

Volunteer Management Capacity in America's Charities and Congregations Questions and Answers

Background on the Survey Research

Q1: Why did The UPS Foundation and the Corporation for National and Community Service think it was important to fund this study on volunteer management capacity?

A1: The UPS Foundation and the Corporation for National and Community Service (CNCS) have been longtime supporters of efforts to strengthen America's volunteer sector, both through research and grants to organizations that use and manage volunteers.

Supporting effective volunteer recruitment and management has been a focus of The UPS Foundation's grantmaking for more than six years. Through its Volunteer Impact Initiative and subsequent grant programs, The UPS Foundation has invested more than US\$10 million to help nonprofits meet growing demands for assistance by more effectively managing volunteers and building organizational capacity to better deliver services.

While volunteer mobilization has always been a goal of the Corporation's programs, in recent years the Corporation has placed greater emphasis on volunteer recruitment and management in its guidelines and priorities for awarding grants. This study provides valuable information regarding how current and potential grantees can strengthen their volunteer management efforts. In addition, this study was a logical follow up to the comprehensive survey of volunteer behavior done by the Bureau of Labor Statistics in 2002. That survey offered information on the supply side of volunteering, such as volunteer demographics, details on time spent volunteering, and the most prevalent types of volunteer work with organizations. The capacity study completes the picture of volunteer service by shedding light on the demand for and use of volunteers by the nonprofit sector.

Q2: What role did each of the project partners play? Why did they come together to support this research?

A2: The USA Freedom Corps initiated the project as a result of President Bush's Call to Service in the 2002 where he asked every American to dedicate at least 4,000 hours to service over the course of their lives. Questions arose regarding charities' abilities to engage an influx of volunteers in a meaningful way. The USA Freedom Corps collaborated with the Corporation and invited The UPS Foundation to participate in this project.

The Corporation provided a US\$300,000 grant and helped develop the survey instrument. The UPS Foundation provided a matching grant of US\$300,000 and expertise based on past research in the field of volunteer management. The Urban Institute conducted the survey and analyzed the results.

Q3: Is this study an end product or is there a plan to invest in increasing volunteer management capacity?

A3: The study contains many valuable insights about improving volunteer management that would benefit any organization that utilizes volunteers, and the sponsors hope the findings are shared widely throughout America's nonprofit sector. In addition, the study will inform policy

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regarding public and private support of the work of nonprofit organizations. While no plans for additional investment currently exist, the partners are soliciting feedback on the research regarding the best ways to address research implications. The partners anticipate the next phase of this project will include recommendations for addressing the challenges identified in the research. In addition, The UPS Foundation is especially interested in encouraging collaboration among funders to support increasing volunteer management capacity.

Q4: Is this a one-time survey or will the sponsors conduct it again on an annual or bi-annual basis?

A4: We hope to conduct this survey on a bi-annual basis.

Research Implications

Q5: How will the survey sponsors/partners use the research findings and what are the next steps?

A5: At this time, the sponsors of this research have created a website at www.volunteerinput.org to share the key findings and gather input on the study and its implications for volunteer management. The sponsors are interested in reactions and recommendations concerning what resources or capacity are needed and what steps should be taken by the nonprofit sector, funders, policymakers and others to strengthen volunteer capacity in America.

While no plans for additional investment currently exist, the partners are soliciting feedback on the research regarding the best ways to address research implications. The partners anticipate the next phase of this project will include recommendations for addressing the challenges identified in the research. In addition, The UPS Foundation is especially interested in encouraging collaboration among funders to support increasing volunteer management capacity.

Q6: Is it a coincidence that the research was released at this critical time for national service development?

A6: After the creation of the USA Freedom Corps and President Bush's Call to Service in 2002, officials decided that commissioning this study was important. Because of everyone's desire to capitalize on the window of opportunity to spur civic engagement and volunteerism that opened up in the aftermath of the terrorist attacks of September 11, the study was conducted as expeditiously as possible without sacrificing thoroughness or scientific rigor. Preliminary findings were released once it became clear they were significant and of value to the nonprofit sector. The survey was commissioned to understand better the needs of the sector to recruit, train and manage volunteers more effectively.

Q7: What does the research show about the appropriate roles AmeriCorps members can play in addressing volunteer management challenges?

A7: One factor that inhibits the adoption of volunteer management practices is the availability of staff and financial resources for developing their volunteer programs. When asked what would be helpful in developing volunteer management capacity, many charities and congregational social service programs solidly believed the use of "a one-year, full-time volunteer with a living stipend who has responsibility for volunteer recruitment and management" would help address a number of capacity issues. Although the researchers did not use the term *AmeriCorps members* in the interviews, this program fits the description and suggest that AmeriCorps members (or a similar

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individual providing full-time service) could assist with a number of volunteer program. The researchers further discovered that AmeriCorps-type volunteers could be particularly useful in charities that are challenged in recruiting enough and the right kinds of volunteers, but also in those that do not have time or money to train and supervise volunteers. Since AmeriCorps members are usually a one-year resource, it is also important for the organization to utilize such so-called "intensive service" individuals in a way that helps build sustainability for the volunteer program and ensures a smooth transition after the member leaves.

Q8: The research findings state "A volunteer's time is an important resource for many charities and congregations, especially those that do not have the money to hire labor to carry out certain tasks. Volunteer time is comparable to a monetary donation." Does the research mean to imply that inadequate funding of nonprofits and congregational social service programs can be solved by increasing the number of volunteers?

A8: The main implication is that volunteers make valuable contributions to their communities. Additionally, the research indicates increased paid staff time for volunteer management is important for increasing the quality of management and reducing the number of challenges that organizations face in recruitment and management of volunteers.

Q9: What is the relationship, if any, between this research and the findings of the recent Bureau of Labor Statistics Current Population Survey about Americans who volunteer?

A9: In the last year, two major national studies were conducted to describe the current state of volunteering in America. In an effort to measure and track civic involvement and the level of volunteer participation in the United States, the Corporation and USA Freedom Corps collaborated with the Bureau of Labor Statistics (BLS) to include a yearly supplement on volunteering in their Current Population Survey (CPS). The CPS examines the "supply-side" market for volunteers: the supply of current and potential volunteers. On the other hand, the volunteer management capacity study examines the "demand-side" of the market for volunteers and measures charitable organizations' ability to recruit, manage and retain volunteers.

Q10: Can the additional Americans who are interested in volunteering be engaged and well-managed by organizations?

A10: While most study respondents indicated they are prepared to take on additional volunteers, it is unclear whether they are fully prepared to provide quality experiences and good management of these volunteers. The research indicates organizations are enthusiastic about the prospect of additional volunteers, but many charities and congregational social service outreach activities face real challenges in the actual management of volunteers.

Q11: How will The UPS Foundation communicate and disseminate these findings and implications to other grantmakers?

A11: The UPS Foundation, along with the other partners, is reaching out to other funders to disseminate the findings and encourage dialogue. The next phase of the project will include steps other grantmakers may take to strengthen volunteer management capacity of nonprofit organizations.

The briefing and key findings of the report are available at www.volunteeringinput.org and the websites of USA Freedom Corps, the Corporation, The UPS Foundation and the Urban Institute.

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In addition, the sponsors of the research have provided information about the study to the media and thousands of nonprofit and charitable organizations.

Survey Process and Methodology

Q12: What was the profile of the nonprofit organizations that were surveyed (e.g. breakdown by subsector, geography, size, scope of mission, and any other defining characteristics?)

A12: The survey respondents are representative of charities and congregations across the United States.

It should be noted, however, that most very small charities are not part of any survey universe because an organization with less than \$25,000 in annual receipts is not required to report annually to the IRS. Of the charity groups that regularly files with the IRS (the population sampled for this research), roughly one-third have annual expenditures under \$100,000 and one-third have annual expenditures over \$500,000. About one-third of charities fall under a general heading of social services; one-sixth education; one-sixth health; one-tenth arts, culture and humanities. The remaining one in four are a variety of environmental, animal-related, international, public benefit and other kinds of charities.

Most congregations are small, with nearly half reporting they have 100 people or less who regularly participate in the religious life of their congregations. One out of ten congregations told us they have more than 500 such members. Half of the congregations in the country are evangelical protestant, and roughly a quarter is mainline protestant. Eight percent are Catholic, and fourteen percent are various other religions, including non-Christian faiths. However, this research focuses on those congregations that have social service outreach activities, and these activities are concentrated in larger congregations and vary by faith.

Q13: Who within the organization responded to the survey?

A13: The researchers sought to conduct interviews with a volunteer coordinator or someone intimately familiar with the operations of the organization.

Q14: Why were faith-based organizations included as a separate focus?

A14: Congregations are included in this study because they are an important means through which Americans volunteer their time and skills to their community. The study focuses on management of volunteers in congregational social service outreach activities, because the researchers felt this dimension of congregational activity was comparable to the management of volunteers in charities. However, congregations are analyzed separately from the charities because of important differences between the two groups. One, their respondents are drawn from separate population lists. Two, charity respondents were asked to focus on all types of volunteering in their organizations (except board duties or incidental participation in special events), while congregation respondents were asked to focus only on social service outreach activities.

Q15: Why weren't government volunteer programs included in the study?

A15: While there is substantial research that shows that a considerable amount of volunteering occurs within government entities, the researchers did not survey government agencies because of the need to limit the research costs. Also, other recent research has been done on volunteering in government programs, whereas very little has been done on nonprofit organizations and congregations.

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Q16: Where can one find more information and detail regarding the research methodology?

A16: The back page of the Volunteer Management Capacity Study gives a short overview of research methodology. Additional detail follows.

The Volunteer Management Capacity Study is based on surveys of separate samples of U.S. charities and congregations conducted in the fall of 2003. The research team divided 214,995 charities that filed Form 990 with the IRS in 2000 into five categories of annual expenditures and seven sub sector categories. From that, the researchers drew a sample of 2,993 charities from these strata, including an overrepresentation of charities with larger budgets.

The researchers also divided 382,231 congregations provided by American Church Lists in August 2003 into eight denominational strata and drew a sample of 1003 congregations, including an oversample of non-Judeo-Christian congregations.

The survey instrument and method were developed by the Urban Institute in close collaboration with the Corporation for National and Community Service, the USA Freedom Corps and The UPS Foundation. The study's expert advisory committee provided valuable feedback on the survey instrument as well. To refine the instrument, the research team conducted two separate tests. First, the researchers conducted cognitive interviews with two charity volunteer managers and one manager of a congregational social service outreach activity in Washington, DC. In these interviews, the researchers asked managers to read through the wording and content of the survey questions and to reflect aloud on how they reacted to them. This process allowed the research team to flag issues that were difficult to understand or wordings that were confusing to potential respondents. Following these interviews, the researchers substantially revised the instrument.

Following approval of the research design and survey instrument by the Office of Management and Budget, the researchers conducted a second test of the instrument. The second test was conducted by Princeton Data Source (PDS), an affiliate of Princeton Survey Research Associates International (PSRAI) responsible for data collection in this study. The research team scheduled interview times with a mix of six charities and congregations, and a trained PDS interviewer conducted live mock interviews. These interviews were recorded and scrutinized by representatives from PDS, PSRAI and the Urban Institute. Following these interviews, the researchers made final adjustments to the instrument, and PDS programmed the survey into their Computer Assisted Telephone (CATI) system.

Formal data collection was conducted by PSRAI and PDS, from August to November 2003. The methodology was the same for charities and congregations, although the survey questions differed somewhat depending on whether the organization came from the charities or congregations sample. PDS called organizations to verify their existence, check mailing addresses, and obtain the name of an appropriate contact. When numbers clearly did not ring to appropriate organizations, PDS conducted research on how to reach organizations. PDS completed precalls with 80 percent of charities and 72 percent of congregations; in these calls, we verified mailing addresses and obtained the name of a contact who could speak authoritatively about management of volunteers. After successful contact, PDS mailed a letter on Urban Institute letterhead to the named representative. The letter explained the goals and rationale of the study and invited participation. Following delivery of this letter, PDS called these representatives up to 30 times to collect study information.

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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 this incentive. Adjusting for sampled organizations that were defunct or could not be verified as “working organizations,” the response rates were 69 percent for the charities sample and 69 percent for the congregations’ sample.

The researchers weighted the responses of charities so that their weighted distribution represents 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 precall. Because these weights help ensure the samples reflect the characteristics of the working populations from which they were drawn, the reported results of the study are based on the weighted responses. Since the organizations interviewed reflect the characteristics of these populations of charities and congregations, the results can be used to describe current overall conditions in the population of charities and congregations from which they were drawn.

Q17: For the purpose of this survey, how did the researchers define a volunteer (e.g., member of a nonprofit board, youth involved in service learning)? How was that definition conveyed to respondents?

A17: At the beginning of each interview, the interviewer defined a volunteer as “any person who works on a regular, short term, or occasional basis and who provides services to your organization or the people your organization serves, but is not paid as a staff member or a consultant.” Further, the interviewer told respondents not to consider their boards of directors, unless certain directors provide volunteer services to the organization beyond their traditional governance duties. The interviewers also asked them to exclude special events participants (such as walkers or bikers in a fundraiser) unless these participants also served as volunteer planners or workers at these events.

Q18: Why were certain board of directors’ activities and special event participants excluded from this study’s definition of volunteers?

A18: From the advisory panel and preliminary deliberations, the researchers determined that board management and incidental special event participants represented a different kind of management from the kinds of volunteer activities this project was interested in studying.

Q19: For the purpose of this survey, how did the researchers define a volunteer from a faith-based organization or congregation? How was that definition conveyed to respondents?

A19: For congregations, the research focused on social service outreach activities, such as food banks and thrift shops. The results focus on those congregations that say that they have responsibility for managing volunteers in these kinds of activities.

Q20: For the purpose of this survey, how did the researchers define capacity? How was that definition conveyed to respondents?

A20: The term “capacity” is a concept rather than an observable trait or an action, so one cannot ask about it directly in a survey. The researchers do not explicitly define capacity in their research report, but they generally think of organizational capacity as the sufficiency of organizational structure required to carry out its mission.

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Q21: Did the development and/or implementation of the survey involve any representatives from the professional field of volunteer administration?

A21: The survey method and instrument were developed by the Urban Institute in close collaboration with the Corporation for National and Community Service, the USA Freedom Corps and The UPS Foundation. The researchers also solicited and incorporated input on the survey instrument from an advisory council that included representatives from the professional field of volunteer administration. The process of designing the instrument also included cognitive interviews with three volunteer managers who gave extensive commentary on the survey instrument and its individual questions.

Q22: How accurate is it to make direct comparisons between the findings of congregational and nonprofit respondents?

A22: Because the research on congregations focuses on management of volunteers in social service outreach activities, the researchers are comfortable with making direct comparisons.

Additional Information

Q23: Is a copy of the survey instrument available for the public?

A23: Yes, a copy of the survey instrument can be found at www.volunteerinput.org as well as on the websites of the USA Freedom Corps, The UPS Foundation, the Corporation for National and Community Service and the Urban Institute.

Q24: Where can one go to learn more about how to manage volunteers effectively? What resources are available for practitioners?

A24: Following are a list of selected resources on volunteer recruitment and management:

Overall Volunteer Management Resources

Best Practices for Developing a Volunteer Program

<http://www.gov.state.md.us/volunteerism/publications.asp>

Online, ten-section guide from the Maryland Governor's Office on Service and Volunteerism. (*scroll down page to the topic "Volunteerism"*)

CASA Volunteer Management Resources

<http://www.casenet.org/program-management/volunteer-manage/index.htm>

This area of the CASA (Court Appoint Special Advocates) website offers articles on virtually every aspect of volunteer management, including recruitment, screening, retention and supervision.

Energize Volunteer Management Library

<http://energizeinc.com/art.html>

This online library – organized by topic and updated weekly – includes selected articles and book excerpts, detailed bibliographies, complete electronic books available for free, and annotated links to websites around the world containing strong volunteer management material or statistics on volunteering.

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Georgia Volunteer Program Management Manual

http://www.ltombudsman.org/ombpublic/49_507_1799.cfm

From the National Long Term Care Ombudsman Resource Center, this 7-chapter online manual was written for ombudsman programs but contains much generic information.

How to Recruit and Retain Volunteers

<http://nonprofit.about.com/library/weekly/aa090199.htm>

Includes tips on preparing for volunteers, keeping records of volunteers and their work, helping volunteers feel comfortable at their assignment, and showing appreciation for volunteers.

NSRC: Sample Forms Collection

http://nationalserviceresources.org/resources/sample_forms

Forms and documents for volunteer management. Includes everything from job descriptions to exit interviews. New forms are added regularly.

The Points of Light Foundation

<http://www.pointsoflight.org>

The Points of Light Foundation has many resources for volunteer organizations including books and materials to purchase and conferences and training events. In addition, there is a list of local Volunteer Centers available.

Recruiting Volunteers

<http://www.serviceleader.org/manage/recruit.html>>

This website leads directly to valuable content on volunteerism, including volunteer screening, matching, legal issues and risk management, online recruitment, and volunteer management software. Service Leaders is also the home of the Virtual Volunteering Project, with hundreds of ideas, tips, and real life examples for any organization that wants to involve volunteers via the Internet.

The UPS Foundation Best Practice Toolbox

<http://www.community.ups.com/community/philanthropy/toolbox.html>

The Toolbox provides a collection of tools designed by The UPS Foundation and select grantees to help manage volunteers more effectively and produce measurable results for communities in need.

USA Freedom Corps

<http://www.USAFreedomCorps.gov>

The USA Freedom Corps website is the most comprehensive network of volunteer resources and service organizations ever assembled. This White House sponsored website provides one-click access to information and resources related to such effective practices as mobilizing volunteers from both the non-profit and corporate sectors.

Volunteer Library

<http://www.sustainabilityonline.com/HTML/Volunteers/index.html>

The library includes a series of articles and additional resources related to working with volunteers and stakeholders.

Volunteer Management Review

<http://charitychannel.com/vmr.shtml>

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Charity Channel is an online community with over 100, 000 participants discussing every aspect of voluntary-sector issues in hundreds of forums. Subscriptions to and back issues of Volunteer Management Review are also available.

Volunteer Tools

<http://www.sustainabilityonline.com/HTML/Volunteers/index.html>

Tips and worksheets to help build better relationships with volunteers and stakeholders.

Specific Volunteer Management Topics

Creative Volunteer Roles

<http://www.energizeinc.com/art/npcrea.html>

This article by volunteerism expert Susan Ellis guides thinking regarding volunteer roles outside the box and in new directions. Several examples are offered and tips on how to apply these creative examples to an organization's initiative.

Retaining Volunteers/Keeping Volunteers Motivated

<http://www.serviceleader.org/new/managers/2003/04/000071.php>

Several links to online resources, from professional articles to tips from the field.

Retention and Recognition

<http://www.casenet.org/program-management/volunteer-manage/retenrec.htm>

This long excerpt from the book Volunteer Management, by Steve McCurley and Rick Lynch covers in detail the proactive steps organizations can take to motivate volunteers and ensure they feel valued.

Supervision

<http://www.energizeinc.com/art/subj/super.html>

This page includes links to articles and excerpts which offer tips on addressing problems with volunteers, maintaining open communication how to be an effective leader.

Volunteer Recruitment: Tips from the Field

<http://www.txserve.org/txcvcs/resources/volrec/recruit.html>

This website outlines four specific steps to a successful recruitment process. Hosted by the Texas Commission on Volunteerism and Community Service, it was developed by Sarah Jane Rehnborg, PhD. and Betsy Clubine.

Organizations Serving the Field

Association for Volunteer Administration

<http://www.avaintl.org>

AVA is the professional society for volunteer management practitioners and their website includes information on the annual International Conference on Volunteer Administration, a directory of local networks (DOVIAs), ethics in volunteer management, professional certification, and other topics.

International Resources

Volunteer Calgary Online Resources

<http://www.volunteercalgary.ab.ca/ResourceCentre/resources/index.html>

User-friendly articles and tips on all aspects of volunteer management.

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reCollections: Managing Volunteers

<http://amol.org.au/recollections/5/4/>

Australian site (for those working in cultural heritage preservation, but applicable to all) providing a practical guidebook, in chapter form, to good volunteer management, including a self-assessment quiz.

Northern Ireland Volunteer Development Agency

<http://www.volunteering-ni.org/inform/public.asp>

Extensive selection of free, downloadable publications, checklists, and tools for volunteer program managers.

Q25: Where can funders learn more about supporting effective volunteer management programs?

A25: In November 2002, The UPS Foundation, in collaboration with the Association for Volunteer Administration (AVA) and the Points of Light Foundation (POLF) released “*A Guide to Investing in Volunteer Resources Management: Improve Your Philanthropic Portfolio.*” This report was developed to help encourage businesses, corporate foundations and other grantmakers to evaluate their financial contributions as a means to help support volunteer resources management in local communities. A copy of the report can be found on The UPS Foundation website, at <http://www.community.ups.com/community/philanthropy/toolbox.html#guide>.