

# A GUIDE TO INVESTING IN VOLUNTEER RESOURCES MANAGEMENT:

IMPROVE YOUR  
PHILANTHROPIC PORTFOLIO



A GUIDE TO INVESTING  
IN VOLUNTEER RESOURCES  
MANAGEMENT:

IMPROVE YOUR PHILANTHROPIC PORTFOLIO



# DEAR COLLEAGUE:

---

We rarely underestimate the good that one individual can do for another person, a family, or a community when he or she volunteers. Why is it then that we in the philanthropic circles too often fail to appreciate the skills, planning, and support needed to harness the full potential of that volunteer?

From UPS's perspective, it comes down to effective human resources management. We are a company of more than 370,000 employees worldwide, but it is not necessarily the size of our employee base that contributes to our business success. It's about having the right tools, training, and systems in place to empower UPS employees to provide the best customer service.

This principle is just as relevant to nonprofits. Deploying large numbers of volunteers does not necessarily translate into success for the nonprofit or the community. Rather, success results when an organization mobilizes and manages its volunteer resources for the greatest possible impact on a problem or need.

In hopes of encouraging business and philanthropy to strengthen the capacity of their nonprofit partners to more effectively manage volunteers, The UPS Foundation is pleased to present this publication, *A Guide to Investing in Volunteer Resources Management: Improve Your Philanthropic Portfolio*, in partnership with the Association for Volunteer Administration and the Points of Light Foundation. Without a doubt, our collaboration with AVA and POLF in developing this guide has informed and advanced UPS's thinking around its investments in volunteer resources management.

I wish your organization all the best as it explores and, hopefully embraces, opportunities to build nonprofit capacity that maximizes the power of volunteerism.

Sincerely,



President, The UPS Foundation  
Vice President, UPS Corporate Relations

# TABLE OF CONTENTS

---

WHY IS VOLUNTEER RESOURCES MANAGEMENT CRITICAL?	3
THE CASE FOR VOLUNTEER RESOURCES MANAGEMENT	4
WHAT DOES THIS GUIDE OFFER?	5
KEY MESSAGES ABOUT EFFECTIVE VOLUNTEER INVOLVEMENT	5
ACTIVE SUPPORTERS OF VOLUNTEER RESOURCES MANAGEMENT	7
TAKING ACTION	9
ASSESSMENT TOOLS	9
STRATEGIES AND BEST PRACTICES CHECKLIST	10
QUESTIONS TO ASSESS ORGANIZATIONAL CAPACITY	13
ELEMENTS OF VOLUNTEER RESOURCES MANAGEMENT	15
INTERNET RESOURCES	16
WHAT DO YOU THINK?	18
ACKNOWLEDGEMENTS	19

## WHY IS VOLUNTEER RESOURCES MANAGEMENT CRITICAL?

Civil society and the concept of democracy in the United States were born from a spirit of voluntary action and a commitment to bring about change...to see a wrong and right it, to imagine what is possible and achieve it. The nonprofit sector provides some of the most meaningful models of what it means to live in a civil society.

Volunteers are fundamental resources for the nonprofit sector. The investment of human capital fuels much of the infrastructure that keeps nonprofit doors open and ready for business. Volunteering also is one of our nation's most accessible and effective ways of contributing to a civil society. Yet, finding support for the adequate management of volunteer resources is challenging for the sector.

Consider the resources a nonprofit organization usually has to support its mission: money, physical plant/buildings, employees, in-kind donations, gifts, equipment, and technology. Someone with specialized skills generally manages each of these resources, and all are considered during strategic planning.

The same should be true of the organization's volunteer resources. Unfortunately, the opposite is too often true.

The primary reason people stop volunteering is because of poor management, according to research conducted by UPS. As they are called upon to provide more and better quality services, nonprofits need volunteers now more than ever before. To optimize investment of volunteer time and build capacity within the sector, nonprofits must involve and manage volunteers appropriately and effectively.

As investors in the nonprofit sector, grant makers, businesses, and government must ask the following questions:

- How can we do more to support and build capacity within the nonprofit sector?
- How can we achieve a greater yield on the dollars and efforts we are already investing in the sector?

A critical and often overlooked response to these questions is to build greater capacity by supporting volunteerism and the infrastructure that sustains it.

### VOLUNTEERING IN THE UNITED STATES, 2000

(Source: Independent Sector)

Percentage of adults who volunteer  
**44%**

Total number of adult volunteers  
**83.9 million**

Average weekly hours per volunteer  
**3.6 hours**

Total dollar value of volunteer time  
**\$239.2 billion**

*Note: All volunteering numbers are for individual adults over the age of 21 who report service for an organization (excluding informal volunteering).*

### The average hourly value of volunteer time is \$16.05\*

Independent Sector, 2002.

*\* The hourly value of volunteer time is updated yearly by the Independent Sector and is based on the average hourly wage for nonagricultural workers, as published in The Economic Report of the President (2001 Edition), increased by 12 percent to estimate fringe benefits.*

**"Two out of five volunteers stopped volunteering because of poor management practices."**

*Managing Volunteers:  
A Report from United Parcel Service, 1998.*

Source: Association for Volunteer Administration, 2001.

5

**Competent leaders and managers build organizational and community capacity to maximize volunteer resources to meet community needs.**

4

Nonprofit and public organizations need help meeting this challenge. They must develop or enhance their capacity (skills, knowledge, abilities) to effectively recruit, focus, and support volunteer resources.

3

Mobilizing citizens to volunteer is very challenging in today's environment due to competition and lack of discretionary time.

2

Volunteers need support and leadership to be most effective and to sustain their commitment and involvement.

1

Volunteers are a necessary and critical resource for healthy communities. Volunteerism accomplishes real work, strengthens democratic and civic values, connects people, sparks creative problem solving, and supplements existing services.



## WHAT DOES THIS GUIDE OFFER?

Over 50 grant makers, nonprofit leaders, and corporate executives from across the United States contributed to the development of this guide. It provides a venue for funders, corporations, government, and other stakeholders, to learn more about how to invest in and support the structures that sustain effective volunteering.

Specifically, the guide provides:

- Key messages and talking points on what contributes to effective volunteer involvement
- Examples of investors in nonprofit and volunteer infrastructure
- Checklists of ways to support volunteerism and volunteer resources management in local communities
- Tools and information to assess a nonprofit's capacity for volunteer engagement
- Internet resources and other references for further information

## KEY MESSAGES ABOUT EFFECTIVE VOLUNTEER INVOLVEMENT

Nonprofits engage volunteers in a variety of functions. The organizations benefit overall when volunteers are well-managed and successful in their work. In turn, effective volunteerism yields benefits that extend beyond individual organizations – to the volunteers themselves, and the people and communities they serve.

Six key messages about effective volunteer involvement in nonprofit organizations emerged from research that contributed to this guide.

### **1 Effective volunteer involvement leverages and improves grant making and corporate community involvement.**

- When engaged effectively, volunteers augment an organization's financial and in-kind resources, producing greater value for each dollar invested.
- Volunteers can provide new or expanded services to increase the return on investment and add significant value to the objectives of a grant.
- Citizen engagement can be a key indicator of the health of both the nonprofit sector and individual organizations. Knowing what to look for in assessing how a nonprofit manages its volunteer resources provides grant makers and businesses with another observation and decision-making tool.

### **2 Effective volunteer involvement supports business objectives.**

- Supporting volunteering can help a company leverage and align its community relations, public affairs, and financial contributions to establish (or reinforce) a brand identity, company loyalty, and community goodwill.
- Employee involvement/volunteer programs build morale and loyalty, as well as provide opportunities for employees to share and develop their skills and expertise.
- Helping to build nonprofit capacity in managing volunteers is an important way that businesses can generate societal wealth—creating jobs, respecting the environment, and making other lasting contributions to the community.

## EFFECTIVE VOLUNTEER INVOLVEMENT:

- Leverages and improves grant making and corporate community involvement
- Supports business objectives
- Strengthens the nonprofit sector by increasing capacity to deliver services
- Requires specialized organizational and community infrastructure and support
- Requires ongoing training and development
- Contributes to maintaining a civil society

**"Increasingly, companies want to be seen as employers and vendors of choice. . . College recruits and potential clients want to know about a company's commitment to social responsibility . . ."**

— Corporate Leaders

**More than eight out of 10 companies report public relations benefits from established employee volunteer programs. Volunteering helped employees develop skills in 60 percent of the companies surveyed.**

— Points of Light Foundation, 1999.

**Volunteers are donors, too. Households in which the respondent also volunteered gave substantially more than households in which the respondent did not volunteer. For giving households, the average contributions were \$2,295 from volunteers and \$1,009 from non-volunteers.**

*(Giving and Volunteering in the United States 2001, Independent Sector)*

**"Some of the most cost effective dollars we can invest may be in a volunteer manager, who can generate far more value from volunteer hours than we ever invested."**

— Bruce Esterline, Vice President for Grants, The Meadows Foundation

### **3 Effective volunteer involvement strengthens the sector by increasing capacity to deliver services.**

- Effectively managed volunteer opportunities enhance a nonprofit's reputation in the community.
- Volunteers are not "free." The investment of volunteer time and energy, combined with the agency's investment in a volunteer resources manager enhances service delivery.
- Increasing the diversity of who volunteers and how they volunteer provides organizations with increased access to a broader range of perspectives, skills, and resources.
- Volunteers are donors, too. Financial contributors increasingly practice a blend of philanthropy and service in their nonprofit investments. Many of these donors come from family foundations, which contributed nearly half of all independent foundation funds and assets in 2000.

### **4 Effective volunteer involvement requires organizational and community infrastructure.**

- The organization's board, executive staff, and funders must consider support of the volunteer infrastructure to be as important as any other organizational resource.
- The ability to engage and retain increasingly diverse volunteers requires highly competent management. Agencies must assess what effective volunteer involvement means – or could mean – in their organization, and provide necessary staff support.
- A "one-size-fits-all" approach to supporting effective volunteering is not likely to succeed. Setting and location affect the various structures needed for citizen engagement within communities, nonprofits, foundations, and businesses in urban, suburban, or rural areas.

### **5 Effective volunteer involvement requires training and development.**

- Corporate and community volunteers who understand how to work with a nonprofit and what to expect in return are more willing to share their expertise and time.
- Training helps board members – many of whom are corporate and philanthropic leaders – and executive staff see that well-managed volunteers can increase an organization's service and fundraising capacity. When board members understand their roles, they can be more productive in serving the organization.

### **6 Effective volunteer involvement contributes to maintaining a civil society.**

- Grant makers, government, and business can meet their community involvement goals by supporting the structures and systems that enable more effective volunteering.
- When people know how to support their community, when it is easy for them to get involved, and when their experience is meaningful, they are more likely to continue volunteering.

## ACTIVE SUPPORTERS OF VOLUNTEER RESOURCES MANAGEMENT

Professionals in organizations of all types and sizes – from corporations and foundations, to government-sponsored programs – understand the value of effective volunteer resources management. The following examples demonstrate exciting ways in which a small sample of foundations and corporations are investing in volunteer resources management.

### *Meadows Foundation*

Based in Texas, the Meadows Foundation believes that volunteering is critical to the health of the nonprofit sector and that volunteers help maintain the spirit of philanthropy. Staff members are encouraged to volunteer in local agencies. The foundation also makes grants to encourage volunteering and to support effective volunteer resources management. Positions, such as directors of volunteer resources or development directors, can “help to expand the capacity of an organization...or to take a program to the next level,” according to Bruce Esterline, Vice President for Grants.

Supporting an organization’s personnel and systems is important, and “even a small grant with a few well-placed dollars can make a huge difference in strengthening the infrastructure,” says Esterline. “Some of the most cost effective dollars we can invest may be in a volunteer manager, who can generate far more value from volunteer hours than we ever invested.”

### *Robert Wood Johnson Foundation*

The Robert Wood Johnson Foundation has a long history of incorporating volunteerism to achieve its grant making goals. In the 1980s, RWJ fully funded 25 volunteer managers to run local Interfaith Volunteer Caregiver programs around the country. Another 100 groups started programs with volunteer leadership, but no paid staff. After three years, RWJ found that a large number of the all-volunteer sites had disbanded “because they could not sustain the organized effort required to mobilize, train, and manage volunteers long-term,” according to Paul Jellinek, Vice President of the Health Program Group.

In the 1990s, the foundation started utilizing seed grants, with a local match requirement, to fund 1,100 volunteer manager positions for its Faith in Action program. Eventually, this initiative will provide seed funds for over 3,000 volunteer manager positions. Based on the success of the program, Jellinek says “the services provided by volunteers...far outweighed the financial investment made by the foundation.”

### *EDS*

Accountability for volunteer involvement is important at EDS, a global technology firm. EDS aligns its community and volunteer involvement activities with its business strategy. As a result, volunteer involvement is a key element of the EDS brand around the world. EDS Global Volunteer Day, a worldwide celebration of the company’s volunteer efforts “demonstrates its desire to expand the spirit of volunteerism,” says Debbie Snyder, Director of Global Community Affairs.

EDS supports volunteering by providing resources to help ensure that employees have positive volunteer experiences. EDS proposal guidelines include questions



about the nonprofit's volunteer program and whether EDS employees are already involved with the nonprofit. EDS staff informally ask the executive director or project staff whether the nonprofit has the capacity to support the involvement of EDS employees. After a volunteer assignment is completed, EDS seeks feedback from employees to evaluate whether the nonprofit made effective use of the employees' time.

---

#### ***The UPS Foundation***

The UPS Foundation knows that its employees, like other volunteers, want their gift of time to make a difference. A UPS survey showed that most people who stopped volunteering did so because they felt nonprofits were not making good use of their time. The study also found that nonprofits face serious challenges beyond recruitment that affect their capacity to engage volunteers effectively or to sustain their involvement.

The UPS Foundation has invested more than \$10 million through its Volunteer Impact Initiative to help nonprofits meet growing demands for assistance by more effectively managing volunteers. In addition to providing grants that strengthen nonprofit capacity to recruit, manage, and retain volunteers, UPS supports professional development for volunteer and nonprofit managers, encourages corporate investment in volunteer management and, most recently, is helping to improve the effectiveness of disaster volunteerism. "Investing in volunteer management helps nonprofits better meet community needs," says Evren Cooper, President of The UPS Foundation, "and supports our employees as they help their neighbors."

---

#### ***Vermont Community Foundation***

The Vermont Community Foundation provides an example of how the infrastructure of civic engagement can differ in urban and rural areas. In less populated areas, support for volunteerism is often easier to achieve than might be expected. Because there are fewer people to provide volunteer services and fewer businesses to support those efforts, volunteering is everyone's business. David Rahr, President of the Vermont Community Foundation, says "people around here consider volunteering as part of their civic duty."

It is common for volunteers to staff fire departments, serve as emergency medical technicians, and sit on town councils, commissions, school boards, parent-teacher committees, and numerous nonprofit boards. "Getting release time (from local business) is not a problem here," according to Rahr. Nearly all activities funded or supported in this rural state typically address volunteering or nonprofit sector infrastructure in some way.

---

#### ***The Leighty Foundation***

Jane Leighty Justis is passionate about wanting other funders to know that "small amounts of money can make a big difference" in supporting volunteerism. For example, an organization can benefit from a grant of \$200 to send a volunteer manager to a workshop. Or for \$2,000, a nationally known expert can come to a community and train dozens of area volunteer managers.

The Leighty Foundation, based in Colorado, also invests in volunteer resources manager positions in area nonprofits. But first the foundation determines the organization's level of commitment to involving volunteers in agency operations. By requiring this information, the foundation ensures that an agency has the capacity to make the best use of the funds it invests. The result – "high impact for a small amount of dollars," according to Justis.

## TAKING ACTION

In spite of these and other examples, volunteer resources management still suffers from persistent under-funding. This is generally due to budget constraints, competing demands, and limited understanding and information about the costs and benefits of supporting volunteer infrastructure.

Grant makers, government, business, and nonprofits have to work together to increase awareness and support for volunteer resources management. In turn, the nonprofit sector must develop better ways to assess and report the impact of volunteer service. A standardized approach to assessing impact across all nonprofit organizations may not be feasible. Over-evaluation of volunteer impact using burdensome, quantitative methods is not appropriate when qualitative and anecdotal analysis would suffice. The need for more rigorous assessment should not impose additional barriers on volunteers or on the management of volunteers.

All sectors should take steps to build nonprofit capacity and to sustain and promote more effective volunteer involvement.

### **For the grant making, government, and corporate communities:**

- **Support research and evaluation** of the return on investment in volunteerism. This can be done in partnership with higher education and policy research centers, as well as with nonprofits.
- **Compile information** about corporations that integrate their volunteer activities with other community affairs and business initiatives. Organize the information by industry, size, or other categories to help organizations easily find applicable examples. Disseminate the information as widely as possible.
- **Collaborate** with local and regional grant makers and businesses to leverage their resources for greater impact in meeting nonprofit needs.
- **Provide models** of how companies can develop partnerships and collaborations with community organizations.

### **For the nonprofit community:**

- **Improve methods** used to measure outcomes and present a case for volunteer program support or to build organizational capacity.
- **Provide enhanced training** and development for board member volunteers, staff, and frontline volunteers.
- **Develop** a financial and programmatic analysis of the average cost to recruit, train, manage, and recognize volunteers in the organization.

*As the demand for nonprofit services increases, one way to help meet that demand is to engage more volunteers and maximize their contributions. This requires competent management of volunteers and adequate investment by corporate, government, and nonprofit entities.*

**"By enhancing an organization's capacity to skillfully involve community residents, we ensure that mission-focused work gets done within an accountable system and a positive, self-generating environment. This combination is what makes possible amazing, powerful results!"**

*— Katherine H. Campbell, Executive Director, Association for Volunteer Administration*

## ASSESSMENT TOOLS

The tools on the following pages are provided to assist both grant makers and grant seekers in assessing the overall capacity of a nonprofit organization to support volunteering. They are intended to encourage dialogue between grant makers, the leaders of nonprofit organizations, and the managers of their volunteer resources programs.



## 1 STRATEGIES AND BEST PRACTICES CHECKLIST

Support for volunteer involvement can take many forms, depending on the structure and culture of the organization. Use this checklist as a benchmarking tool or as a springboard of ideas on how to ensure effective volunteerism in an organization or a community.

### **Grant Making:**

- **Articulate values and beliefs** about volunteerism in the organization's mission statement and other written materials.
- **Inform prospective grantees** that evidence of a strong volunteer component, where appropriate, will be considered favorably in grant proposals.
- **Request basic information** in funding applications about a prospective grantee's volunteer program and how volunteers will be involved in the project.
- **Discuss** who will be managing and supervising volunteers and meet with appropriate staff during site visits.
- **Welcome** a budget line item to fund a volunteer resources manager.
- **Ask for feedback** in written reports or evaluations about the successes and challenges of involving volunteers.
- **Encourage staff** to volunteer in community-based organizations, so that they have intimate knowledge of what it takes to make volunteering successful.
- **Work closely with** the Points of Light Foundation and the network of volunteer centers, corporate volunteer councils, local United Ways and other federated campaigns, nonprofit management assistance programs, the Association for Volunteer Administration, and networks of directors of volunteer resources (DOVIAs), to support volunteerism and effective volunteer resources management in the community.
- **Collaborate and share information** with other grant makers in the community to leverage support and services for local nonprofit organizations.
- **Review the list** of organizations and projects currently funded. Are there coalitions or community-based collaborations on the list? If so, the funding source is already supporting an important type of volunteer program because successful coalitions and collaborations utilize volunteer resources extensively. Check to see whether these projects are supported by staff with strong volunteer management or community organizing skills.

Articulate  
Request  
Discuss  
Ask  
Encourage  
Work closely  
Review



## Research, Training, and Recognition

- **Facilitate or convene dialogues** in the community on nonprofit and volunteer management principles and best practices.
- **Involve grantees** in developing measures to assess the impact of investment in volunteering. Share those measures with colleagues.
- **Sponsor a survey** or case study on current management practices and/or challenges among nonprofit organizations.
- **Create innovation awards** for managers of volunteer resources who demonstrate unique approaches that address common management challenges.
- **Support** existing professional development, training, and networking opportunities for managers of volunteer resources. Provide scholarships to enable those managers to participate.
- **Partner with** other grant makers and corporations to pool financial resources that provide professional development opportunities for volunteer resources managers. Invite volunteer resources managers to attend in-house training programs or conferences.
- **Encourage academic centers** to improve their curriculum on volunteer or nonprofit management and corporate philanthropy. Provide applicable support.
- **Provide grants** to local libraries and volunteer centers to build their volunteer management collections.



## Employee Involvement/Volunteer Programs

- **State** the organization's values and beliefs about volunteer involvement in its mission statement and other written materials.
- **Assign a manager** to be responsible for and accountable to employee volunteers.
- **Walk the talk...** managers at the highest levels of the corporation should demonstrate commitment to the employee involvement program.
- **Involve employees** in determining what types of organizations and issues they would like to volunteer for or contribute to.
- **Ask** whether the nonprofit organization has a staff person who directs volunteer involvement. Work directly with that person in coordinating the efforts of employee volunteers.
- **Ask questions** about how employee volunteers will be mobilized for an ongoing volunteer opportunity or for a special event.

**Facilitate**  
**Involve**  
**Sponsor**  
**Create**  
**Partner**  
**Articulate**  
**Assign**



# Find Follow up Report Offer Provide

- **Follow up** with employees who volunteered for an event or project, either formally or informally. Ask them questions such as:
  - Would they volunteer again?
  - Did they feel their efforts had a positive impact?
  - Was the event or project well-managed?
  - How were volunteers welcomed?
  - In what ways did the experience meet their expectations or not?
- **Provide constructive feedback** about employees' experiences to the organization's director of volunteer resources (on what went well and what could be improved on both sides).
- **Provide networking** and other professional development opportunities in volunteer resources for staff who coordinate employee volunteering, community relations, and charitable contribution programs.
- As appropriate, **find ways to connect** employee volunteering, community relations, and contributions objectives.
- **Report on the outcomes** and reaffirm the company's value for volunteerism in annual reports, speeches, and corporate newsletters.
- **Offer incentives**, such as release time and matching funds, to foster participation in the employee involvement program.
- **Provide orientation and training** for corporate volunteers on how to be effective volunteers and corporate representatives. Make training available to all employees who volunteer, whether they provide direct services or serve on a board of directors.
- **Make management accountable** for supporting volunteerism as part of their business or community relations objectives.
- **Provide adequate resources** to support the employee volunteer program.





*Grant makers may want to tear out this page for use with grant seekers.*

Asking the right questions can help in three ways:

- Grant makers have specific information to use in deciding whether a request is viable and worthwhile.
- Grant seekers respond by assessing how their organization or program measures up to a set of generally recognized standards for volunteer involvement.
- Grant makers and grant seekers can initiate dialogue that plants the seeds for improved relationship-building.

The questions below may be used to assess an organization's overall capacity to manage volunteer resources and volunteer-based projects. Grant makers can learn much of this information by talking with the executive director and other project staff, including the director of volunteer resources. The answers should provide a relevant overview of an organization's capacity and readiness to engage volunteers and other community resources effectively.

### **Volunteer Involvement**

- How does the organization determine the best way to involve volunteers in meeting its mission?
- In what specific roles does the agency involve volunteers?
- To what extent does the volunteer pool reflect the diversity of the community it serves?
- To what extent does the volunteer board reflect the diversity of the community it serves?

### **Infrastructure**

- Is there a budget to support volunteer involvement?  
What percentage of the agency budget does it represent?
- Is there a volunteer administrator or community resources manager on staff?  
What is that person's experience or qualifications for the position?
- Do additional staff members supervise volunteers in the agency?  
If so, what training do they receive to prepare them to manage their unpaid staff?
- Are policies and procedures in place to guide the organization in engaging volunteers and other community resources?
- Are volunteer roles assessed for risk management purposes?
- What degree of coordination and communication exists between the agency's volunteer resources and development functions?
- Does the agency incorporate goals for involving volunteer resources into its strategic plan?

### **Orientation and Training**

- How are volunteers trained or oriented about their work and the agency?
- How does the organization train and develop its volunteer board of directors?

### ***Recognition***

- How are volunteers recognized for their contributions to the organization's mission?

### ***Impact and Evaluation***

- How does the organization evaluate the overall impact of volunteer involvement?
- What would the organization not be able to accomplish without volunteers?
- How many volunteers does the organization involve on an annual basis?  
How many hours of service do volunteers provide annually?
- How have volunteers contributed to the goals and objectives of the organization?
- What is the monetary value of the time given by volunteers annually?  
How does the organization determine this value?
- Is volunteer supervision a performance measure or accountability indicator for staff?
- Does the organization assess the performance and effectiveness of individual volunteers?

### ***Project Management***

- How will the proposed project involve volunteers?
- How many volunteers does the organization need for the project?
- Will other organizations provide volunteers for this project?
- Who will recruit and manage project volunteers?
- What percentage of time will staff spend managing volunteer resources?
- How will other staff ensure that volunteers are engaged effectively and have positive experiences?
- Is "volunteer resources management" included in the job description of any staff responsible for this function?
- Does the organization have a budget for volunteer resources management on this project?
- Is the volunteer plan realistic in terms of time and scope?
- How does the involvement of volunteers enhance or support the project goals and the organization's mission?
- What additional training, supervision, or evaluation strategies related to volunteer involvement/volunteer resources management will be used on this project?

### 3 ELEMENTS OF VOLUNTEER RESOURCES MANAGEMENT

Successful involvement of volunteers requires the basic components listed below.

Grant seekers can complete this assessment to identify the strengths and weaknesses of the infrastructure that supports their organization's volunteer efforts.

Elements of Volunteer Resources Management	Currently in place to some degree	Currently in place to a large degree	Not currently being done	Not applicable or not relevant
Written statement of philosophy related to volunteer involvement				
Orientation for new paid staff about why and how volunteers are involved in the organization's work				
Designated manager/leader for overseeing management of volunteers agency-wide				
Periodic needs assessment to determine how volunteers should be involved to address the mission				
Written position descriptions for volunteer roles				
Written policies and procedures for volunteer involvement				
Organizational budget reflects expenses related to volunteer involvement				
Periodic risk management assessment related to volunteer roles				
Liability insurance coverage for volunteers				
Specific strategies for ongoing volunteer recruitment				
Standardized screening and matching procedures for determining appropriate placement of volunteers				
Consistent general orientation for new volunteers				
Consistent training for new volunteers regarding specific duties and responsibilities				
Designated supervisors for all volunteer roles				
Periodic assessments of volunteer performance				
Periodic assessments of staff support for volunteers				
Consistent activities for recognizing volunteer contributions				
Consistent activities for recognizing staff support for volunteers				
Regular collection of information (numerical and anecdotal) regarding volunteer involvement				
Information related to volunteer involvement is shared with board members and other stakeholders at least twice annually				
Volunteer resources manager and fund development manager work closely together				
Volunteer resources manager is included in top-level planning				
Volunteer involvement is linked to organizational or program outcomes				

## INTERNET RESOURCES

The literature of the nonprofit sector has ample materials related to volunteerism and volunteer resources management. While this is not meant to serve as an exhaustive list, the home pages for the following organizations can provide links and referrals for additional research and information.

### Association of Small Foundations

[www.smallfoundations.org](http://www.smallfoundations.org)

See links to:

Home (Public Pages)

### Association for Volunteer Administration

[www.AVAintl.org](http://www.AVAintl.org)

See links to:

- Professional Issues
- Resources
- Calendar of Events
- AVA Products for the Professional

### Business for Social Responsibility

[www.bsr.org](http://www.bsr.org)

See links to:

- Resources
- Forum

### The Center for Corporate Citizenship at Boston College

[www.bc.edu/centers/ccc](http://www.bc.edu/centers/ccc)

See links to:

- Knowledge Center
- Diagnostic Tool

### The Center on Philanthropy at Indiana University

[www.philanthropy.iupui.edu](http://www.philanthropy.iupui.edu)

See links to:

- Publications
- Research Programs
- Conferences & Institutes

### Council on Foundations

[www.cof.org](http://www.cof.org)

See links to:

- Conferences & Workshops
- Publications

### Energize, Inc.

[www.energizeinc.com](http://www.energizeinc.com)

See links to:

- Hot Topics
- Bookstore
- Library
- E-Volunteerism

### Grantmakers for Effective Organizations

[www.geofunders.org](http://www.geofunders.org)

See links to:

- Resources (selected readings)

### The Grantmaker Forum on Community & National Service

[www.gfcns.org](http://www.gfcns.org)

See links to:

- Our Work
- Publications

### Independent Sector

[www.independentsector.org](http://www.independentsector.org)

See links to:

- Nonprofit Information Center
- Publications
- Nonprofit Pathfinder

### Points of Light Foundation

[www.pointsoflight.org](http://www.pointsoflight.org)

See links to:

- For Organizations, Businesses and Volunteer Managers
- Training & Events
- Research & Evaluation
- Sponsors & Partners
- Programs
- News

### The Volunteerism Project

[www.volunteerismproject.org](http://www.volunteerismproject.org)

See links to:

- Resources
- Publications
- For Volunteer Managers

### United Way of America

[www.unitedway.org](http://www.unitedway.org)

See links to:

- Programs and Initiatives
  - Outcome Measurement Resource Network
  - National Corporate Leadership
  - Public Policy Program

### The UPS Foundation

[www.community.ups.com](http://www.community.ups.com)

See the U.S. Community Relations (Volunteer Impact Initiative) link to download copies of:

- 1998 Volunteerism Survey
- Strategies for Effective Engagement of Volunteers: Second Edition
- Mapping New Routes to Volunteer Success

### Women's Philanthropy Institute

[www.women-philanthropy.org](http://www.women-philanthropy.org)

See links to:

- Resources & Articles



## WHAT DO YOU THINK?

This guide offers information and tools for grant makers, corporations, and government to assess the capacity of individual nonprofit organizations to engage and manage their volunteers. We hope it stimulates dialogue among businesses, philanthropies, and nonprofits. We want to know if we met that goal! Please take a few minutes to complete the following form.

**1** Do you represent a:

- a. ☐ Business/Corporation
- b. ☐ Foundation
- c. ☐ Government
- d. ☐ Nonprofit Organization

**2** Do you plan to apply or use any of the information in the guide in your grant making or corporate involvement/contribution efforts?

- a. ☐ Yes. If yes, how? \_\_\_\_\_
- b. ☐ No. Why not? \_\_\_\_\_
- b. ☐ Not yet
- d. ☐ Not sure

**3** Was the Internet Resources section helpful?

- a. ☐ Yes
- b. ☐ No

**4** What other ideas or new information can you share with AVA that has helped you support volunteer resources management?

---

---

---

---

Other comments:

---

---

---

Send this survey to AVA by mail:

Association for Volunteer Administration,  
P. O. Box 32092, Richmond, Virginia 23294  
or fax to 804.672-3368

or visit the AVA website at [www.AVAintl.org](http://www.AVAintl.org) to submit electronically

To request additional information about investing in effective volunteer resources management, contact AVA at [info@avaintl.org](mailto:info@avaintl.org) or call 804-672-3353

**Thank you!**

## ACKNOWLEDGEMENTS

The development of *A Guide to Investing in Volunteer Resources Management: Improve Your Philanthropic Portfolio* was made possible by the sponsorship and active support of The UPS Foundation and Association for Volunteer Administration, and collaboration with the Points of Light Foundation. The exchange of ideas and sharing of tasks to produce this document exemplify a partnership-in-action, which bears recognition here.

In addition, sincere thanks are offered to the grant makers, corporate foundation and workplace volunteer staff, and nonprofit leaders from the following organizations who so generously gave their time, thoughts, and assistance in the development of this guide:

Adolph Coors Foundation  
Albuquerque Community Foundation  
Aramco Services Company  
Association of Junior Leagues International  
AutoZone, Inc.  
Bell South  
The C, E, & S Foundation  
Citi Cards  
City of Coral Springs, Florida-Volunteer Services  
City of Phoenix, Arizona-Municipal Volunteer Program  
City of Plano, Texas  
CMS Panhandle Companies  
Community Foundation for the Fox Valley Region  
Community Foundation Serving Richmond and Central Virginia  
ConocoPhillips  
Corporate Community Relations Council of Houston  
Corporation for National and Community Service  
Council on Foundations  
The Dyson Foundation  
The Peter F. Drucker Foundation for Nonprofit Management  
Duke Energy  
EDS  
Educational Testing Service  
Ford Foundation  
General Mills  
Grantmakers for Effective Organizations  
Grantmaker Forum on Community and National Service  
Hext Foundation  
Hilton San Francisco

Thank you

Humboldt Area Community Foundation  
JPMorgan Chase  
KPMG  
The Leighty Foundation  
Metro Volunteers!  
New York Association for Volunteer Administration  
W.K. Kellogg Foundation  
Meadows Foundation  
Pitney Bowes  
Princeton Area Community Foundation  
Reliant Energy  
Rhode Island Foundation  
Robert Wood Johnson Foundation  
The St. Paul Companies Foundation  
San Antonio Area Community Foundation  
Sears, Roebuck and Co.  
Shell Oil Company  
Surdna Foundation  
U.S. Bancorp  
United Way of Metropolitan Atlanta  
United Way of the Texas Gulf Coast  
Volunteer Houston  
Vermont Community Foundation  
Virginia Dominion Power Foundation  
Virginia Foundation for Women  
Verizon Foundation  
Yardville National Bank

The UPS Foundation extends a special thank you to Project Manager Jackie Jordan-Davis; Paige Tucker, who artfully edited this guide; and Katherine H. Campbell, Executive Director of the Association for Volunteer Administration. Grateful acknowledgment is also due to the friends and colleagues who generously gave their time to review and provide critical feedback on each draft of this publication, hosted focus groups, and supported the overall development of the guide. They are: Nancy Murphy and Liz Bowden on behalf of The UPS Foundation; Pamela Warwick and Vicki Clark of the Points of Light Foundation; Jane Leighty Justis of The Leighty Foundation; Nora Silver of The Volunteerism Project; Jackie Norris of Metro Volunteers!; Jill Friedman Fixler; Susan Ellis of Energize, Inc.; and Debbie Breazeale of the Shell Oil Company. This guide represents the results of their collaborative efforts.