprofit or government entity which involve volunteers

2. Systemical – the complex forces and variables which influence the scope and quality of citizen engagement in volunteering

Each is described and illustrated below.

The Organization:
Relationship between Investment and Impact

The ultimate goal of nonprofit or government organizations is to create desired results (IMPACT) in the lives of individual people, in communities, and/or the nation.

In organizations which utilize volunteers as one of several resources to accomplish their mission, the degree and quality of IMPACT is affected by two factors:

- How the organization's leaders view, direct and support volunteers as a resource to accomplish important work of the organization (INVESTMENT IN MANAGEMENT); and

- How the volunteers feel about their involvement in that organization, which in turn determines whether they do a good job, stay involved, expand their support, and continue volunteering (INVESTMENT IN THE VOLUNTEER EXPERIENCE).

IMPACT
(meeting needs, improving the community, affecting change)

INVESTMENT IN MANAGEMENT

INVESTMENT IN THE VOLUNTEER EXPERIENCE

(leadership, support, organizational culture, role assignments, policies)

In order to achieve the maximum desired impact, organizations must pay equal attention to ensuring that work gets done well *and* that volunteer behavior is positively reinforced through a good experience. They must invest in creating internal systems, leadership and an organizational culture that will focus the work of volunteers and enhance satisfaction. If one part of the equation is forgotten or ignored, the quality of the results will be diminished. Thus, the goal of capacity building must be to strengthen both aspects.

This line of reasoning also raises the issue of quantity vs. quality: *Is more necessarily better?* It is tempting to assume that having more volunteers or more hours of service equates to increased capacity. However, if the work is not managed effectively and efficiently, or if the volunteer experience is not viewed as worthwhile and satisfying, then community impact and value is actually diminished. More volunteers can create more problems if management capacity is lacking.

The System: Supply, Demand and Management Capacity

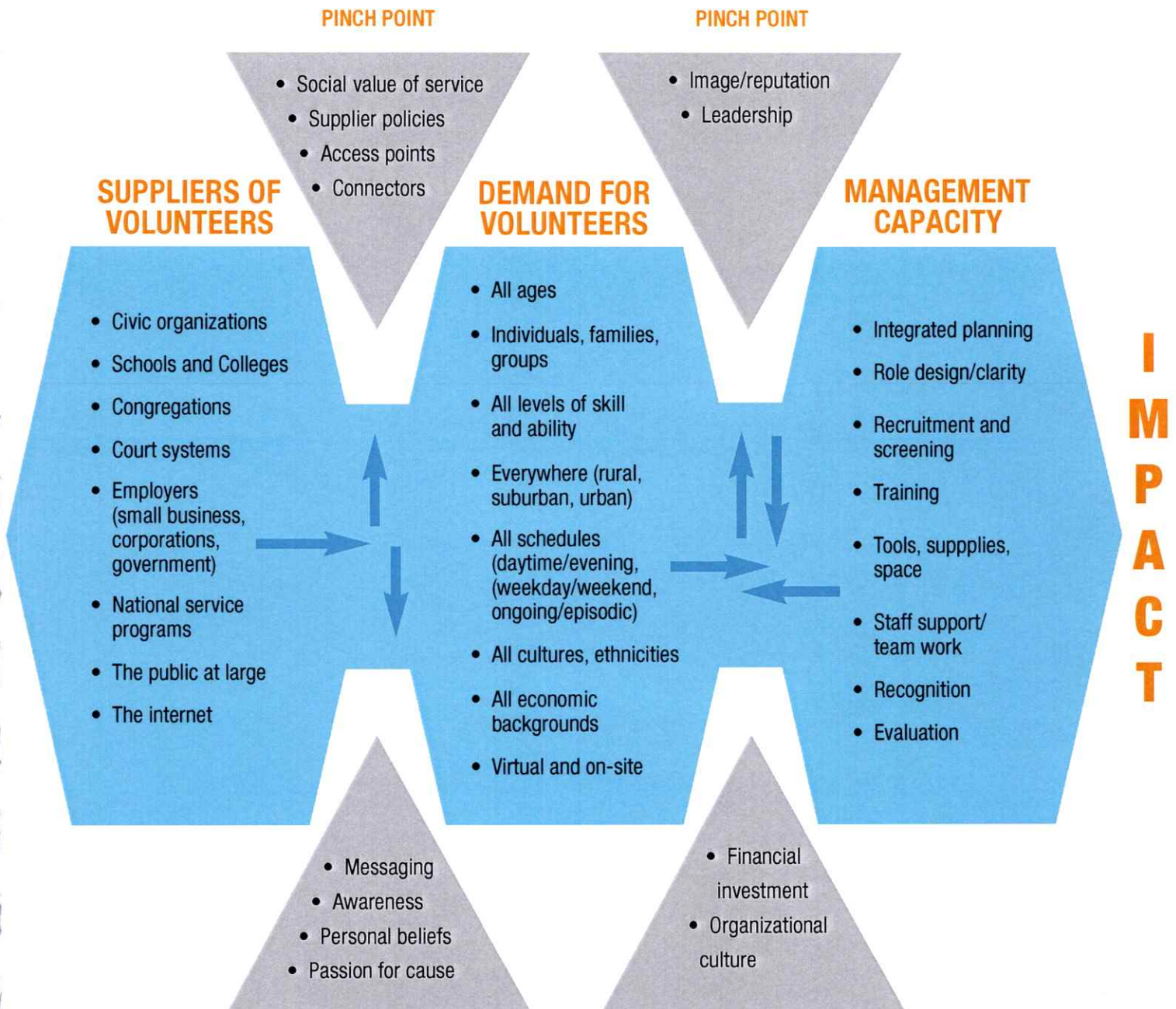Our nation's system of organized volunteering consists of several components:

1. SUPPLIERS – those entities that are sources of potential volunteers, encouraging or requiring individuals to contribute time to service activities; also the general public, individuals who are not necessarily affiliated with a group but who respond independently and as entrepreneurs;

2. DEMAND – the need for the services of volunteers to accomplish important work on behalf of organizations and communities; and

3. MANAGEMENT CAPACITY – the ability of organizations to receive and deploy volunteers in order to achieve desired results.

This system can be portrayed as a giant pipeline, channeling potential human energy and motivation into constructive activity for the collective good. Ideally, the system produces enough of the right volunteers available at the right time and place to meet the need for services and yield the desired impact. However, this flow of volunteers to meet the demand and yield the desired impact is affected by several factors:

- public messaging about who can volunteer, the benefits of doing so, and the relevance to each individual's personal frame of reference (cultural, ethnic, generational);

- the degree to which supplier policies and practices either reduce or create barriers to volunteer involvement;

- the number of access points to connect volunteers with opportunities;

- the range of options for getting involved (types of work, levels of responsibilities, scheduling);

- the degree to which the volunteer management capacity of "user" organizations stifles or promotes effective volunteering.

Thus, systemic capacity building must address these "pinch points" of potential constriction in order to maximize the potential of volunteer involvement.

PINCH POINT

- Social value of service
- Supplier policies
- Access points
- Connectors

PINCH POINT

- Image/reputation
- Leadership

SUPPLIERS OF VOLUNTEERS

- Civic organizations
- Schools and Colleges
- Congregations
- Court systems
- Employers (small business, corporations, government)
- National service programs
- The public at large
- The internet

DEMAND FOR VOLUNTEERS

- All ages
- Individuals, families, groups
- All levels of skill and ability
- Everywhere (rural, suburban, urban)
- All schedules (daytime/evening, (weekday/weekend, ongoing/episodic)
- All cultures, ethnicities
- All economic backgrounds
- Virtual and on-site

MANAGEMENT CAPACITY

- Integrated planning
- Role design/clarity
- Recruitment and screening
- Training
- Tools, suppplies, space
- Staff support/ team work
- Recognition
- Evaluation

IMPACT

- Messaging
- Awareness
- Personal beliefs
- Passion for cause

- Financial investment
- Organizational culture

Format of Recommendations

This report is organized around four themes:

Communication and Messaging
Connecting People to Opportunities
Organizational Readiness and Management
Building Knowledge

These themes reflect the critical leveraging points for building capacity in the system that has been described.

• There are eight recommended strategies for action, some of which address more than one theme.

• A list of issues and key findings related to each theme is provided and serves as a rationale for the recommended strategies.

• Because collaboration is essential to the success of each strategy, a list of _suggested_ partners is included.

• Based on work done by the group of leaders convened at the National Conference in early June, suggested first steps toward implementation are also included for each strategy.

Theme: **COMMUNICATION AND MESSAGING**
Related Issues
Key research findings
Strategy #1:   _Messages and advocacy to user organizations_
Strategy #2:   _Messages and advocacy to supplier organizations_
Strategy #3:   _Relevant professional career paths_
(_Strategy #7 also supports this theme_)

Theme: **CONNECTING PEOPLE TO OPPORTUNITIES**
Related Issues
Key research findings
Strategy #4:   _Additional local "connectors"_
(_Strategy #6 also supports this theme_)

Theme: **ORGANIZATIONAL READINESS AND MANAGEMENT**
Related Issues
Key research findings
Strategy #5:   Core competencies, standards and curriculum
Strategy #6:   Use of national service participants
(_Strategy #1_ also supports this theme)
(_Strategy #7_ also supports this theme)

Theme: **BUILDING KNOWLEDGE**
Related Issues
Key research findings
Strategy #7:   Focus on evaluation and impact measurement
Strategy #8:   National research agenda

COMMUNICATION AND MESSAGING

Related Issues

- The need for internal advocacy to boards of directors, executive directors and other top level organizational leaders regarding the value of investing in the management of volunteers and the adoption of best practices.

- The need to utilize supplier organizations to educate all Americans about the benefits (for the community and the individual) of both episodic and longer term involvement, scheduling options and the full array of choices of settings.

- The need to change supplier policies and practices which result in barriers to volunteer involvement by the individuals they represent.

- The need to increase the visibility and credibility of volunteer management as a legitimate professional function within the nonprofit and government sectors.

Key Volunteer Management Capacity Study Findings

- The demand for volunteers is high, and many charities and congregational social service programs struggle with finding a sufficient number of volunteers.

- One of the most prominent challenges to implementing volunteer programs among charities and congregations is recruiting volunteers during the workday. This was reported as a big problem by 25 percent of charities and 34 percent of congregational social service outreach programs.

- The greatest challenge that charities and congregations face is an inability to dedicate substantial staff resources to volunteer management. Only three out of five charities reported having a paid staff person who worked on volunteer coordination.

"This is an industry of relationships and people. And the core value that seems to be missing is that volunteer managers are human resource managers, worthy of the same rights, responsibilities, outcome measures, and professional position in the agency."

Mary Foley, Chair, Volunteer Center National Network

MESSAGES AND ADVOCACY TO USER ORGANIZATIONS

What:

Develop messages and advocacy strategies for influencing boards, executive directors and government officials to invest organizational resources in volunteer management and supervision. These messages need to address the "investment formula" concept, articulating the ways in which organizations benefit from adequately supporting their volunteer resources through polices, structure and daily operations. In addition, specific practical strategies must be identified for how individuals within these organizations can become change agents.

Once developed, the messages and strategies must be communicated:

- by functional areas and professional associations (board members, executive directors, finance officers, program staff);

- by settings/industries (arts, social service, health care, corrections, environment, education, congregations);

- by national resource organizations (Board Source, Independent Sector, ASAE); and

- by community foundations and other funders to leverage their investment.

This strategy might also include actions steps aimed at promoting volunteer resources management in the broadest sense so that it is more widely recognized as a legitimate management profession and career choice.

Who:

- Experienced practitioners in volunteer resources management
- Board member volunteers and executives who can help educate their peers
- Finance and fund development staff
- Representatives of organizations from varied sizes and settings
- Community foundations and other funders
- Policy makers
- Associations of nonprofits
- A national marketing and/or public relations firm to develop techniques and strategies based on content provided by field experts and/or consumers

Potential First Steps:

- Identify key issues that are relevant to this audience
- Identify champions who will be peer communicators
- Develop strong "stories" of volunteer impact (informed by Strategy #7)
- Develop key messages

MESSAGES AND ADVOCACY TO SUPPLIERS

What:

Develop message and advocacy strategies to influence the policies and practices of volunteer supplier organizations. These organizations control access to large numbers of volunteers, yet their well meaning intent is often mixed with behavior that creates barriers to involvement, generating frustration and negativity among agencies who need the help as well as among the volunteers themselves. The result is a restricted flow, an imbalanced supply and demand, and consequently limited impact.

Employers (Business and Government)

- adopt policies that support workers who want to include volunteering in their workday

- recognize employees for their involvement, even if it is not company sponsored activity

- communicate with nonprofits to determine how specific unmet needs for volunteers can be addressed within the scheduling constraints of both

- provide retirees with information about the range of volunteer involvement options

Schools and Higher Education

- educate students about the advantages of both episodic and lengthier service

- provide parents and students with adequate information about how to find a good volunteer opportunity

- discuss the school's expectation of a service experience with local nonprofits to ensure the desired results

Congregational Outreach Programs

- make congregations aware of local/regional opportunities to learn about effective volunteer management

- increase the dialogue between congregation members and nonprofits that need their help, to explore how more effective partnerships can be developed

Obviously, each type of supplier has unique characteristics and interests that must be addressed. One type of policy and advocacy will not fit all. But there are common messages which all potential volunteers need to hear and understand, and these supplier entities provide critical communication channels.

This does not negate the fact that many individuals, especially young people, volunteer independently from any of these supplier organizations. However, the suppliers are the key to reaching the majority of potential volunteers.

Who:

- Representatives from each supplier group – leaders and potential volunteers
- Practitioners in volunteer resources management
- Nonprofit executives
- Government managers
- Volunteer centers
- A national marketing and/or public relations firm with expertise in developing public education (messaging) and policy change (organizational behavior) campaigns

Potential First Steps:

- Identify experts in developing this type of campaign
- Identify appropriate individuals for task force participation
- Draft case statement for funding

3 Strategy Transformational

RELEVANT PROFESSIONAL CAREER PATHS

What:

Identify and promote career path options that demonstrate how the skills of volunteer resources management relate to other roles in nonprofit and government organizations. This includes examining related competencies (as identified in Strategy # 5) and making the case for how they are valuable and relevant to a range of positions including:

- Contributions management
- Fundraising
- Human resources
- Community development
- Public policy
- Nonprofit management (executive directors, CEOs)
- Foundation program officers
- Teaching/training
- Consulting
- Writing
- Coaching/mentoring
- Career options in volunteer development

This strategy should also explore how careers in volunteer resources management might be encouraged through higher salaries, more consistent job titles, specific professional development opportunities and related research.

Desired results of this strategy include:

- reducing the current high turnover rate in volunteer management positions by demonstrating that it is not a dead end role;

- assisting promising individuals to enhance their careers and continue adding value to the field of volunteerism;

- seeding future generations of leaders, authors and consultants;

- reinforcing the similarities between volunteer resources management and other respected professions; and

- legitimizing continual learning and professional development activities.

Who:

- Experienced practitioners like AVA members
- Consultants and trainers
- Representatives from related fields/professions
- Academics (American Humanics and others)
- Career counselors via their national association

Potential First Steps:

- Conduct inventory of existing literature
- Create a case statement
- Reach consensus on core competencies
- Gather and promote stories of effective volunteer managers who have moved "up" and "across" to related roles

CONNECTING PEOPLE TO OPPORTUNITIES

Related Issues

- The need for intermediary entities in *all* communities to connect potential volunteers to the full range of service options.

- The need for adequate direct supervision of volunteers, especially in situations such as groups of young volunteers, high risk volunteer roles, or services to vulnerable clients.

- The need to ensure that volunteers have positive experiences that reinforce continued involvement.

Key Volunteer Management Capacity Study Findings

- The demand for volunteers is high and many charities and congregational social service programs struggle with finding a sufficient number. .

- One of the most prominent challenges to implementing volunteer programs is recruiting volunteers during the workday, an issue reported by 25 percent of charities and 34 percent of congregational social service outreach programs.

- Community intermediaries can play an important role in bridging the gap between volunteers and volunteer opportunities. Roughly 40 percent of charities and congregations report that more information about potential volunteers in the community would greatly help their volunteer programs. Volunteer centers and/or other community organizations could be crucial in linking people who want to volunteer with organizations that need them.

- Charities that partner with religious organizations report a larger scope of volunteers and greater organizational benefits.

ADDITIONAL LOCAL CONNECTORS

What:

Create and pilot models for identifying alternative local connectors where there is currently no volunteer center, especially in small rural communities. This recommendation does not in anyway diminish the value and role of the 350+ volunteer centers as they now exist. Rather, it serves to expand that network and can also provide a safety net for existing centers that are struggling to remain viable. In addition, models of existing volunteer centers which have been sustainable should be widely shared. The intermediary function and role is important for capacity building in terms of promotion, referral, management training, and being a catalyst for addressing local needs. Every community needs this function to be in place, whether it is a free-standing entity or part of another organization. It does not matter where this function is housed, as long as it works.

This strategy must also acknowledge the increasing role of technology as a connector that requires minimal local support. There are indications that this may ultimately change the function of volunteer centers. Models should be explored that respond to such growing trends among those seeking volunteer opportunities.

Potential entities to be explored to house the connector function include:

- community colleges or universities
- libraries
- community centers
- community action agencies
- chambers of commerce
- information and referral centers
- local governments
- civic organizations
- school districts
- local leadership organizations
- county extension service

To be effective, a connector entity ideally:

- Has a strong presence in the community and is familiar to many residents;
- Is regarded as accessible;
- Has training and technical assistance capacity (or access to it), including distance learning;
- Is a place where public and private interests intersect;
- Is passionately committed to promoting and supporting citizen engagement, collaboration and volunteerism;
- Is nonpartisan;
- Has a positive reputation; and
- Is sustainable over the long term.

> "Every community of any size ought to have an intermediary organization that efficiently and effectively links potential volunteers to appropriate volunteer activities."
>
> *Bill Galston, Executive Director, National Commission on Civic Renewal*

Who:

- Points of Light Foundation and Volunteer Center National Network
- Representatives from the types of organizations listed above
- Community foundations
- Local and state government entities such as the National Association of Counties

Potential First Steps:

- Identify what it takes to start this function in a new location
- Conduct a survey to identify opportunities, efficiencies, underserved areas
- Identify the range of volunteer center models that are currently sustainable

Theme:

ORGANIZATIONAL READINESS AND MANAGEMENT

Related Issues:

- The need for more accessible, affordable training for volunteer resources managers.

- The need to help organizations develop internal systems which support volunteer involvement.

- The need to develop this function into a recognized and valued management profession.

- The need to include volunteer related subjects in the professional training and technical assistance of those whose careers require them to work with volunteers even if they are not volunteer resources managers.

- The need to ensure an adequate supply of competent volunteer resources managers (both paid and volunteer) to meet the needs of nonprofit organizations and congregational social service outreach programs.

- The need to help organizations design volunteer roles/positions that match the types of schedules, skills and backgrounds that fit the available supply of volunteers.

- The need to help organizations recruit and retain potential volunteers.

- The potential for utilizing national service participants to supplement the need for additional staffing in volunteer resources management.

5 **Strategy** Transformational

CORE COMPETENCIES, STANDARDS AND CURRICULUM

What:

Harness the current body of knowledge around effective volunteer resources management into a set of agreed upon standards that include defining the minimal, basic requirements and competencies. This then becomes a core curriculum, a generally accepted foundation for all related training and courses. It should be developed by individuals representing several organizations and perspectives, using the methodology of other professions that have successfully gained credibility in recent years like fundraising and human resources.

Multiple lead agencies currently deliver training and technical assistance for volunteer management. This strategy calls for a joint effort to identify the assets of each organization and build upon existing course curricula and job analysis studies. Collaboration is now imperative to meet the demand, maximize efficiencies, make better use of the scarce funding resources and avoid duplication.

Special consideration should be given to developing additional components or models which are tailored to all-volunteer organizations, congregational social services outreach programs, national service programs and small grassroots organizations,.

This strategy will also require elements that prepare more individuals to teach the core curriculum and/or add it to existing classes or training.

The outcome of this collective work should be disseminated broadly rather than being owned by one organization. It should be available for use in training through multiple entities for maximum accessibility and minimal cost to organizations and individuals. Obvious delivery mechanisms include volunteer centers, state and national conferences, higher education, continuing education, individual consultants, national organizations, and the internet.

Desired outcomes include:

- consensus around what effective volunteer resources management is;

- common agreement on basic skill development, so that all training is based on common elements;

- increased cost effectiveness by not reinventing the wheel; and

- improved credibility in the eyes of those we wish to influence (agency executives, professional leaders, business leaders, funders).

Who:

- Academia (community colleges, universities, Centers for Nonprofit Management, American Humanics)
- Professional associations in volunteer management at the national and state levels
- Practitioners in volunteer resources management
- Volunteer center training staff
- National service program staff
- Consultants and trainers
- Nonprofit Academic Centers Council
- Training staff of national nonprofit organizations
- Congregational leaders involved in social service outreach programs

Potential First Steps:

- Identify existing sources of work, materials, knowledge
- Identify appropriate individuals to bring to the table
- Convene work group

> "The professionalism of volunteer program management will only become the rule, rather than the exception, when funders look for it as a quality in the organizations they choose to fund. This Study is a great start."
>
> *Local manager of volunteers, website comment*

NATIONAL
SERVICE
PARTICIPANTS

What:

Recruit, prepare and place additional national service participants to serve in entry level management positions in nonprofits, congregations and government agencies of all sizes and types. Their role will be to assist the typical, under-resourced volunteer manager by establishing systems within those organizations to enhance and sustain that involvement.

National service participants may be especially effective as staff in supporting a specific area of programming, such as literacy or environmental projects.

This approach can be taken in selected communities by assigning a team of AmeriCorps members to the local Volunteer Center. The team is then deployed to strengthen the volunteer involvement systems within specific local organizations as well as to affect changes in the community's overall attitude toward volunteers.

Given the short term nature of national service participants, the following elements must be included for this strategy to be successful:

- Appropriate recruitment of individuals to serve in this role (loaned executives, early retirees, AmeriCorps VISTAS, American Humanics graduates, and experienced baby boomers may be especially well suited);

- Additional, intensive pre-service training in: volunteer resources management, consulting skills, and change management;

- Required ongoing coaching for national service participants by experienced volunteer management professionals, including a small stipend for those serving as coaches;

- Required commitments toward sustainability from all host organizations such as a financial contribution, access to top management, a high-level champion assigned to work with the national service participant; and

- Special preparation for host organizations so they view this as one step in a multi-year plan for building internal capacity, rather than a short term remedy for their immediate lack of paid staff. Training for host staff on how to work effectively with national service participants is also important.

Since the current federal match requirement is often a barrier for small organizations, explore ways to include some placements via a larger umbrella entity, such as community action agencies.

It will be critical to track and evaluate the impact of these short-term placements on both the organizations and the services they provide. In addition, national service participants could be tracked to learn how they use their experience to benefit both their own careers and their communities. Ideally, this strategy will also jump-start nonprofits that have not yet experienced the "value loop."

Who:

- Corporation for National and Community Service
- State Service Commissions
- Local service practitioners
- Volunteer centers
- External evaluators
- Community foundations
- Local nonprofits of various sizes

Potential First Steps:

- Identify existing examples of similar national service assignments
- Explore feasibility of this concept with program directors
- Discuss the feasibility of amending AmeriCorps regulations to facilitate participation by small organizations and communities

Theme:

BUILDING KNOWLEDGE

Related Issues

- The need to more accurately measure/capture/describe the results of volunteer involvement in ways that are meaningful to various stakeholders like board member volunteers, agency executives, funders, elected officials.

- The need to continuously update knowledge about volunteering to maximize its impact and gain support for organizational capacity.

- The need to demonstrate the benefits of adopting best practices, based on credible evidence and proven results--the "value loop".

- Without proof of impact and results, boards, executives, funders, and elected officials see little justification for allocating financial resources to support volunteer involvement.

7 **Strategy**

Transformational

FOCUS ON EVALUATION AND IMPACT MEASUREMENT

What:

Convene a small group of individuals with expertise in evaluation to develop and implement a plan for identifying and communicating performance measures. The plan should include:

- Identification of meaningful metrics (benchmarks, formulas, measurements) to demonstrate value to the community, to the organization and to volunteers;

- Development and dissemination of practical, field tested evaluation tools that are both qualitative and quantitative;

- Communication of evaluation results both within organizations and to external stakeholders; and

- Understanding barriers within organizations that do not embrace evaluation currently, and identification of incentives to overcome these barriers.

Although there is general agreement that this aspect of volunteer resources management is important, there has been no intensive effort to develop standardized performance measures that the field can use. Significant progress can be made by building upon previous work in nonprofit management evaluation and exploring how volunteer involvement relates to that. However, it is imperative that this strategy NOT be just a theoretical exercise. It must be reality based, generating concepts and tools which will work in the field and allow local adaptation.

Who:

A national policy or research institute, in partnership with:
- Practitioners (volunteer resources managers representing a variety of settings)
- Evaluation experts
- Communication experts
- Foundation representatives who have an interest in this subject
- Supplier organizations like congregations, schools, or employers
- Government users of volunteers
- Academia, including some of the top Business and Public Affairs schools with Nonprofit and Social Sector Management programs
- State associations of nonprofits
- Best practice in programs/organizations
- Those who have done previous work in this area such as Independent Sector or United Way

Potential First Steps:

- Research existing work related to this
- Develop agenda with defined work product outcomes
- Convene meeting of appropriate "experts"

8 Strategy — Transformational

NATIONAL RESEARCH AGENDA

What:

Develop a national research agenda, driven by the needs of those in the field. This will focus resources on areas which have current relevance to strengthening volunteer involvement, management and impact, but haven't been extensively explored. A few appropriate individuals with expertise in both the academic and practitioner worlds can identify broad topic areas that need more attention. This agenda can then guide the funding decisions and research subjects for those wishing to contribute directly to the body of knowledge about volunteer involvement.

This strategy should include a plan for disseminating research results to all stakeholders, including application at the practitioner level, to ensure that it results in improved practices and capacity. Also, a process should be established for periodically re-surveying the field to update the agenda.

Additional related ideas to explore include:

- Promotion of the involvement of practitioners in research

- A challenge to universities to sponsor research as part of their own institutional civic responsibility

Specific topics for research suggested in response to this study include:

- Models of effective partnerships between congregations and nonprofits;

- The unique benefits of investing in volunteers who are more challenging, such as adolescents, persons with disabilities, or persons with limited English proficiency;

- Barriers to organizational adoption of best practices in volunteer management;

- Comparison of the return on investment of various recruitment techniques, the internet, intermediaries, mass media, and personal contact being examples;

- Comparison of the return on investment of various retention techniques;

- Baseline studies of types of volunteering that have not been previously studied, including comparisons of types of volunteers in different settings, variations in service by different ethnic groups, or other new elements worthy of research;

- Studies of volunteer resources management roles compared with other similar management roles;

- Validation of best practices.

Who:

- ARNOVA members
- Academic centers for nonprofit management
- Government research entities like the Census Bureau or U.S. Department of Labor
- Practitioners in volunteer resources management (AVA members)
- Nonprofit executive directors
- Supplier organizations
- Foundation representatives

Potential First Steps:

- Convene small group of individuals to identify broad gaps in research
- Obtain funding to create an online database of research in progress as Canada and UK do
- Develop a plan for dissemination and application of research results

Conclusion

The eight strategies outlined in this report

- are within our reach

- can be acted upon relatively quickly and with long term results

- do not come with huge price tags, especially if resources from many sources are pooled together at both the national and local levels

- acknowledge previous efforts, contributions and expertise of many different types of local, state and national organizations, while challenging us all to commit to an unprecedented level of collective action

This is a feasible plan with the potential to significantly increase volunteer management capacity in America's charities and congregations in the near future. Such an organized approach bodes well for those who will receive benefits from services delivered through increasingly efficient nonprofit organizations and faith-based communities.

For information on *From Research to Action: A Unified National Response to the 2004 Volunteer Management Capacity Study*, go to www.volunteerinput.org.

> "If we continue to permit an organization that uses volunteers to receive funding without talking about developing infrastructure to support those volunteers appropriately, they will never do it on their own."
>
> *Wilson Goode,*
> *Senior Advisor,*
> *Public/Private*
> *Ventures*

About the project

The volunteer management capacity survey project was launched by the USA Freedom Corps with support provided by the Corporation for National and Community Service and The UPS Foundation. The research was conducted by the Urban Institute. Principal researchers were Mark Hager, Ph.D., Urban Institute; and Jeffrey Brudney, Ph.D., University of Georgia.

Methodology

The volunteer management capacity study is based on surveys of separate populations of U.S. charities and congregations. A sample of 2,993 charities was drawn within expenditure and sub-sector strata from 214,995 charities that filed Form 990 with the IRS in 2000. A sample of 1003 congregations was drawn within denominational strata, including an over-sample of non-Judeo-Christian congregations, from 382,231 entities provided by American Church Lists in August 2003.

From August to November 2003, the Urban Institute and Princeton Survey Research Associates called organizations to verify their existence, check mailing addresses, and obtain the name of an appropriate contact; they then completed pre- calls with 80 percent of charities and 72 percent of congregations. After contact, they mailed a letter that explained the motivations of the study and invited participation, and then called them up to 30 times to collect study information. Interviews were conducted with organizational representatives familiar with volunteer management; interviews averaged 20 minutes. In the final weeks of the study, interviewers offered $50 donations to organizations that were reluctant to participate; 11 percent of interviews were completed with an incentive. Adjusting for sampled organizations that were defunct or could not be verified as working organizations, the response rate was 69% for both the charity and congregation samples.

Responding charities were weighted to represent the expenditure and sub-sector strata from which they were sampled. Responding congregations were weighted to represent their denominational categories. Weights were further adjusted to account for charities and congregations unreachable in the pre-call. Because these weights help ensure that our samples reflect the characteristics of the working populations from which they were drawn, the results of the study reported in this brief are based on the weighted responses.

For More Details

Complete reports of this research can be found online at www.Urban.org in the Research section. Search for titles under the "Nonprofit Sector" topic.