

**THE URBAN INSTITUTE**

**FORUM ON  
VOLUNTEER MANAGEMENT CAPACITY**

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ROBERT REISCHAUER (president, the Urban Institute): Good morning. My name is Bob Reischauer. I'm the president of the Urban Institute and I want to welcome you all here this morning to this forum at which the Urban Institute is releasing the findings from the national study of volunteer management capacity among charities and congregations that we have conducted for the Corporation for National and Community Services with involvement of the UPS Foundation and the USA Freedom Corps.

The study is a product of the Institute's Center on Nonprofits and Philanthropy, which is ably led by Elizabeth Boris, who will chair the panel later this morning. This is a division of the Urban Institute, which over the last few years has been doing much of the innovative and path breaking work that has been done in this country helping us understand the scope and dimensions of the nonprofit sector, its importance to our society and our economy. And we are wonderfully gratified for the contribution that Elizabeth and her colleagues have been making.

We are, and have been since our founding, really a nation of volunteers. From the first settlers arriving in this country to the barn raisings and the development of the West, we have relied, to an extent that few countries in the world have, on volunteers to provide social services and to strengthen communities. Nevertheless, we understand in a systematic and rigorous way very little about volunteers -- the extent to which we really rely on them, the kinds of skills and capacities that they bring to their services, the needs of organizations for more volunteers, the way they are utilized, the effectiveness with which charities and congregations manage and utilize this source of services. Some of that gap will be filled by the work that we are doing and we look forward to the future in that sense.

I am now going to introduce Ron Christie who, like me, did time in the budget world, but has gotten real employment as a special assistant to the president and acting director of the USA Freedom Corps. Ron served as deputy assistant to Vice President Cheney on domestic policy focusing on budget issues, health care and other policy issues.

I'm sort of wondering, what else does he do? I mean, what's left for the rest of the staff to do? He worked briefly for Senator George Allen, but of course, I knew of him when he was working closely on the House Budget Committee with Chairman John Kasich, who is a good friend of mine. Ron is also a member of the Council on Foreign Relations and a frequent guest on TV shows, many of which I don't watch. (Laughter.) No, they're directed at younger people -- put it that way. (Laughter.) I mean, I'm into the old-people channels. But there was a list in his file of all these Gen-X places, so I'm going to go find them on my dial. By training, he's a lawyer -- and a great addition to the public service in America. Ron?

(Applause.)

RON CHRISTIE (acting director, USA Freedom Corps): Thank you very much.

Good morning, everybody.

AUDIENCE: Good morning.

MR. CHRISTIE: Oh, come on. (Laughter). You know, for as exciting of a day that we're going to have today -- let me try that again.

Good morning!

AUDIENCE: Good morning!

MR. CHRISTIE: Thank you, that's much, much better.

We had the opportunity to meet up on the Hill, and we were just joking -- you know, I finally have found real employment. You get away from the green eyeshades and the geek spreadsheets of working for the Budget Committee and you finally have the opportunity to do real work, as opposed to pushing numbers and papers that people don't care about. This is an exciting day.

I look around the room and we see representatives from the Peace Corps; we see representatives from the Points of Lights Foundation; we see the interns from the USA Freedom Corps in the back. (Laughter.) We see a little -- a cross-section, really, of people who have provided a lot of time and a lot of effort to ensure that our volunteer communities are well represented; but most importantly, that Americans all across the United States, who are looking for meaningful service opportunities, have the opportunity to meaningfully participate in our communities.

And as the acting director of the USA Freedom Corps, I just wanted to spend a few moments with you, really, to give you a sense of who we are and why we're here, and why this is such an important and exciting day as we look at the survey and the capacity study that we'll be discussing a little bit in a few more minutes.

USA Freedom Corps was really created after the State of the Union in 2002, because, as we all know, September 11th took us all by surprise. And the country has really not only changed after that terrible day, but it's changed for the better because we all looked into our hearts and we all looked into our consciences and we decided what makes us strong as Americans. What makes this country the greatest country in the world? We realized that it was our American spirit and our willingness to roll up our sleeves and to help our neighbors and to help our nation. And through that the president created something called the USA Freedom Corps, which is a White House office and a service council to engage Americans; those people who are looking for meaningful ways to roll up their sleeves and get involved in their communities.

And as a coordinating council, we work very closely with the Corporation for National and Community Service, which is ably headed by David Eisner, who you will hear from in a few moments. We work with the Peace Corps, represented by Henry McCoy, who is the Africa director, here this morning; and we also work with FEMA, looking at first responder communities. I see Karen Marsh in the back.

It's just really been an exciting effort to pull people together and to engage and to find those meaningful service opportunities. And from that, we also realized -- and I was just saying to Bob,

you know, you become a budget geek and you start looking for numbers. And the president is definitely the first MBA to occupy the Oval Office, and he always says: We want to measure... what is the standard? What is the benchmark? And where are we going and how do we need to work better to get to our goal?

And so we worked together very, very closely with the Bureau of Labor and Statistics to form a capacity survey and said: What is the volunteer strength of America? How many people do we have that are engaged in our respective communities who are volunteering?

And in 2002, we took a snapshot. We found that 59 million Americans were volunteering; a good number. But we told the president that and he said: "Well, that's great guys, but go out there, engage Americans, talk to Americans. Work with businesses, work with different entities. And see what we can do to make that number stronger."

And last year we were absolutely thrilled to find from 2002 going forward a year to 2003, the number of Americans who were volunteering increased by nearly 4 million people, up to 63.8 million. And that really underscores the importance of the volunteer capacity survey that we're going to hear about this morning because the thing that we found is that nearly 30 percent of all those Americans who are volunteering and participating in our communities, they're doing it in their places of worship, their congregations, and their charitable work is going through their congregations.

And so I say to you -- as we look at the exciting panel this morning and we look at the results, I say to you, let's look at ways to interpret this data; not from a budget-geek, green-eyeshade capacity, but look at it to find real ways that we can address real needs in our communities and perhaps fill some of those gaps that this study has identified to ensure that we are all working as cost-efficiently, cost-effectively -- and we're delivering the services that are most needed by our constituencies.

And so rather than to get up here and to talk forever, I really want to introduce our next speaker, our next presenter, Lisa Hamilton, who is from the UPS Foundation. And we're all familiar with UPS -- the big brown trucks and they make deliveries of our packages and services around the country. But the UPS Foundation really is making a very important delivery by working not only with government sectors, but with the nonprofits in our different communities to ensure that they're doing their part to engage Americans. They're doing their part to provide meaningful voluntary and community service activities.

And Lisa has been with UPS for seven years. Previously she served at the Tax Council, which has got to be very taxing and very difficult work -- (laughter) -- to say the least. But in her position being the program director for the UPS Foundation, I'd just like to turn the podium over to her so she can underscore the importance of this survey from the perspective of UPS.

But thank you, everyone, for all of your work to get to this very important milestone where we are today, and let's continue our efforts and let's continue to provide meaningful ways for all Americans who are looking to answer that call to service to do so. So with that, Lisa, I turn the podium over to you.

Thank you very much, everyone. (Applause.)

LISA HAMILTON (program director, the UPS Foundation): Welcome.

It's a pleasure to be with you today as we unveil this landmark survey on nonprofit volunteer management capacity. Strengthening effective volunteer practices and building capacity in nonprofit organizations are both key components of the UPS Foundation's giving approach. And we know that both of those are important to the missions of many nonprofit organizations across the country.

In 2002 President Bush's call to service asked all Americans to serve their communities and the nation. And later that year, the USA Freedom Corps invited the UPS Foundation to join the Corporation for National and Community Service to fund research on volunteer management capacity in our nation's nonprofit organizations. We were honored to be asked and pleased to be a part of this collaboration among the public and private sectors.

For the UPS Foundation, this research is important for three reasons. First, it presents an opportunity to evaluate available resources for effective volunteer management and the prevalence of various management practices. Second, it allows us to engage thought leaders all across the country in timely and important discussions about how we can collaboratively address the challenges, gaps and opportunities that this research reveals. And finally, the research findings are powerful tools to help volunteer organizations engage and manage volunteers to expand and sustain their organizations.

Many of you are aware of the UPS Foundation's work over the past six years in supporting organizations' effective management of volunteers. I'm pleased to see so many of our partners and others who represent nonprofits, academia, government programs and volunteer managers here with us to learn about this research and work toward a national response.

Thank you all so much for being here. And so it's my pleasure to introduce to you the two researchers who led design and implementation of the research and who will present to you a summary of their findings.

First is Dr. Mark Hager, who is senior research associate at the Center on Nonprofits and Philanthropy at the Urban Institute; and Dr. Jeff Brudney, who is a professor of Public Administration and Policy and director of the Center for Nonprofit Organizations at the University of Georgia.

Mark?

(Applause.)

MARK HAGER (senior research associate, the Urban Institute): Thank you, Lisa.

It's my great pleasure today to represent the study that a lot of different people have had their hands in. I'll only have a few remarks today, so it's important that everyone has the briefing

documents that I hope that most of you picked up as came in. And if not, please make sure you get away with a copy, and if possible, more than one copy to show these around. It's not all the findings of the study. It's our attempt to boil down a great amount of information into a number of bite-sized pieces so that hopefully it can be digested and used in a variety of ways. So everybody make sure that you get a copy of that.

One thing you'll notice is that there are no authors listed on that document, and that's because it is a result of a very collaborative process over the past year, and it represents intellectual contributions from a wide range of people, including: folks from USA Freedom Corps -- and I'd like to especially thank Therese Lyons for her contributions; UPS Foundation -- and a nod to Liam Clarke (sp) for all of his hard work in the past year; and the Corporation for National Community Service, especially Dr. Robert Grimm in the back of the room there, and Dr. David Reingold.

I also want to acknowledge the work from several people at the Urban Institute, who've been working with me in the past year: Dr. Elizabeth Boris, who you'll hear more from this morning; Omolara Fatiregun and Amy Brimer. Special thanks to the folks who did the hard work of actually collecting the data for the project, Princeton Survey Research Associates International, principally Dr. Mary McIntosh, who I know is in the building but I think in another meeting on the seventh floor right now.

I also want to acknowledge the contributions of Dr. Fritz Scheuren at the National Opinion Research Center, and also especially, right in front of me, Dr. Jeffrey Brudney, who has participated in almost every phase of the work. So I'm going to present some material here, but he will help field questions after I give a short briefing on what we think we've accomplished.

The study is based on separate samples of charities and congregations. By charities, we mean public charities, those organizations that get an exemption under Section 501(c)(3) of the Internal Revenue Code, those that are registered with the IRS that are large enough to be required to report annually to the IRS. So not all nonprofit organizations, but only those that are large enough to be reporting.

In 2000, there were about 215,000 of these charities, representing the full range of culture, education, health, social services, environment, sports, community development, research, all those different kinds of missions that are done by our nation's nonprofit organizations. However, we know from other work that many people volunteer in congregations, so a nice feature of the study is the inclusion of congregations. By congregation, we're referring to this sort of religion-neutral term for places of worship or places where faith is practiced, mostly churches, in this country, but also including synagogues, mosques, temples and other places of this sort.

The most comprehensive list of congregations is kept by a division of a company called InfoUSA, the division called American Church Lists. And in 2003, they listed about 380,000 of these types of organizations in the country. So we sampled 3,000 charities from the charities population and about 1,000 congregations from this American Church List group.

The study results are based on data collected from telephone conversations with about 1,750 of these charities and about 540 of the sampled congregations. However, our research scope is a bit

narrower than what we found in the 2,000-some organizations that we talked to. That is, we learned that about one in five charities do not use volunteers in their operations, so they immediately fell outside of the scope of our study because we were interested in those organizations that are using volunteers in their operations.

We also learned that about two out of every three congregations do not manage volunteers in social service outreach activities. And this was the focus of the research. We wanted to key on those congregations that used volunteers in such things as food banks and thrift shops, things we refer to as social service delivery outreach, not such things as Sunday school teachers and choir members and ushers, all valuable types of volunteerism, but not the kind of volunteer management that we wanted to key on in this particular study. So our research focus is on the roughly one in three congregations that manage volunteers in social service outreach kinds of activities.

The findings paint both encouraging, and in other cases, as you might imagine, discouraging pictures of the state of volunteer management capacity among charities and congregations in the United States. Some of the findings are in line with conventional wisdom. And there's at least one thing that I'll talk about today that I think challenges the conventional wisdom about volunteer management capacity in the country today.

My remarks are going to focus on five broad areas: first, current management capacity in these kinds of organizations; second, some challenges in volunteer management as reported by our samples; thirdly, benefits of volunteers to organizations that they serve; fourthly, the readiness of these kinds of organizations to take on new volunteers; and lastly, some avenues for building capacity, which I'll touch on briefly but I think will be taken up largely by the panel that will follow us here in a little bit.

First, current management capacity in charities and congregations. We learned that charities either cannot or do not put many staff resources toward volunteer administration. Even though 62 percent of charities say that they have a staff person who spends time managing volunteers, the amount of time spent by this person is typically quite low. The typical paid staff volunteer coordinator spends 30 percent of his or her time in volunteer administration. This is a median, meaning that half of these paid staff coordinators spend more than 30 percent of his or her time on volunteer administration, but the other half is spending less than 30 percent of time on these kinds of tasks.

We also asked about a range of volunteer management tasks practiced in these organizations. We asked about nine different kinds of best practices that have been identified in the field of volunteer administration, such things as supervision and communication with volunteers, written policies and job descriptions for volunteers, documentation and measurements of volunteer impacts, training for volunteers or training for staff on how to work with volunteers, and some other kinds of items like that.

We asked respondents if they had adopted these kinds of management practices to a large degree, to some degree, or not at all. And these kinds of distinctions proved to be useful in how we thought about the adoption of these types of management practices.

As expected, some practices were more widespread than others. However, we learned that these kinds of management practices have not been adopted to a large degree by most charities that use volunteers or congregations that are managing volunteers in social service outreach activities. However on the other hand, when we start thinking about those organizations that have adopted to some degree, we found that most practices have been adopted by a majority of charities and congregations at least to some degree.

So taken together, these two findings suggest that organizations are receptive to these kinds of best practices as advertised by the field, but that they experience barriers to wholesale adoption of many of these management practices. One clue to such barriers is our finding that investments in volunteer management staff and investment in volunteer management practice go hand in hand. That is, the more time that this paid staff person -- remember the median at 30 percent -- the more time that this person spends in volunteer administration, the more likely that these organizations have adopted these kinds of best practices.

A second area, challenges in volunteer management. We asked respondents about the degree to which their organization faces challenges in such things as recruiting volunteers, in getting enough financial support for their volunteer programs. We asked them about whether they experienced poor work habits on the parts of their volunteers, and a number of other sorts of issues.

Overall, the news was pretty good. And I guess that's the banner finding. We learned that a minority of organizations report big challenges in these kinds of areas. However, this generalization masks several issues that emerge from the study as notable challenges for charities and congregations. Such challenges as recruiting and allocating sufficient resources to support volunteer management are reported by enough organizations to take note of these issues.

For example, one in four charities and one in three congregational social service outreach programs report big problems with recruiting volunteers available during the workday. So while the news is good, there are clearly some issues that justify attention.

The research indicates the challenges of these kinds are greater in smaller organizations. Larger charities and larger congregations tend to have a more developed capacity to manage volunteers and fewer associated challenges in recruiting and managing them.

We also observed greater challenges among those organizations that commit small amounts of staff time to volunteer management. The more time this paid staffer, again recalling that the median is about at 30 percent, but as that number goes up, we see that these charities that have the volunteers accordingly are spending more time. They also report fewer challenges in the management of volunteers.

The third area that we talk about in the briefing report is benefits that charities and congregations report from their volunteers. We learned that charities value their volunteers financially. We asked them how much of a donation they would require to replace an hour of volunteer time from one of their typical volunteers. The responses ranged from \$2 an hour to \$5,000 an hour. (Laughter.) But the median response in looking at the total distribution was \$20 an hour, meaning that half the sample said \$20 or less and the other half said more than \$20 for an

hour of volunteer's time. This number is slightly higher than estimates of volunteer time offered by various others, but the underlying point is that charities value the time that volunteers spend in their organizations. Real work gets done. Nonprofits value these efforts.

Now, we know a little bit more about the value of these efforts because we learned from the survey that the value extends beyond cost savings, and the charities are enthusiastic about other kinds of benefits that volunteers bring to their organizations. We specifically asked charities, have volunteers increased the quality, level or detail of services that they provide, or if volunteers increased public support for their organization. Most charities said yes and to a great extent.

So the resulting picture is that volunteers provide both financial and other kinds of benefits to the charities that they serve, and the charities are enthusiastic about this.

Well, I asked myself, and maybe you're asking the same thing, benefits are great, but what does this have to do with volunteer management? We learned that benefits from volunteers and investments in volunteer management feed on each other; that is, charities that benefit from volunteers are more likely to invest in volunteer management, and charities that are investing in volunteer management are the ones that are more likely to say that they get benefits from volunteers. More investment in staff and volunteer management practices, more benefits; more benefits, more investment; and around and around and around. But the trick, as one person from the Corporation for National Community Service noted to me, is getting organizations into this positive feedback loop so that they can get to the benefits and the investments that result in both good services and good management of volunteers.

A fourth area: readiness to take on new volunteers. And this issue really goes to the heart of the purpose of this research, and probably also provides the most controversial kinds of findings. Previous research and commentary has highlighted the lack of capacity among organizations to manage volunteers, calling into question various efforts to encourage people to volunteer if charities and congregations are not ready to take them on.

We asked respondents how many volunteers they could take on, given their current capacity to manage volunteers and to use volunteers, and the results really surprised us. Only one in 11 charities and one in 25 congregations said zero, none, we can't take on any more. A large majority said that they were ready and able to take on at least some additional volunteers right now with their current capacity. So how many volunteers could they take on? We asked them, and answers ranged from zero, none, don't give us any more to unlimited, give us as many as you could possibly give to us. But the median here was 20 volunteers; that is, half the respondents said that they could take on 20 or more volunteers and the other half said they could take on somewhere up to 20 volunteers. But we take this 20 as sort of a typical response.

So if the typical charity and the typical congregation or social service outreach activity could take on 20 volunteers, the numbers really start to add up. We estimate nationwide readiness to take on nearly 6 million new volunteers, and I hope we get the chance to talk about -- more about that in the Q&A. This is good news for advocates. However, this probably does not mean that we can ignore the question of volunteer management in our charities and congregations, so lastly I'm

going to talk very briefly about some avenues for building capacity, which come from specific questions that we put to the charities and congregations in our sample.

We asked respondents to react to a number of possible options geared toward improving their volunteer management capacity. One popular option, said to be potentially helpful to a great extent by 45 percent of respondents, is a full-time, stipended volunteer who would be responsible for volunteer management. This immediately calls to mind the potential for using AmeriCorps members or other types of stipended volunteers and leveraging greater volunteer recruitment and use.

A second popular item is simply information about potential volunteers. Two in five organizations say that such information would be helpful to them to a great extent. We know from other work that people want to volunteer, and charities and congregations say they need these volunteers, but somehow these two -- the need and the supply -- are not connecting. This points to the value of volunteer centers and other information resources geared toward matching volunteers with organizations that need them.

A third item, that was a little bit more popular with congregations than with charities, is training staff in how to work more effectively with volunteers. Charities that said they have challenges recruiting individuals to work during the work day, charities that said that they are challenged by the lack of paid staff time to train and supervise, charities that say they lack adequate funds to support their volunteers, and charities that say they have problems with work habits of volunteers all say that they could benefit from training or professional development for staff on how to work better with volunteers. This suggests that efforts to provide avenues for such training could pay dividends in improving volunteer management and decreasing many of the stated challenges that these organizations report.

We discuss a number of other issues in the briefing document that I encourage you all to take home with you, and I expect these capacity-building options will be a big part of the discussion with our panel.

So, Dr. Brudney and I would be pleased to take any questions that you have for about 15 minutes or so. I'd like for the questions to focus more on research kinds of topics at this point. If it goes to such issues as next steps or some of these policy implications, those may be left to our panel that will take up after we finish the discussion right here. So, I'm happy to take your questions.

Yes, sir?

Q: Did you look for or find any geographic distinctions? Did you look for or find any geographic distinctions?

MR. HAGER: We did not look for geographic distinctions. Tell me what you would expect.

Q: Well, just to see a difference between urban and rural because I think in certain parts of the country, needs are greater than in some other parts for volunteers. Some -- you know, there are more Bible Belt locations and congregational responses may be stronger than in some others, et cetera.

MR. HAGER: Yeah, yeah. This is a great question. I'm trying to think what we have on the data file. We have PSRA calling up all of these respondents and asking them a number of questions. We know where the organizations are. We could determine if they're in -- what's sort of the population density of the area that they're in and look for these kinds of things. Hasn't been done, but I think that's a great suggestion.

Other questions? Yes?

Q: Did you look at any recruitment practices across programs and any similarities, differences, and so on, of recruiting volunteers?

MR. HAGER: Our recruiting issues -- when I think about the recruiting issues we asked about, it was mostly in a context of these challenges that we asked organizations about. And we asked about three different kinds of recruiting issues; whether organizations are challenged in recruiting enough volunteers, whether they have problems recruiting volunteers during the workday, and whether they have problems recruiting volunteers with the right kinds of skills. And when we stack these kinds of challenges up against other kinds of non-recruiting issues, things like training and work habits of volunteers and even money, we find that the recruiting issues -- the challenges of recruiting -- are among the higher kinds of challenges these organizations are reporting. And I think that's consistent with the finding that these charities are saying and congregations are saying we need more volunteers and we're having a hard time finding the right ones or enough of them to meet our needs.

Yes, ma'am?

Q: (Off mike) -- classified as charities, I assume. (Off mike) -- congregations, depending on the degree to which -- (off mike) -- relied upon their faith expression or --

MR. HAGER: There are -- and we start with these two populations, so the congregations are all I guess what we call the faith organizations. And then the charities, we asked whether or not they have any type of affiliation with -- a partnership with any kind of a faith entity, and we learned that many of them do. I think 29 percent of the charities report that they have some type of collaboration with some type of a religious organization; not necessarily indicating that they are faith-based themselves, but that they have some type of collaboration. I mean, I suspect many of them do have some type of faith underlying the mission of these particular charities.

But this 29 percent say that they have some type of relationship, and we found that these organizations displayed some different characteristics from the charities that say they do not have any kind of tie, partnership or collaboration with a religious organization. They got more benefits from their volunteers and they had more management kinds of capacities; more management -- greater adoption of these different management strategies that I was talking about. But we also

found that they were no less challenged than organizations that did not have ties to different types of religious organizations.

Good question, thanks.

Yeah, Rachel?

Q: One challenge that you mentioned was the charities reporting that they needed to find more volunteers during the workday. I'm wondering if you asked any questions about types of groups that charities were actually trying to recruit from like stay-at-home moms or teens or professionals, and also sort of what groups they wanted to pull from if they had more resources or more support from intermediaries?

MR. HAGER: No, we didn't ask that specific kind of question. We did ask about the nature of the volunteers that these organizations tend to work with, whether they tend to be older volunteers or younger volunteers, and those charities that rely more on volunteers that are over 55 years of age are less likely to face this kind of a challenge. But the ones that are working more with -- even with kids or with a mixed population base of volunteers are the ones that are more likely to face this, and that's an intuitive kind of a finding. There are not very many charities that rely principally on older volunteers; you know, a certain number of them, but not a large number of them. And so I think it remains as sort of an important issue for the sector to wrestle with about how to deal with this workday competition kind of an issue.

Yes? Yes, sir?

Q: Did you ask about recruitment methodology? I mean, online? How organizations did recruit?

MR. HAGER: We did, yeah. And it's not in your briefing document so it's not on the tip of my tongue because that's where I have been storing my facts right now. We did ask about a range of recruitment strategies taken on by these organizations, and I'm trying to think what our core finding was. We found that organizations that face more challenges in recruiting are the ones that are doing more of the different kinds of recruiting strategies.

So when they -- they either need to recruit more or they're facing more challenges in recruiting volunteers. They're the ones that are more likely to be doing a different array of things, like posting bills or talking to people or word of mouth or Internet kinds of recruitment. So there are other findings there and great potential in the data because we asked a series of good questions about recruitment strategies. But right now, that's the one I'm kind of thinking about.

Let's go right here. Yes, sir?

Q: My question goes a little bit to capacity or what happens, content of the volunteer experience. And I don't know if you can talk about that, but with the number of states that mandate that young men and women do community service to graduate high school, or the fact that most young men and women probably have to do some level of voluntary experience to get into good

schools, so to speak, is there any sense that volunteer management is more than pointing kids in directions as much as developing content, so that when young men and women get there there's an actual dialogue about what they're doing and why they're needed?

MR. HAGER: That's a great question. I don't think there's anything in the particular direction of our survey that helps shed light on that.

Jeff, do you have any comments you want to make about it?

JEFF BRUDNEY (University of Georgia): No, I don't think so, Mark. I don't think we explored that issue.

MR. HAGER: Okay.

Good question, though.

Let's go all the way over here. Yes, sir?

Q: Do you know what types of charities have the largest capacity to manage volunteers and which types don't? So for example, arts versus education versus health or shelters versus food banks? Did you do any of that type of categorization?

MR. HAGER: That's a great question. We did break our charities into a number of major subsectors, so looking at arts separate from health separate from social services separate from educational. What we don't have is a finer breakdown. It would be great to look at the differences between food banks and other kinds of what are probably falling in the social services arena.

I'm trying to pull one of the finding that's in the briefing document out of my head. I think we found that the organizations in the health area tended to have more developed management capacity than the non-health kinds of organizations. But I think that's the one thing that sort of popped out of the subsector analysis.

The things that we looked at a little more were like the size of the organizations and the kinds of things that they have volunteers doing. And I think I mentioned in my remarks that the larger organizations certainly seemed to have the more developed capacity to work with volunteers. It's the smaller ones that are more challenged in this regard.

Yes? Yes, ma'am?

Q: (Off mike) -- forecasting what the volunteer capacity might be. Did you get any information about a forecast? In other words, our need is greater today than it was five years ago and we project that it will be even greater five years from now. That's my first question.

And my other question is, did you ask any questions about whether the need was for more episodic volunteers or volunteers who they need on a regular basis to maybe replace what would have been full-time staff?

MR. HAGER: That's a great question. The answer to your first question is no. That would be an interesting question to have asked in our survey, but as you can imagine we had a lot of things we wanted to put to these folks, and probably even tried their patience with the version of the survey that we had.

As to the question of the nature of the volunteer, we know a little bit about how each organization uses volunteers, and so we could separate those out and see what relationship it has to the kind of responses that they put to folks. But we didn't go specifically to the issue of what kinds of volunteers could you particularly use, whether they were episodic or the more longer-term volunteers.

But we do have a sense from asking about numbers of volunteers, numbers of hours that are given by volunteers about how volunteers are used in these particular organizations. We could go deeper here; haven't yet.

Yes, sir?

Q: A large number of government agencies also use volunteers. Did you consider any of those in your study, and why not?

MR. HAGER: We haven't. We only looked at the two populations that I described.

Jeff, do you want to say a few words separately from those?

MR. BRUDNEY: Yeah. About 25 to 30 percent of all voluntarism is through governmental agencies. In this survey, we only explored the use of volunteers by charities and religious congregations. But other research in which we've been involved shows that about 20 to 30 percent of all voluntarism is organized around governmental agencies.

MR. HAGER: And Jeff's done almost all of the existing research in this area, so I'd encourage you to talk to him afterwards.

Yes? Let's go right here.

Q: Yes. With the data you collected, it seems like you could have calculated concentration ratios. I'm thinking the independent sector has a number that says 17 percent of congregation members account for 60-some-odd percent of hours volunteered. Did you calculate a concentration ratio or could you, and what would you expect to find, given what you've done?

MR. HAGER: Did not. I think that's a great question. What we did is broke organizations into four categories, which I was alluding to earlier; organizations that don't use many volunteers or have them doing many hours during the day versus, on the other end of that, those organizations that have lots of volunteers that they're working with, that aggregate up to lots of hours during the course of a typical week. And then two categories in between, those that use lots of volunteers that don't contribute too many hours, and then those that have lots of hours contributed by a relatively few number of volunteers. So it doesn't go specifically to this concentration measure, but we were

able to kind of look at the distribution of the charities and congregations within these four different groups.

Q: The reason I asked that is that my experience with these volunteer groups is one of the biggest problems they have is burnout. They rely on a core group and increasingly, and then -- it's qualitative -- (Off mike) -- have some sense as to the characteristics of a more concentrated versus a more dispersed group -- (off mike).

MR. HAGER: Yeah, I think for this question, as you're putting it, rather than the concentration idea, which has its own merits -- actually what we've done here, because that fourth group I mentioned are those organizations that rely on few volunteers to do lots of hours, and we do see that those types of organizations have, at least to a certain extent, different kinds of challenges, different kinds of management structures that are in place. And I'm not prepared to talk about those in detail, but we have that group and we see that they have some interesting kinds of challenges.

Yeah, great. Let's go all the way back here.

Q: I'm wondering if, in looking at these nonprofits, if you determined the extent to which they seek external management support, like from their state associations or from their local management support organizations. Are they looking for help externally to learn about how to manage their volunteer corps?

MR. HAGER: That's a great question. And we did not. But one reason why I think it's a great question is that we have -- I think it's one point buried in your briefing document here -- a comparison between kind of the reliance on staff within charities for volunteer management versus what we know from other research about reliance on staff for fundraising. And we know from that other work on fundraising that a lot of fundraising gets done by relationships with external entities, with federated fundraisers or "friends of" organizations involved in doing much of the fundraising for these organizations.

We make the comparison in the document, but we don't know from the study this similar kind of question about how much volunteer recruiting -- (audio break).

Q: (In progress following audio break) -- in the conversation later we might want to talk about this, but I was just curious in the research if it had looked at that trend in partnership at all.

MR. HAGER: No. The only question we ask about organizational relationships was whether or not -- which I referred to earlier -- whether or not they have a tie to, a collaboration or partnership, with a religious organization. And our thinking there was if you have such a tie to a religious organization, it may help you have access to certain kinds of volunteer bases. That didn't completely pan out, but we have that sort of thing we can explore a little bit more.

It looks like we have gotten to the end of our time allotted for the Q&A. I actually don't know what's next on our agenda. (Laughter.)

DAVID EISNER (CEO, Corporation for National and Community Service): Thank you very much, Mark. (Applause.)

This really is a very exciting survey for us. I'm David Eisner, the CEO of the Corporation for National and Community Service, which, in partnership with UPS, paid for this survey, sponsored it. And I want to thank Lisa and UPS for partnering with us on this.

We're looking forward to doing this again so that we can turn the findings from this survey into a benchmark and begin to track our progress and the progress of the field.

I wanted to share from the Corporation's point of view some of what we think are impacts and how we're going to consider some of the findings. You know, you can't really rely on any single survey to provide definitive answers to deep underlying questions, but I think that this survey certainly points in some very important directions for us.

You know, one of the core questions that we have been asking ever since the Current Population Survey by the Bureau of Labor Statistics came out -- that survey showed, as Ron Christie from Freedom Corps told us, that volunteering in the country rose from 59 million to 63 million. Remembering even that the 59 million was a year following the September 11th events of 2001, that we're still years later seeing a fairly significant increase in total volunteering.

Well with our AmeriCorps program, we're looking at this year 75,000 AmeriCorps volunteers; with Senior Corps we're looking at 550,000 volunteers within these national service programs. And we have this question, what's the relationship between these participants in national service and the broader community of these 63 million Americans who are serving year in, year out and increasing their strength? And I think that this survey begins to show us some of those connections.

First of all, and most important, this survey, in a way that I haven't seen before, identifies the value of what can be called episodic volunteers or part-time volunteers or non-stipended volunteers. And we see that 90 percent of the charities and congregations say that they see significant value in terms of reduced costs, higher quality of services and increased public support. That shows us that we need to make sure that the federal national service programs are tapping into and extending that value for the overall sector.

The other question that we have been asking since -- and I think that the entire sector has been paused on -- since the president issued his tremendous call for every citizen to serve 4,000 hours over their lifetime is, what do we do if everyone says, "Okay"? Where will they go? And I think that this survey begins to show us that there's really a balance. Yes, the management and the capacity issues are significant, and the charities that manage volunteers understand that, and yet it also tells us that we have not hit the wall, that we are about 6 million volunteers shy of what nonprofits are telling us is their capacity.

This answer came from the congregations and the nonprofits, who said, "We currently, with our current system, have the capacity to bring on this many more volunteers." I think we have to caveat that a lot. You know, we all know that people's appetites can often be bigger than their

stomachs. And I wouldn't take for granted that we could pump 6 million new volunteers into the nonprofit sector without increasing capacity an iota. But I do think that it helps us understand this balance: that we do have more capacity, that the call to service does not -- will not overwhelm the nonprofit sector where it currently is, and that we have time to make sure that we do the work that we have to do to build capacity.

And for me, the biggest answer to that is that we do not need, as some people have been proposing, to think of this consecutively, first focus on capacity, then do the call for service. I think this survey begins to point out that we're right to be doing the two simultaneously.

The other very interesting answer, from my point of view, is the answer to the question, what's the strongest predictor of success in managing volunteers? And we found pretty definitively that the strongest predictor of achieving high value from volunteers and the strongest predictor of lower challenges with volunteers is having a person that manages the volunteer activities within the charity or the congregation. That predictor was more important than a lot of the other things that are currently thought of as best practices. Not to say that they aren't best practices, a lot of those things are best practices and need to be done, but it's that person inside these organizations that's dedicated, responsible and accountable for the activities of the volunteers that is the strongest predictor of success.

And that leads directly, I think, to the other very interesting finding from the national service perspective, which is that when given an array of choices about what charities and congregations would most like to have, would be most enthusiastic about in order for them to increase their capacity, in order to be able to have more volunteers, increasing their value and decreasing their costs, the number-one answer, more than money or cash, was, "We want a stipended volunteer. That's what we need in our organizations in order for us to be able to leverage the -- what we know is out there in our communities to be able to provide greater value, provide stronger quality, and increase our efficiency, and lower our costs."

At the corporation, we're taking those answers very seriously. And we're continuing to drive some of the programs that we are currently engaged in. We have for a few years now begun a trend toward asking within our AmeriCorps program that our grantees discuss with us in their applications the ways in which they're going to be using their AmeriCorps members to leverage additional volunteers. And we're going to continue finding out where those opportunities are and we're going to continue strengthening relationships with grantees that are finding good ways to leverage those volunteers.

I want to be very clear, though, that not all AmeriCorps grantees are suited for focusing on volunteer recruitment. And in fact, one of our first goals should be do no harm. And to take an organization that has a different kind of mission and that's effectively using AmeriCorps volunteers in an anti-poverty program or a tutoring program, an education program, and tack on a mission that does not further their mission, could actually be doing harm. And we're not planning on saying that all AmeriCorps grantees should be focused on this kind of recruitment.

Nevertheless, this is a very exciting trend. We are anticipating seeing more grantees, finding the right ways to incorporate volunteer recruitment into their activities. And we're looking

forward to more AmeriCorps volunteers participating and working with congregations, faith-based organizations, grass-roots organizations and other nonprofits, to help them figure out how to tap into the volunteer capacity in their area.

And I guess the -- I'd like to point to two examples. One is we've just concluded an agreement with the Points of Light Foundation, which is very exciting to us, that we're going to be, through our VISTA program, making 75 VISTAs available to 29 volunteer centers, purely for the purpose of building that kind of capacity in those communities. And I think that we're going to see exciting results that are not only about stimulating more volunteerism, but also exciting results that help build on this base of research to tell us what are the most effective ways that we can be using stipended volunteers with this specific purpose.

Another example that I learned of in a recent trip to South Carolina: I found that -- did a Habitat build and found that Habitat for Humanity employs or works with 400 AmeriCorps volunteers -- over the course of last year. Those 400 AmeriCorps volunteers trained or supervised 120,000 volunteers that helped Habitat for Humanity do their work last year. Those 400 volunteers supervised and coordinated the construction of 1,200 homes. This helps show the real power that can be captured through the use of these stipended national service people who are dedicated to this cause as it connects to this larger community, this 63 million volunteers.

So finally, I just want to repeat thanks to UPS. I want to thank Freedom Corps and Ron for the leadership to move this forward; thank the Urban Institute for a terrific implementation of this. And I think I've only just begun to scratch the surface on the implications of the study.

We have a really terrific panel that's going to spend some time walking through what some of the outcomes from this should be. I want to thank Reverend Mayor Wilson Goode, Mary Foley, Audrey Alvarado and Bill Galston for participating in this panel.

And I want to introduce our moderator, who I don't think needs any introduction in this -- certainly in this room -- Elizabeth Boris. Elizabeth is the founding director of the Center on Nonprofits and Philanthropy here at the Urban Institute. Previously she was the founding director of the Aspen Institute's Nonprofit Sector Research Fund. And she served as vice president for research at the Council on Foundations.

I have worked with Elizabeth in several different incarnations on many different projects and found that she is a rare commodity. She is a researcher's researcher, who can be extremely precise and devoted to exactly what the meaning of the research actually entails, at the same time that she is willing to take a leadership role in moving forward, taking the research to its logical conclusions and encouraging lots of other folks in the sector to do what's necessary in order to continue to build capacity. Thank you, Elizabeth.

ELIZABETH BORIS (founding director, Urban Institute Center on Nonprofits and Philanthropy): Thank you, David.

It's my great pleasure to present this research to you today and to help this distinguished panel to talk about the implications of the study's findings and the potential follow-up activities. We are just very, very fortunate to have a panel that comes at this from very different perspectives.

We have Wilson Goode, who is currently the senior advisor on faith-based initiatives for Public/Private Ventures, where he also directs the Amachi Program, the faith-based national mentoring model for children of incarcerated parents. He was also the first African-American to be elected mayor of Philadelphia in 1983. And in 1996 he entered the Eastern Baptist Theological Seminary and received his doctorate in ministry in May 2000. He says that I may call him Wilson, but he's the Reverend Dr. Wilson Goode, Sr. -- (laughter) -- and we're very, very pleased to have him with us.

AUDIENCE MEMBER: Honorable.

MS. BORIS: Honorable.

His perspective will be slightly different from Audrey Alvarado, who is Executive Director of the National Council of Nonprofit Associations. Dr. Alvarado joined the National Council of Nonprofit Associations in 1999. Prior to her appointment, she served as the associate dean for student and external affairs at the University of Colorado at Denver Graduate School of Public Affairs. So she has the perspective of the state associations of nonprofits. She can tell us about the nonprofit likely response. And she also has in her back pocket an academic qualification.

Our third panelist is William Galston, who is the director of the Institute for Philosophy in Public Policy at the University of Maryland. Bill is a professor and he's also the director of the university's Institute for Philosophy -- I said that already -- in Public Policy. What I meant to say is he's the executive director of the National Commission on Civic Renewal, which is co-chaired by the former senator Sam Nunn and former secretary of Education Bill Bennett, and it's funded with a grant from the Pew Charitable Trust. Now Bill has this civic perspective and also a very political perspective. He's author of many books and been very involved in politics in Washington.

Mary Foley brings us a different perspective. She's chair of the Volunteer Center National Network. And she represents 350 volunteer centers across the country. For the past 10 years, Mary has been executive director of the Voluntary Action Center, Prince William area in Manassas, Virginia, which is the volunteer resource center for the Greater Prince William County.

So we are, as you can see -- very fortunate to have these different perspectives.

The way I'm going to organize this is to ask each panelist a question and then invite follow-up responses, if any of the other panelists have a response. But the idea is to give them each a chance to say a few things about the study.

So I'll start with Wilson and ask, what, if anything, surprised you about the findings in this report?

REV. WILSON GOODE (senior advisor on faith-based initiatives, Public/Private Ventures): The primary surprise for me was the low percentage of volunteer or charitable organizations and congregations that had low investment in supervision and management of those volunteers. That surprised me because of the tremendous asset and benefits that can come from volunteers and the fact that very, very few of them were really investing in training and management and in getting that done. And I can just speak to this in the program which I have had the pleasure to run for three and a half years, the Amachi Program, which worked with local congregations in mentoring children who have a parent in jail -- the first year of the program, we had stipend workers at the local congregations. And then the next year we had AmeriCorps members, 42 of them, in 42 local congregations, primarily the same people. And we saw a decided difference with AmeriCorps member that was required to go through training, to go through some development activities. And just based upon the training and based upon what they were required to do, we saw an increase in productivity and in outcomes, in the recruitment of other volunteers and in the performance of those volunteers that were there already.

So I was surprised by the lack of investment on the part of charities and congregations in the overall training and development and infrastructure in order to make the best of the volunteers.

The second thing that surprised me, still connected, was the fact that even without the training, that they said they wanted more volunteers. Their appetite was insatiable in terms of volunteers. And that's because they know the benefits that will accrue to them because of these volunteers.

On the other hand, they never got the connection between increasing that benefits to them -- those benefits to them and some training and some development and some infrastructure. And so they will go on and ask for more without -- in my view, without the necessary training.

So I think that was a surprise that those two findings really came together.

I do think, however, that my experience is that the stipend -- no matter how small, the stipend volunteer at the local congregation is the best way to increase the capacity of the volunteer organization. There's no question about that at all. And I think that having a volunteer to supervise other volunteers does not work as well, because you take away their whole accountability.

I have one more point, and then I was done. I was told not to take up the whole half an hour. (Laughter.)

(Laughs.)

MS. BORIS: Thank you. (Laughs.)

REV. GOODE: Whenever you're first, you know, you have a chance to do that. But I will not do that.

The thing which I would have liked to have seen -- you didn't ask me that, but I'm --

MS. BORIS: (Inaudible.)

REV. GOODE: -- I would like to have seen -- but I'm a politician turned preacher -- (laughter) -- and so what you learn is that you get it while you can. (Laughter.)

(Laughs.) And I'll be very quick.

And the point really is that I would like to have seen the relationship between the issue that you're asking the volunteer to volunteer for and the volunteer, the purpose. I've found that if you can really relate the reason for the volunteer to be involved, that it works.

And the second part of that -- if you can relate that personally, rather than through letters, through television, through advertisement, that direct appeal, face to face, in person, to volunteers is a much better way to reach them than through other methods, in my view.

I'm done.

MS. BORIS: Thank you.

I want to send a question down to Mary at the other end of the table. Mary, do the challenges that were identified in the research -- and the opportunities -- do they resonate with you and your experience with volunteer management coordination?

MARY FOLEY (chair, Volunteer Center National Network): Absolutely. The findings are very real. I'm not the least bit surprised with anything that I read.

And just to further elaborate on Reverend Goode -- this is a people business. This is an industry of relationships and people. And the core value that seems to be missing in our industry today is that volunteer managers are human resource managers and afforded all those rights, responsibilities, measurable outcomes, impact, personal, professional, agency-wide.

And I think until we as a(n) industry -- because volunteerism is an industry -- until we can really grasp with this and move the industry forward, we're going to continue to have the shortcomings that are reflected in the survey.

MS. BORIS: Thank you.

Audrey, does the study raise any questions for you dealing with state associations and national-level nonprofits? What's missing? What would need to be highlighted? Are there some things that you would take out of it for your group?

AUDREY ALVARADO (executive director, National Council of Nonprofit Associations): Sure. Lots of learning.

First thing: I think it justifies David's job. Right, David? (Laughter.) There was some question about that. (Laughter.)

But when the president issued the call in 2002, we embraced it and started to say, “Oh, good, I guess.” The capacity question. And this really helped us define what we mean by capacity. So we appreciate that, and we applaud the efforts.

I think the questions that were asked after the research report indicated whenever you do research, there's always more questions that you have, which is great, because you can try to dig deeper.

The qualitative question of the impact on the volunteer -- and I think Robert mentioned that, if in the audience -- is, what difference is this making in their lives, and what will that then inspire them to do into the future?

So I think it's absolutely essential, from the nonprofit sector side -- is what can we do to accommodate the interest of these folks? How do we manage those people within our organizations?

And then the other piece is qualitative: What kind of experience are we setting up for them?

There are two charts that I would draw your attention to, that I think we in the sector need to pay attention to, -- the first one was which -- page 6 -- is 56 percent of volunteers engage in direct service. That's the program, what we call program. And then there's other stuff we have to do, which is administration management and fundraising, which we all try to get below a certain percentage, because that means that we're not doing as good as we could with the resources that have been given to us.

The surprising thing to me is that the rest, the 44 percent, they were spent on more organizational capacity-building, which is what we in the nonprofit sector need. We need volunteers to help the organization. So I think in terms of the message to nonprofits is these folks can actually help you do your program, yes, but they can also help your organization build its own capacity from planting trees, as noted there -- right, the 10 percent -- to fundraising. And I know there are some limitations, and I think policy wise let's remove that limitation on volunteers helping us fundraise. And then some other internals, the filing, that kind of stuff that we need, so essential within these organizations.

The other chart is page 24, the drivers; the bimodal relationship, the smaller organizations and the larger organizations said we can accommodate. I think the drivers and their motivations for why they want volunteers is different. For the smaller it's more, “we need, we're desperate, we don't have enough staff,” I think. I'm just assuming here, right? And for the larger is, “we have the volunteer management capacity, we have the staff devoted to manage these volunteers when they come in.”

What about these other guys? What about these other guys that are sort of in the middle? I think it's between \$100,000 and \$1 million budgets. What can we do for those organizations? And I think that that's where the intermediary organizations can come into play, to help manage and facilitate placement. Sometimes they do events. They can place and it's temporary -- I'm a

temporary volunteer; I'll come in for an event, and I'm gone -- or they can help negotiate some long-term relationships for the volunteers for those organizations. So there's tremendous opportunities, I think, for the nonprofit sector.

MS. BORIS: Thanks, Audrey.

Bill, what are the implications of the study from your perspective?

BILL GALSTON (director, Institute for Philosophy in Public Policy, University of Maryland): (Chuckles.) Too many to discuss in a single panel. Let me begin with an apology. When I was asked to join this panel, I told the organizers that I had a speaking engagement across town at 11:30. That has not gone away, so I will have to pull up stakes and leave a little earlier than expected, a little earlier than I want to. I took careful notes on what everybody said, and I paid particular attention to Reverend Goode when he said that you should "get it while you can," quote, unquote. (Laughs; laughter.) And I intend to follow his -- I intend to follow his advice. So let me make -- you know, let me make four points about policy, and then I'll finish with a point about capacity. And I'll try to do this all very briskly.

First, two points on the supply side that are strongly suggested by this study. I note that buried in a paragraph is the statement that "Fewer than one in five Fortune 500 companies provide employees with paid leave for participating in company-sponsored volunteer activities." And I'm sure that's true to even a greater extent for non-Fortune 500 companies. And I think that helps explain why on the demand side there's so much more demand for volunteers during the working day than there is supply. Clearly there is a role for the private sector in helping to reduce that gap, and I think this would be an excellent opportunity for the private sector to step up to the plate big time.

Secondly, you don't have to be an expert demographer to know that the huge expansion in the next 10 or 20 years is going to come at the older end of the age spectrum, not only because of basic demographic facts, but also -- for you faithful readers of The Washington Post -- because there is a continuing trend towards earlier and earlier retirement, which means you're going to have a larger and larger supply of younger, healthier, better educated, more experienced retirees. If that isn't an opportunity for this sector, I don't know what is. And there ought to be special attention to the mechanisms needed to mobilize them into these activities, which is not to say they're not there already, but I think there's going to be a huge opportunity on the supply side.

With regard to intermediaries, I think this is a critical point. The National Commission on Civic Renewal has closed up shop now, but before we issued our final report, "A Nation of Spectators" -- available for free -- we interviewed intermediary organizations, including a spectacular example -- this was a few years ago -- an outfit called Hands On Atlanta, which I think was first organized by Michelle Nunn, or at least she was the one who presented on behalf of the organization. I'm not an economist, but I can tell you, any organization that reduces information costs, reduces transaction costs, increases efficiency, and enhances subjective satisfaction of participants is going to increase both individual and social welfare. And, you know, I believe strongly that every community of any size ought to have such an intermediary organization that efficiently and effectively links potential volunteers to appropriate volunteer activities. As I recall,

the Points of Light Foundation, which is amply represented here, has some considerable efforts in that area.

With regard to demand-side capacity, as one of the fathers of AmeriCorps way back when, let me just say a hearty “amen” to the notion of AmeriCorps volunteers are forms of leverage for the voluntary sector in general. That was part of the original conception. I'm delighted to see that there is both research support and institutional support for that role for AmeriCorps, which I think will be critical in the years ahead.

Finally, just to twist Mr. Eisner's tail a little bit, you know, he talked about unused capacity in the system. That's one way of reading this report. Let me give you another way. If I were a manager and somebody told me that my factories were already functioning at 90-plus percent of capacity, I would say well maybe we haven't hit the wall yet, but we're pretty close to it. And let me illustrate that with the report.

The report notes with pride that the single year-over-year increase in the number of volunteers in the most recent reporting period was 4 million. If the sector has unused capacity of 6 million, you do the math; how many years is it going to take until the sector reaches its own optimistically estimated capacity? (Laughter.)

Thank you very much.

MS. BORIS: Thank you very much, Bill.

I'm wondering -- I just want to throw this open to the panel before we open up to questions. What sorts of steps should the nonprofit sector take -- I know Bill had some ideas for the corporate sector -- to address the challenges and opportunities that the research has identified?

Mary, maybe you wanted to start that one.

MS. FOLEY: First of all, it's a philosophy and a respect for -- if this report says that we need human beings and managers to facilitate the work of volunteers, then I think we as an industry need to step forward to make sure that we're doing it across the board, and that it is the engagement from community base, the floor level up, and then also from the top down.

And the baby-boomer issue is frightening. There's 76 million, I think, of us -- I'm one. (Laughter.) I'm on the low end, though. (Laughter.) My sister's on the high end.

MR. : I'm on the high end! (Laughs; laughter.)

MS. FOLEY: I think the foundations portion of our business needs to give greater respect for resources for volunteer managers. I think we need to look at this holistically that -- thank you for reminding me that the AmeriCorps members are leverage, as are the VISTA members are leverage, as is the faith community, the faith volunteers leverage, the business volunteers are leverage, and that unless we look at this holistically as a community and be totally inclusive, we'll sell ourselves short. And it takes some of us to step outside our box -- which I just love to do. But

myself and practitioners -- and I see some of my colleagues in the audience -- we have a huge responsibility to make sure that the grass roots is prepared and trained and mobilized.

I said nothing in this report surprised me. It doesn't. There are so many holes in the community base that it's frightening at times. And we just begin another day with our job to build that capacity and train people and remind them that this is a holistic, community-based operation, and it's the responsibility of the press, it is the responsibility of government, it is the responsibility of everybody to support the volunteer component, the volunteer industry in America.

MS. BORIS: Thank you. One more before. Policymakers are funders --

REV. GOODE: May I comment on that?

MS. BORIS: Sure.

REV. GOODE: And that is, I think that what the report says clearly to me -- and I just want to reiterate the last point -- is that we really need to focus and concentrate on capacity, management, and training in these organizations. If we don't do that, if someone does not go out and drive that point and drive it hard, it will not happen. If we continue to permit an organization to receive funding that uses volunteers without talking about developing infrastructure to use those volunteers appropriately, they will never do it on their own.

So I'm really suggesting that this report is a kind of call to arms that says that unless we can go out and really get the kind of training and development -- and it can be done. And I think that the foundation world, the corporate world ought to basically focus in on that to help develop a real curriculum in terms of how it is that we can train the trainers to do this work which needs to be done.

MS. BORIS: Go ahead.

MS. ALVARADO: Two thoughts on that. Nonprofits have little money and little time, okay? It takes time to manage volunteers, to really bring them in to allow them to do what you need to do.

I'm thinking, then -- the second point -- how would I accommodate a volunteer within our organization? We have interns which we pay, but we don't have volunteers. I think we need to change the way we do our work so that there can be some specific tasks that can be broken up within our organizations, responsibilities or our mission of whatever we're doing, and to allow more openings for volunteers for those organizations that currently don't accommodate volunteers. That would take some time.

I think we also ought not forget those organizations that are so small -- and I go back to that chart, where those organizations that are small -- that need volunteers. Is there some way for us to outsource the volunteer management -- and I think that that's the implications of this report -- so that these organizations get access to much-needed volunteer help? But they don't have the time; they're already doing two or three jobs. And so they need somebody to come in and say here, you

talk to me and here's what I need, manage it and let those folks come in and help us -- to build the capacity of particularly the small nonprofits.

And 75 percent of nonprofits that file their returns -- 75 percent have less than 500,000 (dollars) in revenue and 43 percent, based upon your studies I believe, are less than 100,000 (dollars) of the last data I saw. Those are tiny organizations that are doing as best as they can. You know, think about the little mouse that's running around the wheel. That's what they're doing. So if we can help build their own capacity but not add an additional burden -- and I don't -- you know, I don't want to use a "burden;" that's the wrong word -- but an additional responsibility or task of managing the time which they critically need.

MS. BORIS: Bill, do you want a last word before you must run? Okay.

Well, let's open it up to the floor and for some questions for our panelists.

Yes? Would you identify yourself?

Q: Hi, I'm Stephen McMahon with Greater D.C. Cares, and I have a question about the whole concept of -- I'm a huge advocate of AmeriCorps and national service. We have several members in our office working to increase capacity of nonprofits throughout the region. And yet, as I hear this, one of the concerns that I have is I agree with you, Mary, that this is all about relationships. Volunteer management and increasing the capacity of nonprofits is all about relationships. And I just wonder what some of the panelists think about what are some of the ways that we can mitigate against some of the traps that could happen if we were to assume that AmeriCorps members doing one-year placements as volunteer managers could do the same work that ongoing volunteer managers do at nonprofits? What are some of the ways that we can make sure that the relationships that get built between nonprofits and volunteers in this -- the people served by those nonprofits are supported when a volunteer manager leaves at the end of a term of service?

MS. BORIS: Does anybody want to take that on?

MS. ALVARADO: Have another one prepared to jump in. (Chuckles.) It's a simple answer, but I think if there is that overlay than you have an ongoing relationship built with those organizations if it has been a quality placement for those volunteers.

REV. GOODE: One of the critical things to do, I think, is to start a program and assume that you have a level of staffing to carry that on for a period of time. You really don't have it. And therefore, I think that it's appropriate that, when you utilize AmeriCorps members who are there for one year or two years, that you gear their work to something which will either build capacity beyond that one year or gear it to something which will not impact in a way that you will require their service beyond that one year. That's very important in my view.

I've seen so many nonprofit and faith institutions spend a year, and then at the end of the year everything drops off the end of the world as if nothing ever happened. I think that in planning for this, we need to be very, very careful that we do not assume that this will be with us forever.

It's like the mayor's office; you never assume that you're going to be there forever. (Laughter.) It all ends, and therefore you have to go on with your life. And there is life after the mayor's office, a wonderful, joyful life after the mayor's office. (Laughter.)

REV. GOODE: Sorry.

MS. BORIS: (Laughs.) That's fine.

Was there any other response to that?

MS. FOLEY: Well, Stephen, I agree with you. AmeriCorps members bring a great deal of energy and enthusiasm, and they're educated and they're looking at those measurable things that they want to do in their life personally and professionally, which is very important. However, they don't bring a whole lot of life skills, life experiences to the table.

I have found that if you team up the more inexperienced with the experienced, use that leverage for another funder to augment the AmeriCorps or any kind of short-term staff member that you may have, that you will build in a little bit more sustainability. But you're right; I mean, it's an issue that we all deal with, and it's the old adage: if you live by the grant, baby, you will die by the grant. (Laughter.)

MS. BORIS: Another question? Yeah?

Q: (Off mike.) Dr. Goode, in terms of your efforts, along with President Bush to get to, let's say, at least 100,000 volunteers mentoring kids of inmates, you've been part of a group with Pew Foundation, the corporation, others, that meets regularly, there will be \$50 million in program grants this year, what do you see the trajectory to get to that goal? What are some of the pieces -- if we could say this is a case study area for expansion of volunteer sector activity, what are some of the elements that you see with your national partners? And you're planting seeds obviously all around the country. What are some of the key ingredients, do you think, in the next three years to get to scale on that initiative, expanding what you've done in Philly?

REV. GOODE: Well, I believe that there is a – (audio break, tape change) -- across country in local congregations and in neighborhood nonprofits and in other groups who will be interested in mentoring children of prisoners. The challenge I think that we all have is, how do you reach those people? As the challenge is with all recruitment of volunteers: how do you really reach them?

And one of the things that I've found that work best is that if you can go and stand before a congregation and tell them about the plight of these children and about how they can help these children by their involvement, by a small investment of time, it works. So I think the ability to expand the efforts across the country, with any volunteer organization, any volunteer program, is the ability to have a message that resonates with people who would want to volunteer if they heard the message.

And where are they? They're in local congregations all across the country. I think there are 280 congregations in the country, probably 80 million – 280,000.

MS. BORIS: Thousand.

REV. GOODE: Yeah, thousand – 280,000. Those three zeros are important – (laughter) – 280,000. I was thinking about the money in my pocket – (laughter) – 280,000, and probably 80 million members of congregations across the country. There's a whole wealth there that can be recruited from, but you have to have a message and you have to have the ability to reach into those congregations in order to deliver that message. And that's been a challenge, I think, in the past, and I think increasingly we're finding that when you can get to the people directly, that the response rate is tremendous. When you do it by television and radio or do it by letter, it is not something that works as well.

Corporations are also interested in helping, and if we can begin to show them how there's a real cost-benefit to that by having people volunteer and by giving time off to their employees to volunteer -- it works, but it has to be this connection between this social problem -- in this case many are children of prisoners -- and overall society and what these volunteers can do in a short period of time to impact upon that problem. And I've found that when you make that connection, that volunteers will come forward in a very, very strong supply.

I'll quickly just say this to you, that we first started the Amachi Program in Philadelphia three years ago. In 60 days we talked to 42 congregations and got over 400 volunteers just from making those direct appeals in that case. And I've found that it still works. This past weekend we recruited 60 more just from two preaching engagements. So it still works. It works if you can reach the people very, very directly. And I think that by the end of 2005 that 30,000 volunteers mentoring 30,000 young people is not beyond reality.

MS. BORIS: Okay, well, I want to thank our – I'm sorry. Okay, two last questions.

Q: I guess I want to pick up a little bit on the nexus between community service and community volunteers that you just raised, Reverend Goode, and also the larger question of the cost of building capacity. And does anybody have a sense as to kind of a barometer of what that cost is sort of per nonprofit? I rise at some risk as a fellow funder to my cousin foundation up here, the UPS Foundation. I'm with the Annie Casey Foundation. But that question of what would it cost to improve the management capacity of nonprofits, on some average or mean, does anybody have a sense of that, because as funders -- and perhaps some other stakeholders out here – to get our arms around this you first make the case, as you say, that there's an important social benefit to building the volunteer sector. The other question is, okay, if that's going to take managing them in order to build them, what does that cost? It won't happen for free.

REV. GOODE: I think that the cost is not large. I'm not answering your question directly, but to give you an example of that, one of the things that we have done is establish a thing called the Amachi Training Institute where for about \$500 per person we can bring folk in, train them for two days, and send them back out to do some work. I'm leaving here today and going to Montgomery, Alabama to train about 130 people statewide. That is an inexpensive kind of operation where I spend about – tomorrow about six hours in training with them, and they will have

enough tools they'll be able to go out and do something different than what they've been doing in the past.

And so, the answer to your question is I think that there are ways that we can do this to build that capacity without, quote, "giving to every single nonprofit group a large grant," although they will want them, but we will not – and I think the way to do it, it seems to me, is to get a number of training institutes that can bring people together in larger groups and begin to fund them, who I believe can get this work done.

MS. BORIS: Okay, last question.

MS. : And there some of those entities around.

Q: I just wondered, is this report online?

MS. BORIS: Is the report online yet?

MS. HAMILTON: It will be.

MS. BORIS: It will be.

(Cross talk.)

MS. HAMILTON: It's going to be on the corporation's website, the USA Freedom Corps' website, and the UPS Foundation's website.

MS. BORIS: It will be on the sponsors' websites.

Yes, last question.

Q: I'd like to put an interesting spin on the close here. I agree with Reverend Goode. Clearly, the volunteer experience, if done properly, decreases future needs for volunteers. That's the way to look at it. But, you know, we start talking about 76 million boomers aging out, the most educated generation in the history of the world. I think the next time we get together I would be very interested in a discussion not on volunteer management but volunteers as management. That's an interesting future.

MS. BORIS: Interesting. Thank you very much for that. I would like to thank our panelists, and would you join me in thanking them? (Applause.)

And now, David?

MR. EISNER: Just to close this out, Lisa and I will just take a minute or two. First of all, thanks again to the panelists. I think they did a terrific job. Thank you. (Applause.) I just want to say – it's pretty nice to be able to go after a panel. I get to pick all the issues I want to hit really quickly. (Laughter.)

First of all, the panelists talked a little bit about the private sector focus, and Business Strengthening America is an organization that has specifically focused on the president's call to service, and is particularly focused on building capacity with this question of, since we know that the greatest challenge to volunteers is the time of their workday, how do we get more employers to get their volunteers out and volunteer? And Business Strengthening America is doing a good job of addressing that question.

I also want to hit this question of sustainability that came up. When folks are using an AmeriCorps member for a year or for two years to be building their capacity, they've got to be thinking of them as building capacity for the organization, not simply as outsourcing this need. I think one of the things I took away from this study is that we need to start thinking of volunteers as a very important, precious resource. And the same way that it might be a burden to have sophisticated accounting mechanisms to deal with your in-kind and general operating support grants that you get from foundations, those are investments that organizations are willing to make because of the value of those grants.

And we heard from Mark that we've got this spiral between, on the one hand, the management capacity investment, and on the other hand the value that organizations are getting from the volunteers. And the question that Mark posed is, what do we need to do to get people into the spiral? So while I totally understand and appreciate the idea that we can use outsourcing as a way to get them into the spiral, I don't think that we should ultimately be thinking that the capacity and management of volunteers is something that isn't integral to the organizations that are benefiting. If an organization wants to maximize the value of volunteers to be able to increase their quality, effectiveness, and their reach, they have to have the internal systems just the way they'd have to have internal accounting systems, just the way they have to be able to manage their in-kind contributions and make reports to their other stakeholders. Now, granted, a lot of very small organizations use H&R Block and other organizations to help them manage some of those things outsourced, but the ultimate responsibility for knowing and managing that capacity nevertheless is an in-house function.

And finally I want to note that one of the things that the corporation is going to do as we move forward in the light of this study is look at the incredible breadth of our training and technical assistance capacity that we make available to grantees and to others, and find the right ways to make that, first of all, more accessible to more organizations, make it easier to access, reduce our own costs in terms of providing it so that this can actually help be a stimulus in answering some of these capacity questions. And we look forward to announcing some of the ways that we're going to do that in the future.

Finally, for the last word, again, Lisa and the UPS Foundation made this possible. And thank you very much.

(Applause.)

MS. HAMILTON: I want to add my thanks to the panelists for all of their insight this morning, and to you, the participants, for all of those thought-provoking questions. We certainly hope that this conversation will continue well beyond the walls of this building. As I mentioned,

the research is available on the website of the corporation, USA Freedom Corps, and the UPS Foundation, so that you have places to direct your colleagues and stakeholders so that they can read the information themselves.

We as the funders are going to continue to convene small gatherings to continue the conversation about this research and hope that you will do the same. And we certainly want to get your feedback and recommendations after you have those conversations so that we can incorporate that into our plans moving forward. We've created a website: [www.volunteerinput.org](http://www.volunteerinput.org) -- it's on the back of your briefing materials -- that will serve as the repository of all of your feedback. So as you have conversations and you have thoughts, we hope that you'll submit information into that website so that we can incorporate everyone's input into our plans moving forward.

Our goal, as I said, is to examine these results thoughtfully and to include all of your input, both nonprofit leaders, funders, and others. The recommendations that we put together will be shared formally in the report at the National Conference on Community Volunteerism and National Service on June 6<sup>th</sup> through 8<sup>th</sup> in Kansas City, and so I certainly hope that if you aren't able to attend you'll make yourselves aware of the feedback that comes out of that.

And you may have noticed that in addition to your briefing materials there's a lot of information we've provided about volunteer management resources and hope that you'll avail yourselves of that information.

And finally, I want to commend the researchers at the Urban Institute and the University of Georgia, and our partners at the Freedom Corps and the corporation, for their ongoing dedication to the project. Many of them have talked about the birth of this project today, and we think that we are all much better and much richer and much more informed for the work that they have done.

So with that we'll close out this morning's session, and thank you all for coming.

(END)