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From: Margaret Bailey, CHM and Kristine Komar, Double K Outfit

Date: September 14, 2009

Re: Research on Volunteer Management Models – Phase One

Cc: Hal Peterson/USFS; Ann Christensen/USFS; Liz Close/USFS

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1 Purpose of this Memo Report

1.1 The US Forest Service ("Forest Service") requested the services of PricewaterhouseCoopers and its subcontractor CHM and Double K Outfit, under BPA Call Number AG-9360-P-07-0076 - MOD 4, to prepare an Executive Summary Report on Alternative Models for Managing Volunteer Programs. The purpose of this memo report is to summarize the findings of interviews conducted with 17 nonprofit agencies and highlight components of these interviews that may be most applicable to the Forest Service. This work is considered Phase One of a multiple phase initiative focusing on Revitalizing the Forest Service Volunteer Program.

2 Summary of Findings

2.1 *Forest Service Partner Nonprofits*

2.1.1 **O&M Work versus a Stewardship Experience: A Misalignment of Expectations.** Consistently the interviewees identified that there is a misalignment between how the Forest Service and its nonprofit partners look at the work that is being accomplished. The majority of interviewees perceived the Forest Service as viewing volunteers as "a way to get work done". Volunteers however, view their efforts as a way to be "stewards" of the land. Specifically volunteers want meaningful work that provides them "experiences" with service, learning, and social opportunities included. For them the work is the means to the end, not the end. This was clearly articulated by an interviewee with the statement, ***"There will be projects until the end of time. We need to start looking at projects through the eyes of people's stewardship experience. People continuously and intentionally invest in stewardship."*** Another expression of the same sentiment, ***"The metrics need to change from hours and miles of trail to 'Did the experience make a difference for the land and for the volunteer?'"*** This is a foundational issue that needs to be addressed prior to any transformational changes in a Forest Service Volunteer Management model.

2.1.2 Working at the Landscape Level: Aligning around Community Defined Boundaries rather than Administrative Boundaries. The Forest Service partner nonprofits that were interviewed worked at different geographic scales than the Forest Service. At the local level nonprofits, which are supported by the community, typically work at levels that are relevant to the community (i.e. they work well when they address issues of interest to a community). Depending on the issue or topic, there are scales that move upward and downward to include more or less geography. The Forest Service works on an administrative geography that is relevant internally but is quite arbitrary to the external audience (e.g. similar to the experience the Forest Service has with watershed boundaries). When a nonprofit is aligned with the Forest Service administrative boundaries (e.g. Humboldt Toiyabe National Forest and their partner Friends of Nevada Wilderness or Region 5 and statewide non-profit partners) coordination can work fairly well. When the alignments do not match, there are typically challenges in coordinating efforts and/or issues that impact performance. Several interviews framed this similarly and one statement summarizes, ***"The Forest Service needs to think about how they work across Districts and Forests and get us and them aligned. They are stuck in the District/Forest model and we are working across Districts and Forests. Local personalities tend to get in the way of results. We have great perspectives to offer, we can help."*** Alignment of artificial Forest Service administrative units to nonprofits who generally have more community-based scopes will need to be considered in designing any future Forest Service volunteer management organizational structure.

2.1.2* Grants & Agreements: Financial Management Tools Aren't Working.** Financial sustainability of Forest Service partner nonprofits is a key element of the long term sustainability of a Forest Service Volunteer Management program. Consistently, the interviewees with Forest Service partner nonprofits found challenges working with Forest Service Grants and Agreements. Forest Service partner nonprofits recognized the need for the Forest Service to comply with applicable regulations and accurately account for financial resources; however, nonprofit partners see the current system being driven primarily by Forest Service needs, lacking an understanding of how nonprofits can deploy resources, and operating in an environment of regulation and enforcement rather than "how can we get this mutually desirable task/goal accomplished?" In addition, the G&A process tends to take so much time that many opportunities are foregone. An interviewee outlined this well when they stated, ***"The methods and time it takes the Forest Service to deal with money is frustrating. Our ability to leverage opportunities within the Forest Service Grants and Agreements process is not easy." How Forest Service Grants and Agreements support rather than hinders an expansion of the broader Forest Service Volunteer Management Program needs evaluation.

2.1.3* Volunteer Leadership: Responsibility and Advanced Training are ways to build Capacity and Commitment.** Partner nonprofits identified that working with the Forest Service should include at a minimum basic training and in many cases this was occurring. Additionally, the interviewees indicated that volunteers are eager to expand their skill sets beyond the basics and yet the Forest Service hasn't universally recognized the importance or the value of offering up collaborative and broad based training for its partners. An interviewee discussed this issue by providing an analogy, ***"Sometimes you don't need to know "how to build a boat" but need to learn how to "love the sea". Once someone loves the sea, they commit to building an amazing boat so they can spend time on the sea". In addition to added capacity, this training and ensuing increases in responsibility (more meaningful work and stewardship experiences) retains volunteers. One interviewee, not a partner, was explaining their strategy for rewards for and retention of volunteers (at the same time), ***'Last night was our annual awards banquet. We gave out our first 35 year pin and our first 15,000 hour pin.'*** Surely volunteers who receive 35 year and 15,000 hour pins must be the leaders! As Forest Service Volunteer Management models are designed, identifying methods to provide general as well as specific training opportunities as a way to build capacity and commitment should be evaluated.

2.1.4* Success: Now versus the Future.** Interviews with Forest Service partner nonprofits illustrate that important work is being accomplished by partner nonprofits. Additionally, the strategies that nonprofits have for organizing and accomplishing their work in conjunction with the Forest Service vary. However, as the Forest Service evaluates which of its nonprofit partners are "successful" and compares them to practices outside the Forest Service, it may begin to realize that "success" must look different. In other words, the Forest Service needs to make sure that success is determined by a set of criteria that it is interested in having others adopt. Several interviewees stated, "We are frequently asked to speak at conferences and share how and why we are successful."*** In the interim period, the Forest Service should celebrate its successes, but recognize that success may look very different in the future; therefore, working with current Forest Service partner nonprofits to move them beyond their current models will undoubtedly be required.

2.1.5 **Leadership: Helping Build Capacity of Partner Nonprofits.** Several interviewees spoke of the need to develop professionalism and capacity for their nonprofit organization. The Forest Service has an overlapping interest in this but does not usually engage in doing what it could to assist. There is a "no man's land" around this subject and interviewees were not specific about their expectations. The Forest Service typically has a "hands off" attitude toward nonprofits when it comes to organizational issues; however, it is in the interest of the Forest Service to find ways to support the ongoing professional development of their partner nonprofits. Business Volunteers for the Arts outlined this well when they illustrated that, ***"We require that new chapters (or franchises as they call them) complete a rigorous preliminary self-feasibility study to assess their capability to deliver on our organizations mission."*** This is a wonderful way to help local franchises, who operate very independently and are responsible for their entire operation including fundraising, get off to a great start as well as alert the home office staff how to offer support and mentoring as the group progresses. As Forest Service Volunteer Management models are contemplated, the Forest Service will want to work within their decision space to determine how to help leverage the capacity of nonprofits by examining how they can encourage and be involved in their development.

2.1.6 **Commitment: It begins at the top.** The Forest Service partner nonprofits identified that the Forest Service has a history of volunteerism and recognizes that volunteers are an essential part of the way the Forest Service can meets its mission. However, the partner nonprofits also identified that for major change in volunteer capacity to occur, the Forest Service needs to demonstrate a real commitment to Volunteer Management. This needs to go beyond "words" and move to "resource reallocation" (e.g., staff and budgets). This was stated by one interviewee as, ***"The Forest Service is not in the Volunteer Management business, but it thinks it is."*** Several partners stated that they felt they could help the Forest Service with management of volunteers. One particular comment sums it up, "***The Forest Service doesn't have to do management, we can. But they need to ensure that professional management is in place and that it is funded."*** A nonprofit interviewee spoke volumes about appropriate funding levels for volunteers when they stated, ***"Our Volunteer Program budget is $1million dollars out of a total Zoo annual operating budget of $27 million (3.7 percent)."*** The Forest Service partner nonprofits recognize that a significant shift would need to occur for a major commitment to happen. Additionally, they also realize that without this shift, the potential of their organizations passions and additional capacities will never be realized.

2.2 *Nonprofits Outside the Forest Service Realm*

2.2.1* Strategy: From Top to Bottom.** Universally, the nonprofit partners that we spoke with had strategic plans for their organizations that included specific goals and outcomes which included volunteers. Strategic objectives were linked to performance expectations for management staff. Additionally, if volunteer management was a key objective, position descriptions included volunteer management from the lowest to the highest staff levels. Several interviewees stated the concepts like, ***"Strategic direction keeps leadership and staff focused and must be embedded at each level, in order for long term success to occur." At the Oregon Zoo, the mission statement rolled off the interviewees tongue, ***"Our mission is: Inspiring our community to create a better future for wildlife. This is the mission for all of us, volunteers, staff everyone. The culture here is that volunteers are staff. Just unpaid."*** As the Forest Service evaluates its Volunteer Management model, it will need a strategy to guide its program and consider methods to integrate the strategy throughout the organization. This strategy needs to begin with a frank assessment of the "current state" a robust discussion of the "future state" desired and an acknowledgement of the"obstacles" that are in the way to achieving the future state.

2.2.2* Organizational Structure and Infrastructure Support: This Matters.** In order for nonprofits to be run efficiently, they commit to ensuring that their organizational structure is well developed and the infrastructure is in place to support the organization's execution. An interviewee framed this well when they stated, ***"Our organization is approaching its 20th year, but we are constantly evaluating if our organizational structure meets our needs, and evolving our infrastructure to support our organization." Nonprofits organizational structures begin with a Board of Directors (BOD) who understands and is committed to the mission of the organization. The BOD must commit their time, talents, and treasure (financial resources) to the organization's success. Beyond the BOD, an Executive Director, Development Officer and Program Managers are key positions for long term success. Infrastructure to support execution is critical including the systems for finance, legal, technology, communication, and training. Another interview identified, ***"We are approaching our 100th anniversary as an organization, and we have committed to redesigning our volunteer management organization from top to bottom. We believe this will take several years to do, but we are committed to making sure that we do it and constantly reevaluate where we are in the process to ensure we end up in the right place."*** Designing an organizational structure and committing to the necessary infrastructure to support the organization will be a critical element for consideration in a Forest Service Volunteer Management model.

2.2.3* What's next after the Baby Boomers? Organizations need to adapt to Volunteers, not Vice Versa.** The nonprofits interviewed clearly articulated an understanding about the changing nature of volunteering and the need for the Forest Service and their nonprofit partners to develop volunteer engagement models that meet volunteer needs. The Girl Scouts have articulated this well in their Core Business Strategy for Volunteerism by stating, ***"People are busy and getting busier". The Girl Scouts are focused on, ***"1) Developing Flexible service Pathways, from single events to year-long opportunities; 2) Easier, simpler entry into volunteer positions that includes matching a volunteer's interest and skills with appropriate opportunities"***. The Oregon Zoo reports, "***We have 500 youth volunteers. We have 200 Zoo Ambassadors (family volunteers) each summer and we've had programs for Community Volunteers, folks who can drop in to help out on their schedule, for 12 years."*** Each of these statements supports the premise that the traditional volunteer models are being "turned on their heads" and those organizations which adapt, will be in a position to take advantage of this talent pool. A new Forest Service Volunteer Management model needs to consider at its core how "volunteer needs and expectations" align with those of the "Forest Service" if it desires to have sustainable results.

2.2.4 **Fundraising: A Key Element for Sustainability.** Discussions with nonprofit partners reveal that dedicated Development Offices are a key to the success of nonprofits of a certain scale. For smaller nonprofits that work on a modest scale, development is handled by Executive Directors and Program Staff, but sustainability and capacity at the level needed and desired typically require a professional development staff and a sophisticated development program that is integrated into the overall program. A nonprofit Volunteer Manager interviewee outlined this well by stating, ***"We are responsible for outreach, engagement, connecting resources and providing infrastructure for volunteer success. Our Development team is focused on providing us the financial resources to ensure our success."*** In many nonprofits, volunteers are asked to play key roles in helping raise capital funds. ***"For the first time in 21 years, the 500 strong [Oregon] Zoo Guides volunteer group was asked to assist with capital fundraising for a major new exhibit to house lions, cheetahs, and wild dogs. Over 18 months our volunteers raised $210,000 toward the $5.5 million goal in addition to carrying the load of their regular duties. I cannot explain to you want a wonderful experience it was for all of us. We were a high performance team but we came together as a team in new ways—everyone was included--and felt a sense of pride we hadn't known before."*** Identifying how the Forest Service wants to leverage internal (APF) and external (contributed income) resources as well as staffing/partnering strategies to create a financially sustainable Volunteer Management model will need to be evaluated.

2.2.5 **Technology: Administrative and Web 2.0.** By definition, nonprofits align individuals with similar passions to achieve their organization's mission. The explosion of Web 2.0 social networking tools including Facebook, MySpace, Twitter, and Flickr, etc. are accelerating and expanding opportunities to expand the passions of individuals across a broader landscape. Nonprofits are beginning to leverage this technology for fundraising, advocacy, and community building. The nonprofits interviewed agreed that technology will never replace the importance of human relationships that exist between people in a nonprofit. However, most are evaluating the opportunity to leverage this technology to enhance their ability to meet their individual missions. This was summed up in part by an interviewee who stated, ***"We are now dealing with Generation "0" (Obama—not an age cohort but a vision cohort) and they are wired."*** In addition to Web 2.0 tools, high performance nonprofits press sophisticated IT technology and software into service for managing everything from accounting to volunteer management to fundraising. ***"At the Oregon Zoo we have touch screens at each of the six zoo entrances so that volunteers can check in and out easily. In addition, the reporting is accurate and hours are complied by the computer not another volunteer."*** Understanding the opportunities to leverage IT and Social Networking technology and which partner (e.g., Forest Service vs. Partners) is suited to leverage this technology is an element which should be considered within a Forest Service Volunteer Management model.

2.2.6 **The Courage to Speak the Truth: We're Broken.** Nonprofits are cursed or blessed, depending, on having to 'kill what they eat.' In other words, if they cannot make a compelling case to those they wish to serve and to their funders, they will begin to lose their constituency and/or their funding. At the present time, the funders (e.g., those that decide on the FS budget, internals and congress) may not be impressed with the case for the Forest Service Volunteer Program. Clients (e.g., volunteers) are increasing in number, but the capacity to serve them is not there. If the Forest Service were a non-profit, it would be at risk. Nonprofits that survive avoid this scenario by rigorous self evaluation and adaptation to existing conditions.

An example of an organization's willingness to self-evaluate and change was provided by the Girls Scouts who are approaching their 100 year anniversary in 2012 and coordinate over 900,000 volunteers. They were experiencing membership declines, recognizing shifts in populations and cultures and yet knew that their mission of developing girl's leadership was as important today as it was 100 years ago. They realized that if they continued on their current path they would end up not truly fulfilling their mission on the broadest scale possible. They committed to a ***"huge transformation in practically all areas, while keeping the focus on their mission and their strategic priorities of culture, brand, program, funding, volunteerism, and organizational structure, governance, and culture".*** The process began in 2004 and is anticipated to take another three years to fully execute. The Forest Service Volunteer Program is decades old and doesn't meet current needs. Considering a complete redesign would take an organizational commitment including leadership, resources and time.

2.2.7* Leadership: Nothing Substitutes.** Nonprofits interviewed expressed that top organizational and board leadership was an essential ingredient for a robust volunteer program. At the Oregon Zoo, ***'the Director speaks frequently to the volunteers about how urgently their service is needed and how valued and important they are to the success of the Zoo. The volunteers already love animals and he's offering them the chance to make a difference in the conservation of wildlife worldwide through the work of the zoo. The volunteers <u>know</u> they're doing something valuable." Having widespread Forest Service Leadership support for change in the Volunteer Program would be integral to supporting a major change in a Forest Service Volunteer Management model.

3 Project Steps

The project included the following steps. The key findings associated with each step are further presented and discussed in the sections below.

3.1 **Step One: Schedule and Facilitate a Conference Call to Refine Work Plan.** This step included developing a list of criteria for selecting volunteer groups, refining the list based upon input from Forest Service Regional Volunteer Program Leaders; undertaking general volunteer management research; developing and reviewing the interview questionnaire, confirming format of Executive Summary Report, and developing a work plan.

CHM undertook a multi-phased process for working with the Forest Service to develop a listing of interviewees for this project. The process began with providing a list of questions to the Forest Service to elicit ideas regarding possible Forest Service nonprofit partners they would suggest be interviewed. Additionally, CHM reviewed I-WEB Challenge Cost share data and provided to the Forest Service thoughts on possible Forest Service partners to consider based upon historic agreements with the Forest Service. Concurrent to the Forest Service partner identification, CHM undertook a broad based overview of volunteering in the United States to identify those nonprofit sectors for which volunteers are typically aligned in large numbers. We also looked at the Forest Service National Forest System program areas to prompt an understanding of what type of nonprofits could possibly align with the Forest Service program areas. From this research a total of 34 entities were identified as potential candidates for final interviews.

CHM then developed interview questions based upon: 1) Elements that the Forest Service desired to have addressed by the Statement of Work, and 2) CHM's experience in understanding the key elements of Volunteer Management. In reviewing the final questionnaire, the Forest Service requested CHM eliminate tactical oriented questions with the belief that as the work on the Volunteer Management model evolved, follow up with interviewees could occur on tactical related issues. The standard questionnaires used for the interviews are presented in the Appendix.

3.2 **Step Two: Conduct Interviews with Identified Nonprofit Groups.** This step included identifying the appropriate Point of Contacts; scheduling interviews, undertaking web research on the organization prior to the interview; conducting the interviews, documenting and collecting any additional information resulting from interview.

3.2.1 **Overview of Final Interviewees:** The Task Order requested that a total of 12 organizations be interviewed and from the listing of 34 candidates, a total of 16 interviews were conducted. The listing of organizations that were contacted by category is presented in the table below:

Exhibit 1: Listing of Nonprofit Agencies Interviewed

US Forest Service Nonprofit Partners	Nonprofit Partners
1) Appalachian Trail Conservancy	1) Business Volunteers for the Arts
2) American Hiking Society	2) EarthForce
3) Conservation Corps	3) Girl Scouts of America
4) Continental Trail Divide Alliance	4) Golden Gate Conservancy
5) Friends of Nevada Wilderness	5) LA County Museum of National History
6) Friends of Sedona-Red Rock	6) Oregon Zoo
7) Region 5 Trees and Trails	
8) San Bernardino National Forest Association	
9) Volunteers for Outdoors Colorado	
10) Washington Trails Association	

3.3 **Step Three: Prepare Draft Executive Summary Report of Key Findings.** This step included reviewing the interviews for key findings; comparing and contrasting responses from Forest Service Partners and Non Partners; evaluating findings in relation to general volunteer management trends and developing key report elements.

3.4 **Step Four: Incorporate Agency Feedback and Finalize Executive Summary Report.** This will involve receiving written feedback and edits for incorporation into the final document.

4 Overview of Interview Findings and Application to Forest Service Volunteer Management Program

The objective of the interviews was to identify practices existing within the nonprofits which could be considered by the Forest Service as it evaluates methods to improve and enhance its Volunteer Management Program. Recognizing the limited sample based upon the Scope of Work and budget, CHM recognizes that the interviews represent only a sampling of concepts and ideas for consideration.

To support these findings on a broader basis, CHM also identified a national survey completed in 2004 that speaks to the broader issues related to volunteer management. This first ever national study of volunteer management capacity was funded by the UPS Foundation, the Corporation for National and Community Service, and the USA Freedom Corps and was conducted by the Urban Institute, a nonprofit providing nonpartisan economic and social research at www.urban.org. The study drew on representative sample of charities and congregations. The study highlights the potential for nonprofits to use more volunteers, some challenges in doing so, and capacity-building options to reduce the hurdles. Many of these issues are similar to those facing the Forest Service. As our findings of the interviews are presented, correlations between our findings and the national survey are presented where relevant.

4.1 **Strategic Objectives:** Interviewees of organizations that had strategic plans included the role that volunteers play in achieving the organization's mission and integrated the mission objectives throughout their organization.

- Within the strategic positioning statement of Volunteers for Outdoor Colorado, the group has clearly defined their purpose in relation to volunteers, "The purpose of VOC is to inspire and create lifelong-citizen stewards through hands-on, outdoor volunteer experiences." They go on to state that, "VOC is in the business of creating lifelong stewards." This targeted action oriented statement clearly provides focus for the organization as it deals with its volunteers. Within its program focus goals are additional expectations, "VOC will create an integrated set of programs to achieve strategic goals and advance its mission. VOC will enhance the outdoor volunteer experience by adding value <u>before</u> and <u>after</u> each experience."
- At the Los Angeles County Museum of Natural History, the Museum's strategic objective for engagement and involvement of volunteers is taken from the strategy statement and is then embedded into the performance plan of management staff.
- At Golden Gate Conservancy, the management of volunteers is written into Position Descriptions at each level.

These organizations illustrate the concept that strategic objectives need to go beyond policy and be integrated into organizational functions.

The Volunteers in National Forest Act of 1972 authorized the Forest Service to "recruit, train, and accept without regard to the civil service classification laws, rules, or regulations the services of individuals without compensation as volunteers for or in aid of interpretive functions, visitor services, conservation measures and development, or other activities in and related to areas administered by the Secretary through the Forest Service". This enabling legislation clearly frames the ability of the Forest Service to use volunteers for specific as well as support of specific activities.

The Forest Service Strategic Plan for FY2007 to 2012 includes as a Management Principle "Partnerships". The Strategic Plan states under this Management Principle, "The breadth and scope of conservation efforts in the United States exceed the capability of a single organization. The Forest Service recognizes the challenge and actively seeks to engage others in cooperative

conservation. By working with partners, the Forest Service expands its capability to participate in conservation through stewardship, research and intergovernmental coordination." The existence of this as a key management principle provides a good foundation to build upon. However, as one further assesses the Goals, Objectives, Mission and Strategies, there is no clear description of the leveraging of volunteers.

The Forest Service Recreation Strategy includes linkages to the role of volunteers in meeting the Forest Service Mission in three places: 1) Core Values-(Connecting People with Nature); 2) Strategic Approach-(Partnering); and 3) in its element of Social Sustainability-(Citizen Stewardship and Strategic Partnerships). These provide a foundation to build upon. However, as the Forest Service works to further structure a Volunteer Management model, it will need to consider clarifying the strategic objectives for volunteers across the Forest Service (i.e. including and beyond the Recreation Program) and integrate goals and objectives throughout the organization including performance plans and position descriptions.

4.2 **Organizational Structure:** The organizational structure of the interviewees varied depending on the age, size and scope of the nonprofit. Small scale nonprofits had less defined organizational structures and frequently key staff members were volunteers versus paid staff. As the size of the organization grew, the number of paid volunteer management staff increased; however, how they chose to deploy the volunteer managers varied. The organizations appeared to have at a minimum a program management volunteer focus. Beyond this, typically the organizational staffing decision was made based upon whether volunteer management was going to be managed on the basis of scope or scale of volunteering and/or type of volunteering.

- The Golden Gate Conservancy (GGC) has designed their organizational structure to mirror that of the National Park Service (NPS) staff at most levels. Beginning at the Volunteer Management level, there are two Volunteer coordinators - one for the NPS and one for the GGC. Below this level, the NPS has one staff which focuses on a park-wide volunteer initiative and the GGC has three paid staff: 1) Large event coordinator who focuses on large events and large group participation; 2) Small group coordinator who focuses on groups of 50 or less, individual volunteers as well as weekly volunteers, and 3) A part time administrative staff who coordinates logistics, databases, and project postings. Below this level there are project leaders including paid staff from the NPS, GGC, and Presidio Trust who have the responsibility of coordinating volunteers at the project level. This organizational strategy focuses on program execution but also allows for a focus on the scale and type of volunteering.
- At the Los Angeles County Museum of Natural History, there is one Manager of Education who oversees volunteer management staff for Docents, Gallery, and Volunteers. Each of these staff positions oversees volunteers who serve in each of these categories of activity. They have structured volunteer management to the program area and nature of volunteer experience. (e.g., Docent Manager is responsible for overseeing volunteers who must go through significant training and deal specifically with school groups. The Volunteer Manager deals with episodic volunteers.)
- Girl Scouts of America operates at the National, and Council level and is working to define efficient Council level organizations to match their program execution models. Their recent Core Business Strategy has focused on "creating an efficient and effective organizational structure and democratic governance system." They go on to define elements under this strategy that include:

  - Building efficient, high capacity Girl Scout councils that provide a consistent Girl Scout experience to the girls they serve.
  - A collaborative partnership between national headquarters and a nationwide network of local councils to ensure optimal delivery of Girl Scout programs to our girl members and support to our adult volunteers.

- The San Bernardino National Forest Association has designed their organizational structure by Program Leads as has Friends of Sedona-Red Rock. In the case of SBNFA, the Program Leads are paid staff while the individuals at the Friends of Sedona-Red Rock are volunteers.
- The Friends of Nevada Wilderness have designed their organization to align with their Project Partners (USDA/USFS and DOI/NPS & BLM) as has the Appalachian Trail Conservancy with their Appalachian Trail Park Office.
- Very few Forest Service partner nonprofits dealt directly with Volunteer Coordinators at the District or Forest level. Frequently, Forest Service nonprofit partners indicated that the lack of dedicated personnel or regular staff focused on volunteer efforts hinders their nonprofits from maximizing their potential with the Forest Service. Additionally, several Forest Service partner nonprofits found that there was a misalignment between the Forest Service administrative units and the deployment capacity of the partner nonprofit.
  - Friends of Sedona Red Rock have historically worked closely with a District volunteer coordinator. Interviews with the District Ranger indicated that the volume of volunteer work supported the dedication of recreation fee revenue for the position.
  - At the San Bernardino National Forest Association ("SBNFA"), the Forest Service has a Partnership Coordinator and has also assigned staff to align with the various SBNFA program managers. The SBNFA indicated that they are an example of an organization which is aligned across a Forest to deliver services and yet within the Forest there are Districts whose priorities are not necessarily aligned Forestwide. This has resulted in implementation challenges on several SBNFA initiatives that work cross District boundaries.
  - Volunteers for Outdoor Colorado ("VOC") indicated that they are working with the Rio Grande District to pilot a Volunteer Coordinator to facilitate work with VOC. The District is providing salary plus management for the Volunteer Coordinator (a VOC employee) and the pilot has been committed to for 2-3 years.
  - Friends of Nevada Wilderness ("FONW") have structured their organization with a Project Manager to work specifically with the Forest Service. However, they also are challenged with being able to work in a focused manner with 10 Districts across a Forest within Nevada. They are also attempting to create a Volunteer Coordinator position on the Spring Mountains National Recreation Area which would be a FONW employee and whose salary would be paid through a combination of Forest Service (through a grant) and nonprofit resources.

- The 2004 Urban Institute Study identified that larger nonprofits/charities are more likely to assign paid staff to volunteer administration. The likelihood of this position increases as the size of the organization increases as seen in the chart below.

Exhibit 2: Type of Volunteer Coordinator by Size of Charity

Size of Nonprofit/Charity	***Paid Staff Volunteer Coordinator***	***Volunteer Volunteer Coordinator***	***No Volunteer Coordinator***
Less than $100k	50%	35%	12%
$100k to $500k	65%	18%	15%
$500k to $1 Mil.	65%	12%	25%
$1 Mil to $5 Mil	78%	5%	15%
More than $5 Mil	80%	5%	15%

Source: UI, Volunteer Management Capacity in America's Charities and Congregations

- The 2004 ULI Volunteer Management Study also identified that many nonprofits have or are considering the addition of a one-year, full-time volunteer with a living stipend (e.g., AmeriCorps or SCA member), with responsibility for volunteer recruitment and management. This issue is one that the Forest Service should continue to evaluate the pros and cons of as they evaluate staffing options for volunteer management.

As the Forest Service evaluates its organizational structure for deployment, interviews and research would appear to suggest at a minimum that core staff is dedicated to volunteer management. The location of these staff and functions of these staff will need to be determined following further evaluation depending on the program and scope and scale of work to be accomplished in various areas of the Forest Service.

4.3 **Infrastructure (Fundraising & Technology):** The interviews illustrated the key connection between organizational structure and program delivery through effective infrastructure support. For discussion purposes, we have grouped fundraising and technology under this one category; however, organizational structure and program management are also part of infrastructure in order for an organization to deliver against its mission and we have addressed these two areas separately.

The relationship between investments in infrastructure to support volunteer management was evaluated as part of the 2004 Urban Institute ("UI") Volunteer Management Study. The study attempted to evaluate, "A Measure of Investment in Volunteer Management" based upon a triangulation of several survey question responses. They expected to find that nonprofits/charities that invest in volunteers will be those that derive the greatest benefits from volunteers. UI's comparison of the investments measure and the benefits index did in fact bear this finding out. Their correlation coefficient indicated that there was a moderate positive relationship between investment in volunteer management and the perceived benefits of volunteers. They concluded, "The belief that volunteers are beneficial leads charities (e.g., nonprofits) to invest in their management of volunteers and that investment in the management of the management of volunteers leads them to value the benefits of their volunteers more." In essence a closed continuous feedback loop appears to be created. More details on the specific level of return on this investment can be found in the UI summary findings report in the Appendix.

In our interviews, the discussion of infrastructure varied depending on the interviewee. On the nonprofit side, the interviews focused on the leveraging of technology for the components of volunteer management as well as what role volunteers played in fundraising. The Forest Service partner nonprofits discussion expanded to include Grants and Agreements. Questions were asked of each nonprofit regarding the role of volunteers in fundraising for their organization as well as how development work was done for the nonprofits. The purpose of these questions was to illustrate the importance of financial sustainability as well as various methods to achieve it.

4.3.1 **Fundraising**

- Interviews indicated that as the size of the nonprofit increased, the role of a professional Development Director to support fundraising was evident. The smaller scale nonprofits did not have a Development Director. Typically Development work was handled through a combination of Executive Director and Program Management staff.
- Program Management staff fundraising development work rather than a dedicated Development Officer was the case with many of the Forest Service partner nonprofits. Several of the other Forest Service partner nonprofits work actively on grants as a part of their fundraising where the Forest Service provides the matching requirement.
    - The San Bernardino Forest Association is working toward supporting a dedicated Development Officer as part of their short term strategy. However, in the mean time, each Program Manager is tasked with coordinating fundraising efforts including grants, and contributed income. While this model provides for creative fundraising options, it does not allow for the sophisticated strategies that focus on large scale contributed income initiatives, seeing individual wealth, developing endowments, etc. It also requires results in program management staff requiring additional coordination with Forest Service staff.

- Interfacing with the Forest Service for coordination of agreements and funding through the Grants and Agreement (G&A) process was identified as a major hurdle with most of the Forest Service partner nonprofit interviewees. Issues include:
    - <u>Inconsistency:</u> G&A staff is accessed through Districts, Forests, and Regions with G&A officers at each level and location responsible for interpreting regulations. This results in a wide range of answers to the same question or situation, which is very frustrating and difficult for partners to understand. G&A officers have a legal authority so their decisions cannot be dictated by a line officer.
    - <u>Availability:</u> Like most other Forest Service staff, there is less and less time for G&A specialists to devote to working with people, especially with non-agency people. There is also frequent priority projects put on the G&A staff, especially as new accountability systems are introduced or special projects (e.g., stimulus package) come along. A timely response is often needed to take advantage of opportunities that emerge and the G&A staff timeline and workload may not allow for this as the highest priority.

- Approach: Not all, but many G&A specialists seem to look for the 'no' rather than for the 'how can we make this work.' This is frustrating but somewhat understandable as G&A specialists have special authority training and are accountable to the regulations.
- A Partnership: Partnership and G&A Staff On units where the G&A specialist is most supportive of volunteer and partnership efforts, there is also a Partnership Coordinator or other 'advocate' on the unit. Driven by the goal to create useful and meaningful partnerships, the Partnership Coordinator can assist and communicate well with the G&A specialist and working together these two positions make a good team. But not all units have the luxury of both positions.
- A Larger Issue: This issue has been with the Forest Service as long as it has dealt with partners and community groups. There is awareness on the part of leadership that there are issues. A robust and sustainable Forest Service Volunteer Management model will need the support and good work of G&A specialists to make it successful.

- Responses to the question of do volunteers assist with fundraising was universally that first and foremost, nonprofits recognized and valued "time" resources" being offered as much as "financial resources" offered by volunteers. It was often stated that volunteers needed to invest in specialized clothing and equipment to volunteer (e.g. hiking boots, gloves) and that they used their own vehicles and gas to travel to work sites. Most of the organizations did not want potential volunteers to opt out for financial reasons. This also goes to mission for many of the groups (e.g., first they must *love* the land, *and then* they will want to take care of it). Giving is a part of taking care of. Among the small group of interviewees, approximately 40-60% of volunteers seemed to become members and make financial contributions. It was also true that those nonprofits which had longer-term volunteers found that their volunteers almost always make financial contributions, sometimes at very generous levels. Many nonprofits interviews outlined that their communications strategies include encouragement of "membership" in their organizations. Once a member, volunteers receive other seasonal or campaign fundraising requests. Only one nonprofit interviewed, the Oregon Zoo, had involved their volunteers in a major key fundraising campaign. This is much more typical of more mature organizations and those outside the land management arena. Like responsibility and training, giving becomes more attractive when volunteers are serving at a 'deep' level. Gifts of money, in many ways it can be given (e.g., from membership to capital, endowment, and life gifts) and becomes a way to extend service beyond the individuals' labor to others, to the future, to secure the mission. As the Forest Service contemplates reinvigorating its Volunteer Management model, it can learn from those nonprofits where volunteers are also significant givers. Clearly, the job of soliciting and stewarding financial gifts would fall to partners, but it would be shortsighted not to understand the spectrum of fundraising opportunities.

4.3.2 **Technology**

- Interviews with nonprofits regarding their use of technology spanned a range of usage but most nonprofits used technology in ways which "enabled" them to execute on their administrative or program management responsibilities in order to achieve the nonprofits mission. Technology was viewed as an "enabler" to work getting done, not an "impediment".
- Back office technology infrastructure included software to recruit, manage, train and report on volunteer activities. Several nonprofits mentioned using Volgistics and VolunteerWorks to manage their volunteers and several created standalone systems. In January 2009, Volgistics and VolunteerWorks joined forces. Organizations that currently have VolunteerWorks support service will be supported by Volgistics over the course of the next year. Specifically, these types of software packages are web based and typically allow for:
    - Recruiting: Online application forms and opportunity profiles from an organizations web site or linkages to and through other organizations websites. These sites also allow volunteers to check their profiles, schedules and history.
    - Managing and Reporting: Nonprofit managers are able to have in one place basic address information and demographics; availability, skills, hours (and other measures of service); training, certifications; emergency contacts; references; employers; and, current and past assignments. They also provide the functionality to print schedules, lists, labels, profiles, and service reports.
- An example of a customized structure is the commitment of the Appalachian Trail Conservancy to launch a new volunteer management technology this Spring for their member clubs. In response to both club and national organizations needs, the ATC developed a system that has several standard fields and many customizable options. ATC will be providing access to the Appalachian Trail Park Office, which will allow their federal partners to access information on their program of work and volunteer programs. In addition to recruitment and management from this site, the technology also allows for a robust training capability. The training for the new technology will be occurring over a WEBEX platform.
- The Girl Scouts have weaved the application of technology into both their program delivery strategy as well as their organizational infrastructure. The availability of technology for training, development and outreach are influencing the organizational design at the Council level.
- The Golden Gate Conservancy and Region 5's, "Trees and Trails" Initiative spoke about the value of providing "Academy" training opportunities. Currently at Golden Gate, many of these training opportunities are provided in person, which provides for development of relationship and trust between agency representatives and nonprofits. However, as organizations make decisions for training and development, web-based learning is being considered.
- Beyond administrative and program support, the emerging issue with technology was the application of Web 2.0 technology to expand into Social Networking opportunities. The interviewees were aware of this emerging field and several had created either MySpace or Facebook pages for their organizations as a component of their WebPages. Several nonprofits leveraged this technology for their youth and young adults for creating web

based communities of interests. The nonprofits recognized the significant growth of Web 2.0 but most were struggling with understanding how to leverage its potential. The nonprofits were eager to gain knowledge in the very short term to begin to understand this landscape so that they could identify ways to benefit from it.

4.4 **Programs/Activities:** This section of the interview focused on the existence of policies and procedures to guide programs and activities which nonprofits deliver through volunteers in alignment with their mission. The interviews were focused at the "macro" level versus "micro" level. It was determined that this section of the questionnaire could be further expanded upon during later phases if the Forest Service wanted to understand unique attributes of any of these questions. As such, we have chosen to group several of the questions into subcategories for reporting purposes. These are:

- Volunteer Recruitment, Interviewing, Screening and Matching
    - The nonprofits interviewed had two models that they deployed for this portion of program management. The smaller nonprofits indicated that recruitment occurred in part through word of mouth from existing volunteers or outreach efforts and then interviewing, screening and matching were frequently done on a one-on-one basis. Under informal recruiting situations, most volunteers match themselves appropriately with volunteer opportunities. Those organizations which had technology platforms for this process have shifted this function to occur through their technology portal. The benefit of this is by having the front end technology portal quickly identify a "match", and a volunteer can quickly become "connected" to the nonprofit organization and see their skills as valuable to the organization. Additionally, the technology permits volunteer managers the ability to assess in an efficient manner the alignment of skills and organizational needs as well as create the opportunity to initiate immediate contact with the volunteer.
- Volunteer Training, Support, and Supervision
    - Interviews indicated that this is an area that involves both a mix of personal and technological solutions. Program management training strategies varied tremendously across the interviewees. This was primarily due to the nature of the mission of nonprofits. Many of the most inspiring stories occurred during discussions around these questions. When interviewees were asked what inspires them to continue their work, they indicated it was the interaction and supervision of their volunteers that provides them their greatest motivation.
    - Many of the Forest Service partner nonprofits indicated that the Forest Service was supportive of basic safety training for their partners. Beyond this, many indicated that they did not receive any support for additional technical training that many partners realized that the Forest Service staff typically attends. This is in direct contrast to several nonprofits who viewed ongoing skill development training as a method to create trust between nonprofit staff/volunteers and the nonprofit, as well as increase the professional capabilities of the volunteers to better meet the nonprofit's mission.
        - The Los Angeles County Museum of National History integrates volunteers into program staff training. The general docent model in museums is built around the concept that volunteers undergo rigorous training over a sustained period to allow Docents to appropriately teach visitors about the museum collections.

- The Earth Force program mission is to engage young people as active citizens who improve the environment and their communities now and in the future. Oddly, though, they do no work with young people. Their different model for training sets them to work with teachers who in turn work with young people. Teachers then become Earth Force's 'volunteer' workforce. Earth Force staff work "deeply" and intentionally in schools (one staffer generally supports teachers in only 3 schools) to offer coaching and mentoring to teachers so that they can help students develop 21st century skills including teamwork, problem solving, and group decision making. The beauty of this training concept is that it is additive, providing a process that meshes with existing content. The training and development received by children is highly valued in their communities. In the Denver Metropolitan Area, Earth Force's program was selected by the City to be a key partner in water quality monitoring. This included the leveraging of children for monitoring!
- The San Bernardino National Forest Association's Off Highway Vehicle Program has established their volunteer management program to align with a graduated skill and authority model over a period of time. They evaluated the FEMA model for training of emergency volunteers which is based upon the concept that specific, graduated and sustained volunteer training increases skills and commitment from volunteers.
- Several of the trail-based nonprofits discussed the trust that has been created between their federal agency partners and the nonprofits for this specific skill area. Based upon this trust, successful volunteer management and supervision has been accepted by the federal agencies for trail work.
- The Girl Scouts are building into their Council organizational structure a Coaching position which provides support to volunteers at the middle-management level. This is being done so that this level of supervision has someone to turn to as they deal with issues that they are unfamiliar with as well as to provide them the opportunity to develop professionally.

o Risk Management came up on several interviews as Forest Service partner nonprofits were discussing their ability to expand their volunteer base into new program areas as well with new populations. The Volunteers in the National Forests Act of 1972 (PL 92-300) authorizes volunteering on National Forests and directs the Forest Service to make maximum use of their authority. It proscribes that the Forest Service shall provide tort, liability, and workers compensation coverage for any volunteer under an official volunteer agreement. Each unit is responsible for their own volunteers, so a Ranger District could be responsible for paying a lifelong claim for full disability for an unfortunate accident.

Interviewees indicated that this situation provides a deterrent to risk taking when it comes to authorizing volunteers in general, or to use their own equipment, or engage in behavior that is deemed risky (e.g., working in a fire lookout, skiing as part of winter sports host duties, supervising young people, riding an ATV, motorcycle, or horse or operating a chain saw or trail maintenance equipment). The interviewees recognized that to reduce risk, partners are often asked to provide volunteers through the non-profit. The nonprofit is then responsible for deciding if it is going to proceed without coverage or raise money to pay for

volunteer insurance and workers compensation. While it appears that the issue of risk management has been addressed for trail crew work based upon safety standards developed, interviewees indicated that there is a lack of clarity and commitment to solving this issue in a thorough fashion to serve both partner nonprofits and the Forest Service. As the Forest Service contemplates updating and reinvigorating its Volunteer Management model, development of consistent and secure risk management procedures will be a critical component.

- Volunteer Recognition and Affiliation/Attachment
    - The nonprofits made it clear that the appropriate way to recognize a volunteer is to begin with a simple thank you. Beyond this, they outlined an array of programs and activities that matched the nature of their organization. Several recognized that even the most basic method of recognizing a volunteer needs to be taught to individuals who are managing volunteers.
    - Affiliation and attachment of volunteers to an organization came primarily by ensuring that the work to be completed provided for a "meaningful volunteer experience". Also, based upon the wide variety of types of volunteering and array of interactions, Volunteer managers were very sensitive to keeping track of the satisfaction of the volunteer in relation to the volunteer experience. Interviews identified that additional ways to create affiliation include the creation of combined work spaces, work opportunities, uniforms, pins/badges and other wearable totems of achievement and training opportunities for further knowledge expansion both directly and indirectly related to the volunteer's interests.

4.5 **Innovation and Change:** This series of questions was asked to assess emerging trends in volunteer management as well as to understand the readiness of the nonprofit to deal with these trends. The consistent feedback from nonprofits was the changing nature and expectations of volunteers and the need to adapt to their Volunteer Management model to meet these trends. The changes in the nature of volunteers included:

- Age Cohorts: women and retirees have been the backbone of volunteer cadres for decades. Women have been less available since two income families became the norm. Current baby boomer retirees are plentiful and will be for the next decade or so. They are interested in volunteering and respond well to a command and control program management style. Cohorts after the boomers have much different styles. Social interaction is critical. Occasional, intermittent, episodic, project-related, or seasonal, rather than routinely volunteering is preferred. More and more families are interested in volunteering together as are workplace groups. The current economy and support of volunteering by the President and his family have generated a sharp spike in volunteer interest. Shifts in lifestyles, values and the continuing emergence of new and different age cohorts will continue to require volunteer management adaptations for maximum success.
- Culture and Ethnicity: new populations which look at volunteering from a different perspective (e.g. "helping vs. volunteering"), differing interests from local cultures, and a variety of responses to a wildland setting and the stewardship of land and natural resources;
- Skill Sets: technical and non technical, staff and management;
- Methods of Volunteering: individually, small social groups, companies, family units; and,

- Frequency of Volunteering: hourly, daily, weekly, annually (e.g., episodic vs. ongoing), project related; as well as increase in strategies surrounding Voluntourism; and,
- Motivation of Volunteering: traditional, social change, entrepreneurial; and serendipitous.

Additionally, the interviewees recognized that despite the importance of each nonprofit adapting to diverse volunteer needs, nonprofits do not overlook that individuals are drawn to nonprofits based upon each unique nonprofit's mission, and also gain significant value by working within a community of volunteers. This sense of community and purpose is a key nonprofit attraction which volunteers desire. As the Forest Service frames its future Volunteer Management model, it should recognize that volunteers are first and foremost committed to the stewardship mission of the Forest Service. Determining methods of creating communities of stewards should be a key objective of any Volunteer Management model redesign.

4.6 **Forest Service Partner Nonprofit's Perspectives:** Four questions were developed to gain feedback from Forest Service partner nonprofits regarding obstacles in working with the Forest Service and methods that the partner nonprofits could offer to deal with these challenges. The responses centered primarily on obstacles to success; however, the partner nonprofits were passionate about the Forest Service mission so they had a high willingness to adapt to challenges.

- The following are several of the obstacles identified by partner nonprofits that are working with the Forest Service:
  - Non-availability of staff to focus on Volunteer efforts;
  - Non-integration of partner nonprofits capabilities into the Forest Service's annual program of work in a collaborative method;
  - Lack of Forest Service recognition of the array of talents that the volunteers could bring to the Forest Services' mission;
  - Significant challenges with execution with increasing rigid, and unavailable Grants and Agreements staff;
  - Misalignment of nonprofit's organization and execution models and the Forest Service's administrative units;
  - Forest Service's non recognition of the changing nature of volunteers;
  - Forest Service's challenge in accepting that the "stewardship passion" of volunteers can match that of the Agency stewards;
  - Challenges with Insurance for changing types of volunteers (i.e. ,Risk Management)
  - Inconsistency on policies (G&A, volunteer, use of equipment, etc.) across Districts, between Forests and across the country.
- When asked what role that partner nonprofits can play in assisting the Forest Service in planning and implementation of a new Volunteer Management model, the interviewees responded that they stood willing to work collaboratively with the Forest Service through any redesign process. Additionally, they believe they have much volunteer management knowledge and experience to bring to the table. Many were eager to be "pilot cases" for trying out new ideas. The commitment to improving the Forest Service was significant from the interviewees. No organization framed out a solution but many believed that their organization could provide an example of an element that could be evaluated. The interviewees did appreciate being considered for their input and were eager for the

Forest Service to continue their focus on improving the Volunteer Management model in a new and different way than how it is currently executing. With respect and good humor, they offered that they really enjoyed talking about the volunteer program but would like it even more if the talk moved to *action*.

5 Additional Action Items/Research Findings for Consideration

As stated in the introduction to this Executive Summary Report, this Phase One Analysis was meant to provide a "window" on practices which other nonprofits use for Volunteer Management. A stated objective of the research was to, "simply help expand our Agency's view of the possibilities and the components which nonprofits are using that may have relevance for the Forest Service."

It is the hope of CHM that the "window" which has been opened has provided an inviting view for consideration. The CHM project team was inspired by the individuals with whom they spoke. Many nonprofit interviewees are interested and willing to share their knowledge with the Forest Service. CHM recognizes the Forest Service has viewed this as Phase One in a multi-phase process and the CHM team stands willing and interested in continuing to work with the Forest Service on this important and compelling initiative.

6 Assumptions and Limiting Conditions

Our Services were performed and this Report was developed in accordance with USFS BPA Call Number AG-9360-P-07-0076 - MOD 4, USFS and are subject to the terms and conditions included therein.

Our services were performed in accordance with the Standards for Consulting Services established by the American Institute of Certified Public Accountants ("AICPA"). The procedures we performed did not constitute an examination or a review in accordance with generally accepted auditing standards or attestation standards. Accordingly, we provide no opinion, attestation or other form of assurance with respect to our work or the information upon which our work was based. We did not audit or otherwise verify the information supplied to us in connection with this engagement, from whatever source, except as may be specified in this Report or in our Task Orders.

The Services did not include the provision of legal advice and we make no representations regarding questions of legal interpretation. Client should consult with its attorneys with respect to any legal matters or items that require legal interpretation, under federal, state or other type of law or regulation. Changes in the law or in regulations and/or their interpretation may take place after the date that our engagement commences, or may be retrospective in impact; we accept no responsibility for changes in the law or regulations or their interpretation which may occur after the effective date of our engagement.

This report references and uses information provided by other contractors to the Forest Service. We provide no opinion, attestation or other form of assurance with respect to the work of these contractors.

Our work was limited to the specific procedures and analysis described herein and was based only on the information made available through March 31, 2009. Accordingly, changes in circumstances after this date could affect the findings outlined in this Report.

Our analyses are based on estimates and assumptions developed in connection with the Task Order to provide these services. Some assumptions, however, inevitably will not materialize, and unanticipated events and circumstances will occur; therefore, actual results achieved during the period covered by the accompanying market analyses will vary from the estimates contained therein and the variations may be material.

This report and all deliverables are solely for the U.S. Government's internal use and benefit and are not intended to nor may they be relied upon by any other non-governmental party ("Third Party").

Appendix 1 – Listing of Nonprofit Interview Candidates

Organization	American Hiking Society
Name/Title	Andrea Ketchmark, Volunteer Program Manager
Contact Information: Phone and email	800 972-8608x206, aketchmark@americanhiking.org
Organization's web site	http://www.americanhiking.org
Organization	Appalachian Trail Conservancy
Name/Title	Jeanne Mahoney, Volunteer Resources Coordinator
Contact Information: Phone and email	304 535-6331 x107; jmahoney@appalachiantrail.org
Organization's web site	http://www.Appalachiantrail.org
Organization	Business Volunteers for the Arts
Name/Title	Valerie Beaman, VP of Private Sector Initiatives; Julie Peeler, PSI Coordinator
Contact Information: Phone and email	202 371-2830
Organization's web site	http://www.artsusa.org/information_services/arts_business_partnerships/programs/business_volunteers_for_the_arts/default.asp
Organization	CDT
Name/Title	Teresa Martinez, Dir. of Field Ops,
Contact Information: Phone and email	303 838-3760, teresa@cdtrail.org
Organization's web site	www.cdtrail.org
Organization	Earth Force
Name/Title	Lisa Bardwell, CEO
Contact Information: Phone and email	303 433-0016 x6, lisa.bardwell@ef-den.org
Organization's web site	www.earthforce.org

Organization	Friends of Nevada Wilderness
Name/Title	Shaaron Netherton, ED
Contact Information: Phone and email	shaaron@nevadawilderness.org, 775 324-7667, 775 750-6119 (cell) Wes Hoskins , Forest Project Coordinator, Director of all FS Work + Volunteers Brian Beffort, Associate Director
Organization's web site	http://www.nevadawilderness.org
Organization	Friends of the Forest, Inc. Sedona
Name/Title	Heather Provencio, Helen Campbell
Contact Information: Phone and email	hcprovencio@fs.fed.us, 928 203-7501 hhcampbell@earthlink.net
Organization's web site	http://www.friendsoftheforestsedona.org
Organization	Golden Gate Conservancy
Name/Title	Denise Shea, Director of Volunteer Services- Conservancy, 415 561-3013
Contact Information: Phone and email	dshea@parksconservancy.org
Organization's web site	www.parksconservancy.org
Organization	Girl Scouts of the USA
Name/Title	Susan Swanson, VP Membership and Volunteers, Rachel O'Leary, Volunteer Mobilization
Contact Information: Phone and email	SSwanson@girlscouts.org; ROleary@girlscouts.org 1-212-852-8000 ext. 6541
Organization	Los Angeles County Museum of Natural History
Name/Title	Julie McAdam-Manager Education Staff
Contact Information: Phone and email	213-763-3525 jmcadam@nhm.org
Organization's web site	http://www.nhm.org
Organization	Oregon Zoo
Name/Title	Paula McCall, Volunteer Manager, paula.mccall@oregonzoo.org
Contact Information: Phone and email	503 226-1561 x Direct Dial 503 220-5711
Organization's web site	http://www.oregonzoo.org/Volunteer/index.htm
Organization	Region 5 Trees & Trails
Name/Title	Marlene Finley
Contact Information: Phone and email	mfilney01@fs.fed.us ; 707 562-8856, 707 246-9644 (cell)
Organization's web site	http://www.fs.fed.us/r5/news/2008/trees-trails.shtml

Organization	San Bernardino National Forest Association
Name/Title	Sarah Miggins, ED
Contact Information: Phone and email	smiggins@fs.fed.us, 909 382-2796 (office), 909 496-6953 (cell)
Organization's web site	http://www.sbnfa.org
Organization	Volunteers for Outdoor Colorado
Name/Title	Ann Baker Easley, ED
Contact Information: Phone and email	303-715-1010x121; ann@voc.org
Organization's web site	http://www.voc.org; www.volunteersoutdoors.org
Organization	Washington Trails Association – (In 1966 when it began it was 'Signposts'.)
Name/Title	Elizabeth Lunney (has been at WTA for 10 years)
Contact Information: Phone and email	206 965-8555, 206 390-1621 (cell) elizabeth@wta.org
Organization's web site	http://www.wta.org

Appendix 2 – Interview Questionnaire

Project Background and Scope: The Forest Service has a history of volunteer commitment supporting the agency's mission of "caring for the land and serving people". This engagement is focused on identifying alternative models for managing and leveraging Volunteers as the Agency considers an array of possibilities for organizing, managing and funding volunteer programs. The objective is not to identify "one model" but to assist the Agency in understanding various elements from the research that may be applicable to the Agency as it continues to shape and develop a Volunteer program for the next century.	
Project Objective: *To understand how Non Profits approach Volunteer Management in order to meet their organizational mission*	
Organization Information	
Date	
Organization	
Name/Title	
Contact Information: Phone and email	
Organization's web site	
Organizations Mission	
Strategic Objectives	
1. Describe – in general- the role that volunteers play in achieving your organizations mission?	
2. Does your organization's strategic plan include volunteers?	
3. Can you describe in what ways they are included in the strategic plan? (mission, goals, outcomes)	

Organizational Structure	
4. Describe your organizational structure and where volunteers are included?	
5. Specifically, which of the following areas do you have volunteers integrated into your organizational structure? ☐ Board of Directors ☐ Financial Management and Accounting ☐ Technology and Information Systems ☐ Legal Counsel ☐ Fundraising and Development ☐ Marketing and Communications ☐ Organizational Development and Training Administrative Support ☐ Volunteer Management ☐ Program Service and Delivery	
6. Are their parts of your organizational structure that you have purposively not integrated volunteers? If so why?	
7. How do you determine the appropriate roles which could be performed by volunteers?	
Fundraising/Financing	
8. Can you explain how you leverage volunteers in your fundraising and development?	
9. Do you expect/ask volunteers to make financial contributions?	
Technology	
10. What role does technology play in executing on your volunteer strategy?	
11. Specifically what areas are you using it?	
12. Who do you know who is doing a great job of this?	

Programs/Activities	
13. How do you match volunteer skills with your program and activity needs?	
14. How do you recruit and market to prospective volunteers?	
15. How do you interview, screen and select volunteers?	
16. How do you orient, train and support your volunteers in the delivery of their services to your organization?	
17. What are your volunteer supervision and management strategies?	
18. How do you recognize your volunteers?	
19. What methods do you use to create strong attachments between your volunteers and your organization?	
Innovation and Change	
20. As you look at the next five years or beyond, what, strategic issues are you concerned about regarding volunteers and how are you considering responding?	
21. What work is your organization doing with volunteers that you believe is innovative?	

FOR USFS PARTNERS ONLY	
22. How do you believe the USFS could adapt their volunteer management model to better leverage your organizations capabilities?	
23. Based upon your response to #21, explain how you believe your ideas could be implemented at the local, regional and national level?	
24. What role can your organization play in assisting the USFS in the implementation of a new volunteer management model?	
25. What are the USFS's largest obstacles to successful changes in its volunteer management model?	

THANK YOU VERY MUCH FOR YOUR TIME!

Appendix 3 – Volunteer Management Capacity in America's Charities and Congregations – A Briefing Report – The Urban Institute

Volunteer Management Capacity in America's Charities and Congregations

A BRIEFING REPORT

February 2004

The Urban Institute

Citation: Urban Institute. 2004. *Volunteer Management Capacity in America's Charities and Congregations: A Briefing Report*. Washington, D.C.

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Executive Summary

Major Findings from the Volunteer Management Capacity Study

Volunteers can boost the quality of services in charities and congregations while reducing costs. However, these organizations are not always fully equipped to make the most of their volunteers. In order to better understand the current state of volunteer management capacity, The UPS Foundation, the Corporation for National and Community Service, and the USA Freedom Corps organized the first national study of volunteer management capacity. Conducted by the Urban Institute, the study draws on representative samples of charities and congregations. The study highlights the potential for charities and congregations to use more volunteers, some challenges in doing so, and capacity-building options to reduce the hurdles. Such efforts could go a long way toward meeting President Bush's Call to Service and his mandate that national and community service programs become engines of volunteer mobilization.

The Use of Volunteers. Many charities and congregational social service outreach programs use volunteers, and these volunteers play an important role in their operations. A large majority of organizations report that they are prepared to take on additional volunteers.

- *Four in Five Charities Use Volunteers*. Of the approximately 215,000 charities that filed Form 990 or 990EZ with the IRS in 2000 (required of those charities with over $25,000 in annual gross receipts), an estimated 174,000 organizations use volunteers. One in three congregations manage volunteers in social service outreach programs. Of an estimated 380,000 congregations in the United States, 129,000 manage volunteers in such programs.

- *Volunteers Offer Benefits Associated with Investments in Management*. A large majority of charities report their volunteers are beneficial to their operations in a number of ways. Further, the study concludes that investments in volunteer management and benefits derived from volunteers feed on each other, with investments bringing benefits and benefits justifying greater investments.

- *Charities and Congregations Are Ready to Take on More Volunteers*. More than nine in ten organizations are ready to take on more volunteers at their present capacity, with a median of 20 new volunteers. Without any capacity enhancements, charities could take on an estimated 3.4 million new volunteers and congregational social service outreach activities could take on an estimated 2.5 million new volunteers.

Challenges to Mobilization of Volunteers. The greatest challenges that charities and congregations face is an inability to dedicate staff resources to and adopt best practices in volunteer management.

- *Devoting Substantial Staff Time Spent on Volunteer Management is a Best Practice*. The percentage of time a paid staff volunteer coordinator devotes to volunteer management is positively related to the capacity of organizations to take on additional volunteers. The best prepared and most effective volunteer programs are those with paid staff members who dedicate a substantial portion of their time to management of volunteers. This study demonstrated that, as staff time spent on volunteer management increased,

adoption of volunteer management practices increased as well. Moreover, investments in volunteer management and benefits derived from volunteers feed on each other, with investments bringing benefits and these benefits justify greater investments

- *However, Staff Time Spent in Volunteer Management is Low*. Three out of five charities and only one out of three congregations with social service outreach activities reported having a paid staff person who worked on volunteer coordination. However, among these paid volunteer coordinators, one in three have not received any training in volunteer management, and half spend less than 30 percent of their time on volunteer coordination.

- *Most Volunteer Management Practices Have Not Been Adopted to a Large Degree*. Less than half of charities and congregations that manage volunteers have adopted most volunteer management practices advocated by the field. For example, only about one-third of charities say they have adopted to a large degree the practice of formally recognizing the efforts of their volunteers.

- *Capacity-Building Options for the Future*. Despite the willingness of charities and congregations to take on volunteers, challenges prevent them from meeting their full potential. A number of actions might improve the ability of charities to work effectively with and take on new volunteers.

- *Increasing Volunteerism During the Workday*. The most prominent challenge to implementing volunteer programs among charities and congregations is recruiting volunteers during the workday, reported as a big problem by 25 percent of charities and 34 percent of congregational social service outreach programs. This suggests that groups interested in promoting volunteerism should explore ways to create more flexible workdays for potential volunteers who have regular jobs.

- *External Support of Full-Time Volunteer Managers*. The most popular capacity-building option among both charities and congregations with social service outreach activities is the addition of a one-year, full-time volunteer with a living stipend (like an AmeriCorps member), with responsibility for volunteer recruitment and management. AmeriCorps members 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.

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

- *Developing Avenues to Help Train Staff*. Training staff on how to work with volunteers could address a range of challenges, including recruiting volunteers during the workday.

Introduction

In his 2002 State of the Union address, President Bush issued a call to service, urging all Americans to spend 4,000 hours serving others over the course of their lives. To help develop and strengthen volunteer opportunities, the president created the USA Freedom Corps. The mission of the USA Freedom Corps is to foster a culture of service, citizenship, and responsibility in the United States. As a component of the USA Freedom Corps, the Corporation for National and Community Service directs programs that provide service opportunities and facilitate volunteerism. At the heart of these efforts is the belief that our nation's interests are best served when its citizens are engaged in providing service to their communities.

Because a 1998 UPS study indicated that volunteers do not always feel their volunteer experiences make best use of their skills and interests, the Corporation for National and Community Service, the UPS Foundation, and the USA Freedom Corps organized the first national study of volunteer management capacity to better understand the scope of issues confronting our charities and congregational social service outreach activities. The study, conducted by the Urban Institute in fall 2003, is based on a representative sample of 1,753 charities, drawn from the more than 200,000 charities that filed their annual paperwork with the IRS in 2000. It also includes information from 541 congregations, representing the 380,000 congregations (of all faiths) identified by American Church Lists. Because the organizations interviewed reflect the characteristics of these populations of charities and congregations, the results can be used to describe current overall conditions in these organizations.

As a companion to this study, the USA Freedom Corps and the Corporation for National and Community Service partnered with the Bureau of Labor Statistics in 2002 and again in 2003 to add questions about volunteering to the Current Population Survey (CPS) for the month of September. The CPS results provide context for some of the findings in the volunteer management capacity study. The 2003 CPS survey indicates that an estimated 63.8 million Americans (28.8 percent of the United States population) volunteered through an organization in the 12 months preceding the interview, up 4 million (6.8 percent) from the 59.8 million Americans who volunteered in 2002. Because of that growth and the continuing focus on increasing volunteering and civic participation among Americans, volunteer management capacity issues acquire greater significance.

We expect these studies to stimulate activity regarding the capacity of charities and congregations to work with volunteers, including strengthening volunteer management practices and raising awareness among private and public funding organizations regarding unmet needs. Through such efforts, we can help Americans, charities, and congregations answer President Bush's Call to Service and his mandate that national and community service programs optimize program design and serve as engines of volunteer mobilization.

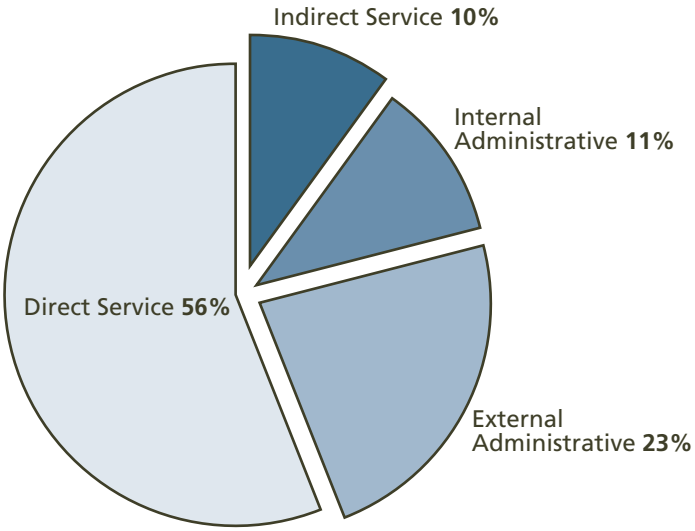
Volunteering in Charities and Congregations

Key Finding: Most Charities and Many Congregations Involve Volunteers in Their Operations.

Four in Five Charities Use Volunteers. Before undertaking this study, we did not know the proportion of public charities in the United States that involve volunteers in their operations. In 2000, approximately 215,000 charities filed Form 990 or 990EZ with the IRS, the form required of those charities with more than $25,000 in annual gross receipts. We learned that 81 percent of these charities—or an estimated 174,000 organizations—use volunteers in one way or another. Many of these charities are run completely by volunteers. Our estimates do not include the roughly 400,000 small registered charities that do not file annual paperwork with the IRS, virtually all of which are run by volunteers.

Figure 1. Volunteers perform a variety of tasks in charities. We asked what tasks most of their volunteers perform, and then we coded tasks into four categories:

- direct service, such as mentoring and tutoring;
- external administrative, such as fundraising;
- internal administrative, such as filing and copying; and
- indirect service, such as planting trees.



Congregations Manage Volunteers in Social Outreach. We learned that an estimated 83 percent of the nation's 380,000 congregations have some kind of social service, community development, or neighborhood organizing project. Although most congregations have social service outreach programs, most are involved as partners or sponsors and therefore do not manage volunteers themselves. However, one in three congregations—an estimated 129,000 such organizations—have responsibility for managing volunteers in social service outreach activities. These congregations are the subject of our study.

Size of Congregations Matters. Larger congregations are more likely than smaller ones to have social service outreach activities, and they also are more likely to manage volunteers in them. Two-thirds of congregations with more than 500 active participants have responsibility for managing volunteers in social service outreach.

Charities Exhibit Range in "Scope of Volunteer Use." Based on the numbers of volunteers and the numbers of hours these volunteers spend with an organization in a typical week, we divided charities into four categories of "scope of volunteer use." Four in ten are categorized as "few volunteers, few hours"; three in ten have "many volunteers, many hours"; two in ten have "many volunteers, few hours"; and the remaining one in ten have "few volunteers, many hours." Many volunteers is defined as at least 50 over the course of a year, and many hours is defined as at least 50 hours contributed collectively by volunteers in a typical week.

Investments in Paid Staff for Managing Volunteers

Key Finding: Most Charities and Congregations Are Unable to Invest Substantial Staff Resources in Volunteer Management.

Charities Are More Likely to Have a Paid Staff Volunteer Coordinator. We asked respondents if their charity or congregational social service outreach activity has a paid staff person whose responsibility includes management of volunteers. Three out of five charities (62 percent) report that they have such a person. Roughly a third (37 percent) of congregations that manage volunteers in social service outreach activities say that a staff person has responsibility for this management.

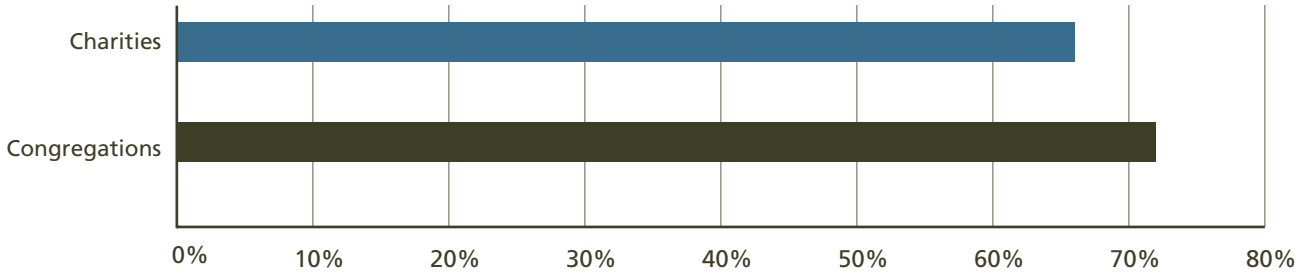
Paid Staff Coordinators Spend Little Time Managing Volunteers. The presence of a paid staff coordinator does not mean the staffer spends much time on volunteer administration, or that he or she is trained in the field. We asked organizations with paid staff coordinators how much work time this coordinator devotes to volunteer management. We learned that the median paid staff volunteer coordinator in charities spends 30 percent of his or her time on this task. The median is the same among paid coordinators of congregational social service outreach activities.

Full-Time Volunteer Managers Are Rare. Of charities with a paid staff volunteer manager, only one in eight have someone who devotes 100 percent of his or her time to volunteer management. Only one congregation in our study said it has a full-time volunteer coordinator for its social service outreach activities!

Most Volunteer Managers Have at Least a Minimum Level of Training. If organizations reported that they have a paid staff member who dedicates time to managing volunteers, we asked if this person has any formal training in volunteer administration, such as coursework, workshops, or attendance at conferences that focus on volunteer management. We learned that paid staff volunteer coordinators in 66 percent of charities and 72 percent of congregational social service outreach activities pass this minimum threshold for training in volunteer administration.

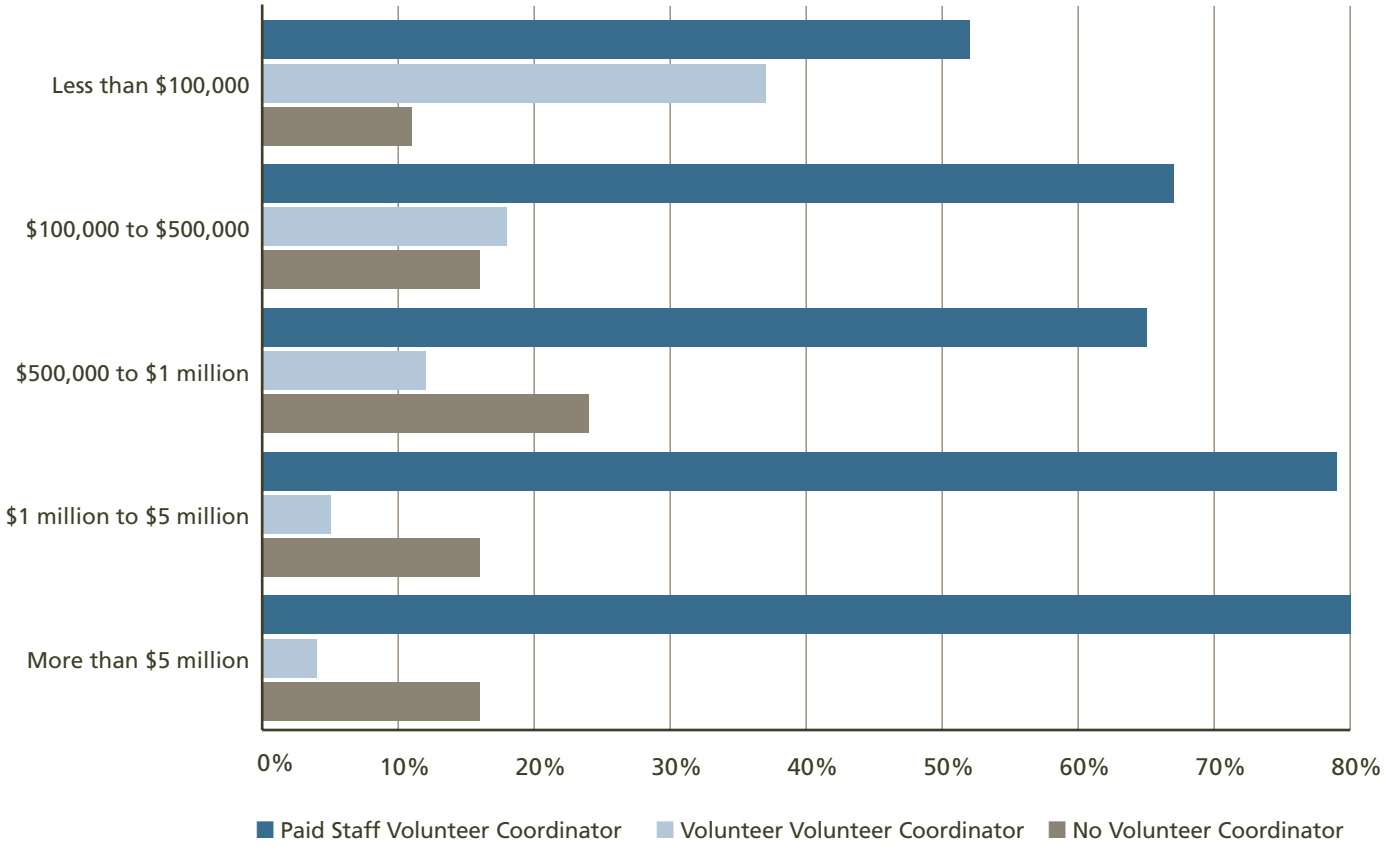
Larger Charities Are More Likely to Assign Paid Staff to Volunteer Administration. As indicated in figure 3, the likelihood that a charity has a paid staff volunteer coordinator increases with the size of the organization. However, the use of volunteers by smallest charities (under $100,000 annual expenditures) to coordinate other volunteers makes them the least likely to be without any kind of volunteer coordinator. In addition to larger charities, paid staff coordinators are more likely to be found in charities that involve volunteers primarily in direct service and internal administration.

Figure 2. Percentage of paid staff coordinators with any level of training in volunteer administration



We divided charities into size groups depending on how much total money they say they spent in a year. This figure is taken from Forms 990 reported to the IRS in 2000 by charities in the study.

Figure 3. Type of volunteer coordinator by size of charity



We divided charities into size groups depending on how much total money they say they spent in a year. This figure is taken from Forms 990 reported to the IRS in 2000 by charities in the study.

Use of Staff to Manage Volunteers Lags Behind Use of Staff for Fundraising. A comparison with other national research on public charities[1] indicates that the professionalization of volunteer management lags behind the professionalization of fundraising. A little more than half (55 percent) of charities across the United States report that they employ a staff member or consultant whose primary responsibility is fund development or fundraising. In the current research, we learned that 39 percent of charities have a paid staff person who spends at least half of his or her time managing volunteers.

Organizations Build Volunteer Programs on Minimal Resources. Taken together, the findings regarding paid staff support for management of volunteers point to low professionalization and capitalization of volunteer administration in the United States. The fact that many coordinators are getting some training suggests that many are interested in learning about how to manage volunteers. However, the small amount of time spent on volunteer administration suggests that charities and congregations do not have the resources to allocate to volunteer management or that they devote their organizational resources primarily to other efforts.

[1]Mark Hager, Patrick Rooney, and Tom Pollak, "How Fundraising is Carried Out in U.S. Nonprofit Organisations," *International Journal of Nonprofit and Voluntary Sector Marketing*, 2002.

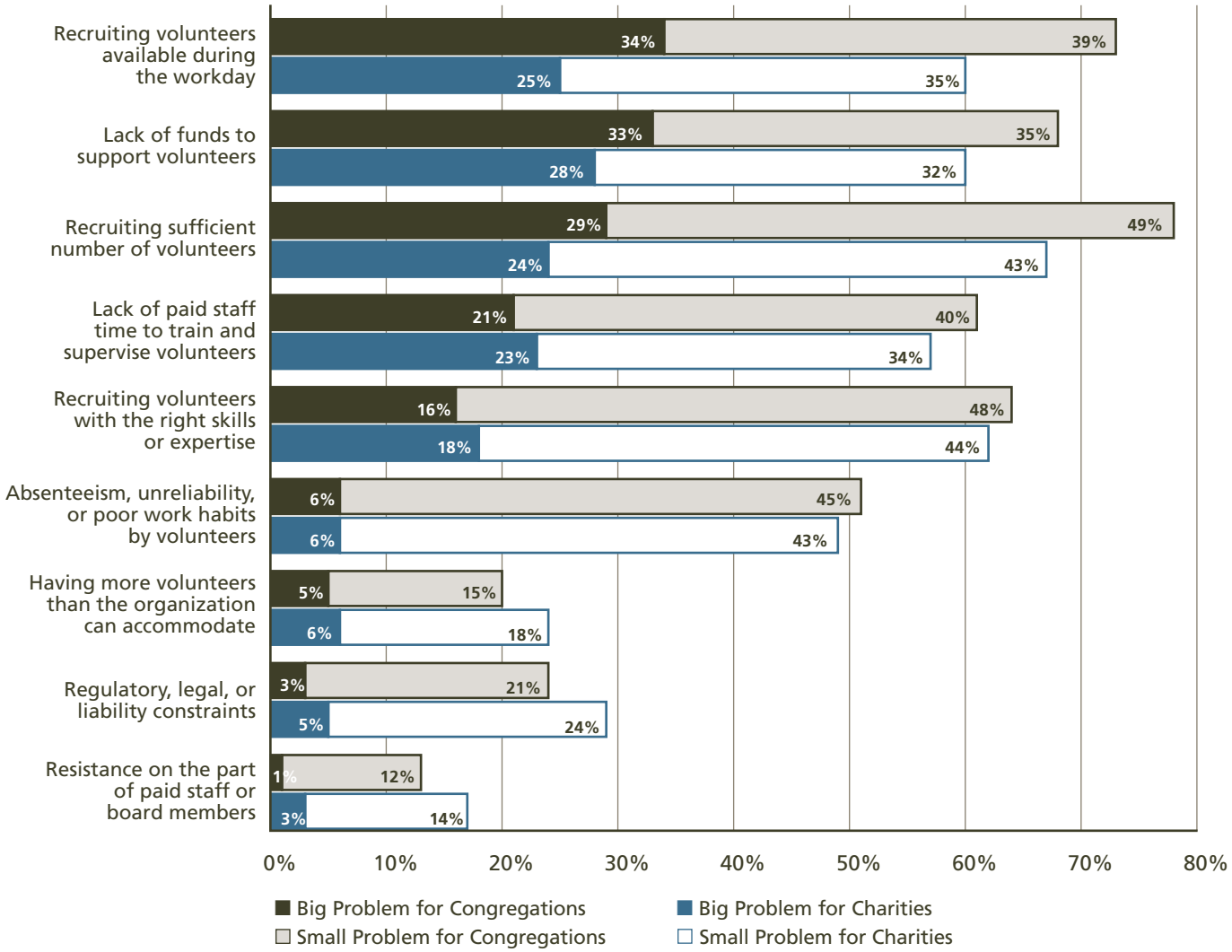
Challenges in Volunteer Management

Key Finding: Although Challenges to Volunteer Management Are Common, They Are Not Reported by an Overwhelming Number of Charities or Congregations.

An Array of Potential Challenges. We asked both charities and congregations whether nine common challenges were a big problem, a small problem, or not a problem for their recruitment and management of volunteers. Figure 4 shows the percentage of each group that claimed a particular challenge as a problem.

Difficulty Recruiting Volunteers for Workday Assignments. The most common "big" challenges are related to volunteer recruitment. The most common recruiting problem across charities and congregations is recruiting volunteers who are available during the workday. Because many volunteers have jobs and can volun-

Figure 4. Percentage of charities and congregational social service outreach activities that cite various challenges as a big problem in their volunteer programs



teer only during their off hours, charities and congregations often find themselves short of help at times when they need it the most. However, despite the comparatively larger number of respondents who noted this challenge, only one-quarter of charities and one-third of congregations claim this issue as a big problem.

Small Charities and Congregations Report More Recruiting Challenges. To the extent that recruiting is a challenge, it is more of a challenge for smaller charities and congregations. Larger organizations, which generally have greater investments in volunteer management, are less likely to say that recruiting sufficient numbers of volunteers or recruiting volunteers during the workday is a big problem.

Some Challenges Not So Challenging. Poor work habits of volunteers, regulatory constraints on volunteer involvement, and indifference of board or staff toward volunteers are not commonly seen as problems or are seen only as small problems by both charities and congregational social service outreach activities.

Time Spent by Paid Staff in Volunteer Administration Helps Address Recruiting Problems. Recruiting volunteers with the right kinds of skills is a big problem for 18 percent and a small problem for 44 percent of charities. However, the greater the percentage of time a paid staff person spends on volunteer administration, the less likely a charity is to report problems with recruiting.

Charities with Recruiting Challenges More Likely to Try a Range of Recruiting Methods. We asked charities if they recruit volunteers by speaking before groups, by Internet, by printed materials, by special events, or by several other popular methods. We learned that organizations that say they have challenges in recruiting volunteers are the same ones that use these methods. Charities that have fewer challenges (or needs) in recruiting volunteers have less reason to try a range of recruiting strategies.

Challenges Index

To compare the overall degree of management challenges with other organizational characteristics, we created a *Challenges Index* from eight of the nine challenges in figure 4. We excluded the challenge of "too many volunteers" because we believe it to be different from the other kinds of challenges considered.

Each of the eight challenges contributes a value of 0 to the Index if a charity or congregation feels it is not a problem. A challenge contributes a value of 1 if an organization feels it is a small problem, and a value of 2 if an organization feels it is a big problem. So, for example, if a respondent feels none of the challenges is a problem for his or her organization, the Index value for this organization would be 0 (0+0+0+0+0+0+0+0). This was the case for 9 percent of charities and 5 percent of congregations. However, if a respondent answered that all eight challenges were a big problem for his or her organization, the Index value for that organization would take on the maximum value of 16 (2+2+2+2+2+2+2+2). This was the case for less than 1 percent of charities and congregations.

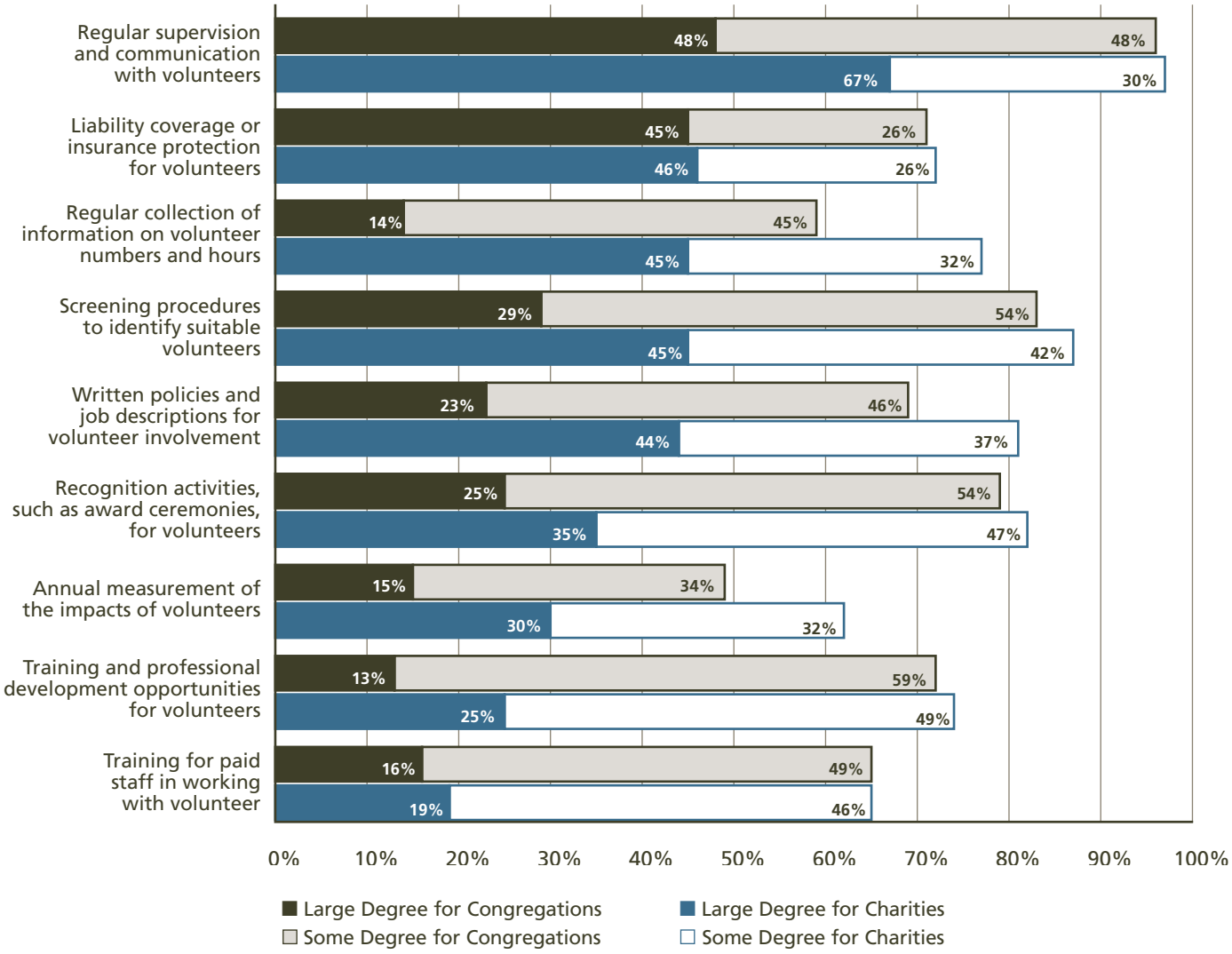
The median *Challenges Index* value for both charities and congregations is 5. This means half of charities and congregations scored 5 or less on the Index, and the other half scored 5 or more. This relatively low value reinforces our observations that charities and congregations generally report low levels of challenges in their recruitment and management of volunteers.

Volunteer Management Practices

Key Finding: Charities and Congregations Are Receptive to Best Practices in Volunteer Management, but Such Practices Have Not Taken Hold to a Large Extent.

Few Volunteer Management Practices Adopted to a Large Degree. We presented survey respondents with nine volunteer management practices that the literature identifies as best practices. We asked whether they have adopted these practices to a large degree, to some degree, or not at all. Figure 5 shows the percentage of charities and congregations that say they have adopted a particular practice to a large degree. Except for the common practice among charities of regularly supervising and communicating with their volunteers, none of these tasks are practiced to a large degree by a majority of charities or congregations.

Figure 5. Management tasks that organizations say they practice to a large degree



Many Practices Adopted to Some Degree. When we consider those charities and congregations that say they have adopted these practices to some degree, however, we get a different picture. Except for the uncommon practice of outcome measurement among congregations, all nine items are practiced by a majority of charities and congregations at least to some degree. For example, although only 25 percent of charities say they offer training and professional development opportunities for volunteers to a large degree, another 49 percent say that they offer these opportunities to some degree. This leaves only 26 percent of charities that say that they offer no such opportunities.

Larger Charities Invest More in Volunteer Management. Adoption of best practices is more common in larger charities, which are those with greater organizational capacity to adopt this broad array of practices. Moreover, adoption of best practices is most common in those charities that have a paid staff person with responsibility for managing volunteers. This points to consistent investment by some charities in both staff and structure for better management of volunteers.

Lower Adoption among Congregations. The adoption of volunteer management practices has made fewer inroads among congregations that manage volunteers in social service outreach activities. Just as congregations display lower levels of commitment of staff resources for volunteer management when compared with charities, congregations have adopted recommended volunteer management practices to a much lesser degree than have charities. Furthermore, fewer congregations indicate that they have adopted many of the practices to a large degree.

Large Congregations Better Prepared Than Smaller Congregations. However, as with charities, we find that larger congregations are better prepared to manage volunteers than are their smaller counterparts. The largest congregations are the ones with the greatest scope of volunteer use, greatest likelihood to have a paid staff coordinator, and greater overall adoption of recommended management practices.

Staff Time Spent Managing Volunteers Related to Adoption of Management Practices. Because staff time allocated to volunteer management and adoption of management practices are both indications of investment in volunteers, we expect the two to be associated. They are. As staff time spent on volunteer management increases, adoption of volunteer management practices increases as well. We also found positive and significant relationships between the percentage of staff time devoted to volunteer management and each of the individual volunteer management practices.

Management Index

Just as we constructed an Index measure of overall level of challenges faced by charities and congregations, we constructed a *Management Index* to measure the overall scope of volunteer management. We constructed the Index in a way similar to how we created the Challenges Index. For each of the nine items in figure 5, no adoption contributes a value of 0, some degree of adoption contributes a value of 1, and a large degree of adoption contributes a value of 2. So, the Index ranges from a value of 0 to 18. The median charity has a value of 10, while the median congregation has a value of 8.

Benefits Volunteers Bring to Charities

Key Finding: Most Charities Claim Volunteers Greatly Increase The Quality and Level of Service and Public Support for the Organization while Reducing Costs.

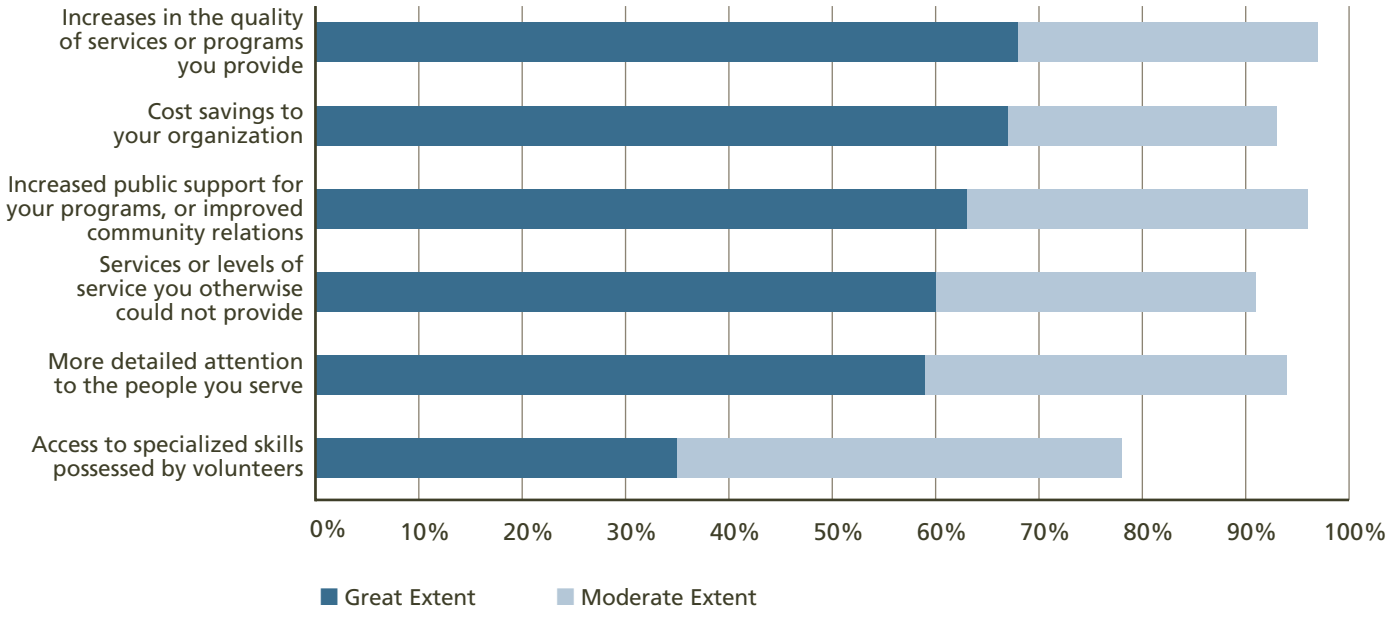
Benefits of Volunteers Cited by Nine in Ten Charities. We asked charities about the extent to which volunteers provide certain kinds of benefits to their organization and whether benefits are provided to a great or moderate extent. The results are presented in figure 6 below. We learned that charities are generally enthusiastic about the benefits volunteers provide. A majority of charities cited five of the six items as beneficial to a great extent. When including those charities that claimed benefits at only a moderate level, more than 90 percent of respondents cited these five items. Fewer charities benefit from specialized skills, such as pro bono legal, financial, management, or computer expertise.

A Measure of Volunteer Benefit. Charities with different characteristics are more likely to cite greater benefits from their volunteers. For example, smaller charities are more likely to claim higher levels of benefits from their volunteers. To compare the level of benefits that volunteers bring to charities with other organizational characteristics presented in this brief, we computed a Benefits Index that we report in the following pages.

Benefits Index

We constructed a *Benefits Index* in the same way that we built indexes described previously. For each of the six items above, a response of 'not at all' adds 0 to the Index. A response of 'moderate extent' contributes a value of 1, and a response of 'great extent' contributes a value of 2. The Benefits Index ranges from a minimum value of 0 to a maximum value of 12, with a median value of 9.

Figure 6. Percentage of charities that feel volunteers are beneficial to their operations



Investments in Volunteer Management

Key Finding: Investment in Volunteer Management and Greater Benefits from Volunteers Form a Positive Feedback Loop.

Charities Invest in Volunteers in a Variety of Ways. Thus far, we have discussed investments in paid staff and in volunteer management practices. Hiring someone who has training in volunteer management also demonstrates a greater investment in volunteer management. To derive an overall assessment of investment in volunteer management, we combined these three items into a single measure, describe below.

Investments and Benefits Vary Together. We expect that the charities that invest in volunteers will be those that say they derive greatest benefits from volunteers. A comparison of the investments measure and the benefits index bears out this expectation. A Pearson's correlation coefficient of 0.37 indicates a moderate positive relationship between investment in volunteer management and the perceived benefits of volunteers. We conclude that the belief that volunteers are beneficial leads charities to invest in their management of volunteers, and that investing in the management of volunteers leads them to value the benefits of their volunteers more.

Figure 7.

A Measure of Investment in Volunteer Management.

We described a Management Index based on the range of volunteer management practices that charities had put into place in their organizations. Our measure of *Investment* in volunteer management adds to the Management Index a measure of the amount of work time a paid staff person spends on volunteer management, and whether this person has formal training in volunteer administration. Specifically:

INVESTMENT = (Proportion of time spent by paid staffer on volunteer management x 4)
+ (1 if staffer has formal training in volunteer administration)
+ (Management Index).

If a charity has a paid staff person who spends 100 percent of his or her time on volunteer coordination, the charity receives a value of 4 on the first part of the equation. If the staffer has training such as coursework, workshops, or attendance at conferences that focus on volunteer management, the sum grows to 5. If this same charity has adopted all nine volunteer management practices to a large degree, it would score the maximum value of 23 (4+1+18). The median charity scored 11 on this measure.

Charities with Ties to Religious Organizations

Key Finding: Charities that Collaborate or Partner with Religious Organizations Report Greater Benefits from Volunteers Than Charities that Do Not Have Such a Collaboration.

Three in Ten Charities Tied to a Religious Organization. The 2002 and 2003 Current Population Surveys indicate that people commonly volunteer in religious organizations. We asked charities if they were currently collaborating or partnering with a religious organization. About 29 percent said that they were.

Charities That Partner with Religious Organizations Have Greater Scope of Volunteer Use. We wanted to know if the charities with ties to religious organizations differed in important ways from the 71 percent that did not report this kind of tie. We found that those organizations that partner with religious organizations are more likely to use a large number of volunteers contributing many hours of service than are those organizations without this type of collaboration.

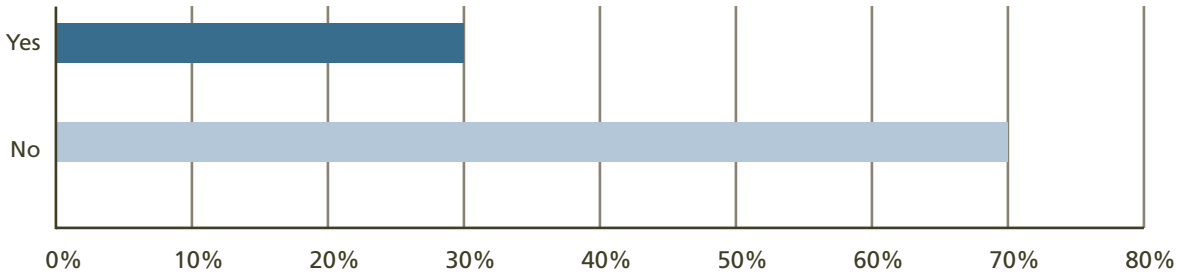
Religious Ties and the Benefits of Volunteers. To see if charities with religious ties value their volunteers more, we tested the difference in average (mean) values for the Benefits Index. That is, we wanted to know if the higher average benefits from volunteers reported by charities with ties to religious organizations was statistically significant. We found that it is. Charities with ties to religious organizations claim greater levels of benefit from their volunteers than do charities without these ties.

Religious Ties and Investment in Volunteer Management. Next, we considered whether the two groups of charities differ in terms of the investments they have made in the development of their volunteer management programs. Based on average values on the Investments Measure we learned that charities with ties to religious organizations have invested more in volunteer management than charities that do not collaborate with religious organizations.

Volunteer Management Challenges Greater among Those with Religious Ties. Adoption of volunteer management practices does not necessarily mean that organizations report fewer challenges in recruiting and managing volunteers. Indeed, although charities with ties to religious organizations have greater investment in volunteer management, they also report more challenges. However, we expect that their adoption of a greater number and variety of management practices gives them greater potential for overcoming these challenges.

Note: This page focuses on charities that collaborate with religious organizations, which are often congregations. However, these religious organizations are not the congregational social service outreach activities that we report elsewhere throughout this document.

Figure 8. Percentage of charities that collaborate or partner with a religious organization



Capacity to Take On More Volunteers

Key Finding: Most Charities and Congregational Social Service Outreach Activities Are Ready to Take On a Substantial Number of New Volunteers, Even Without Additional Support.

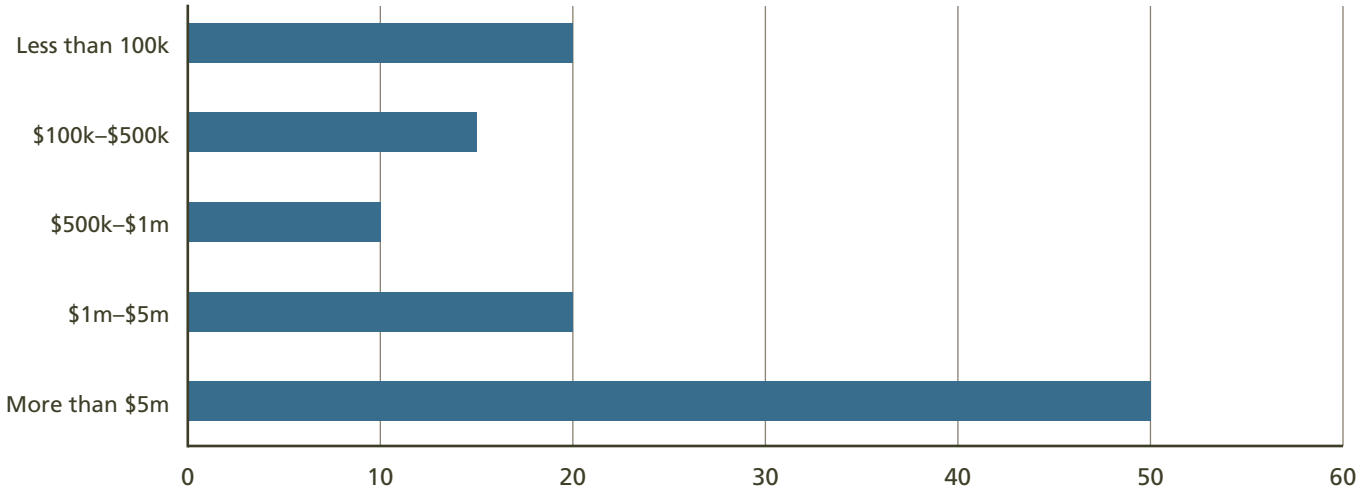
Charities and Congregations Are Ready and Willing. We asked respondents how many additional volunteers their organization could absorb and utilize effectively, given their present capacity to manage or work with volunteers and given unlimited availability of volunteers. Fully 91 percent of charities and 96 percent of congregational social service outreach programs said they could currently take on at least some additional volunteers at present capacity.

Demand for Volunteers among Charities Is High. The typical (median) charity that uses volunteers reports that it could currently take on an additional 20 volunteers. If this estimate is accurate, it indicates that the number of volunteers has not begun to approach the demands and capacities of charities and congregations. With 174,000 charities (with more than $25,000 in annual receipts) each demanding 20 volunteers, overall unfilled demand exceeds 3.4 million volunteers. This does not include the demands of the more than 400,000 small charities that are run primarily by volunteers.

Largest Charities Boast Greatest Readiness. Figure 9 indicates that the size of the charity does not always dictate how many volunteers it feels it is ready to absorb. The median demand among the smallest charities is 20 volunteers, and the median is lower for charities with annual expenditures between $100,000 and $500,000 and between $500,000 and $1 million. However, the median charity with expenditures greater than $5 million is ready and willing to take on 50 additional volunteers.

Capacity to Take On Volunteers Tied to Scope of Volunteer Use. Not surprisingly, the reported capacity of charities and congregations to take on more volunteers is greatest for charities that report a large scope of volunteer use. Charities with low-scope volunteer use are the most likely to respond that they can take on few volunteers.

Figure 9. Median number of volunteers charities say they could take on, by size



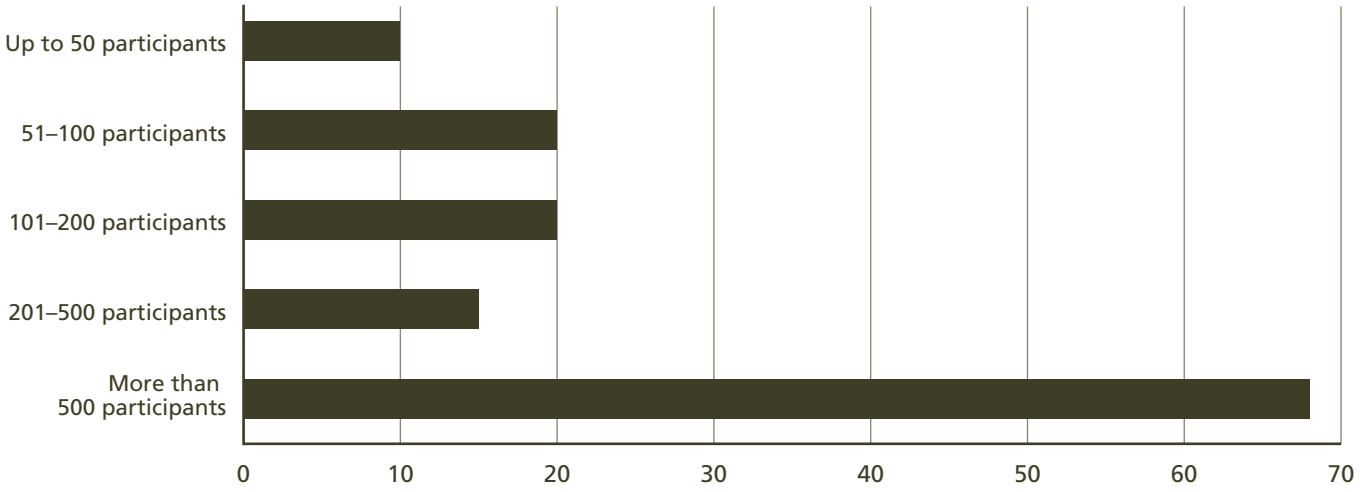
Size categories for charities are based on total expenditures in a year.

Congregations Also Indicate High Level of Readiness and Demand. The median congregational social service outreach program also says it could take on 20 additional volunteers. With an estimated 129,000 congregations managing volunteers in social service outreach activities, 20 volunteers apiece results in an estimated demand for 2.5 million volunteers. This demand is for congregational social service outreach activities alone, and does not include other volunteer opportunities in congregations, such as teaching religious classes to the membership and ushering during services.

Largest Congregations Also Best Prepared. As with charities, the relationship between size and the capacity to absorb new volunteers is not clear until one considers the demands of the largest congregations. Large congregations, which are the ones that have made the greatest investments in volunteer management and currently manage the largest number of volunteers, are ready to take on the most volunteers. The median congregation with more than 500 active participants says it is ready to absorb a median of 68 additional volunteers into its social service outreach activities.

Capacity to Take on Volunteers Related to Level of Staff Supports. We expect that the organizations that have many volunteer management practices in place (and therefore score highly on the Management Index) will be the ones that say they can absorb a lot of volunteers. However, we find a moderately low level of association between the Management Index and the raw number of volunteers that charities and congregations say they are ready for. On the other hand, we observe that the percentage of time a paid staff volunteer coordinator devotes to volunteer management is related to the demand and capacity to take on more volunteers. The more time a paid staffer devotes to volunteer management, the greater the number of volunteers the charity says it can accommodate at present capacity.

Figure 10. Median number of volunteers congregational social service outreach activities say they could take on, by size



Size categories for congregations are based on the number of people who reportedly participate in the religious life of the congregations, including adults and children, and including people who are not formal members of the congregation.

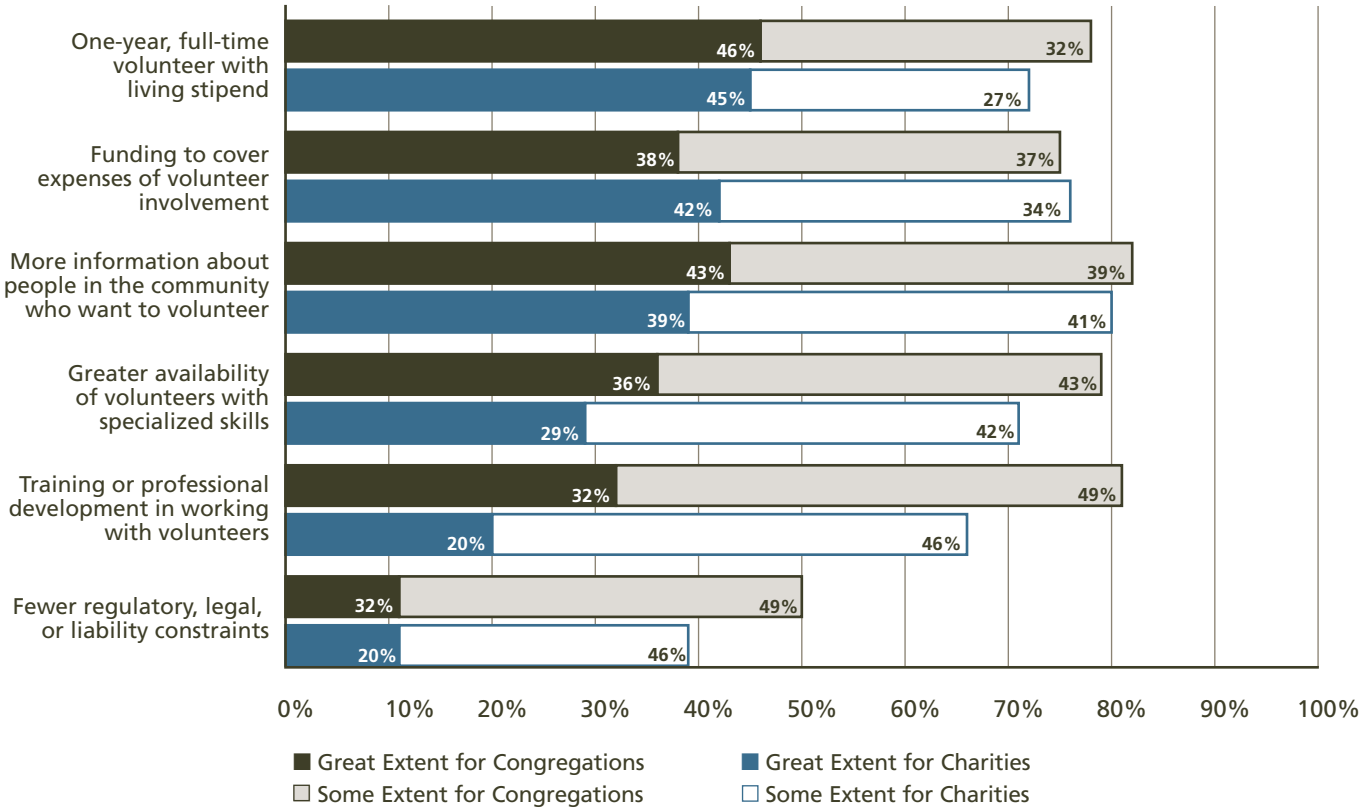
Capacity-Building Options

Key Finding: Charities and Congregations Are Supportive of a Range of Options for Increasing Their Capacity to Recruit and Manage Volunteers. Particularly Popular Is a Full-Time Stipended Volunteer Who Assists with Volunteer Management.

Widespread Support for Range of Proposals. Despite the apparent readiness of charities and congregations to take on new volunteers, they are nonetheless supportive of a range of capacity-building options for increasing the capacity of organizations to recruit and more effectively manage volunteers. Charities and congregational social service outreach programs have very similar responses to these proposals. An exception is that congregational social service outreach activities are substantially more likely to say that training for staff in how to work with volunteers would be a great boost to their volunteer management.

Stipended Volunteers Could Provide Important Support. We expected that charities and congregations would report that money would be the most welcome support for their volunteer programs. However, we found this not to be the case. The most popular option, supported as potentially helpful to a large degree by 45 percent of charities and 46 percent of congregational social service outreach programs, was the addition of a one-year, full-time volunteer with a living stipend who has responsibility for volunteer recruitment and management. Although we did not mention AmeriCorps members in our interviews, this program fits the description. Volunteers of this type would be attractive to both charities and congregations and could bolster many of their efforts to better recruit and manage volunteers.

Figure 11. Factors that organizations say would be helpful in supporting their volunteer programs



Many Organizations Simply Need Connections to Potential Volunteers. Two in five charities and congregational social service outreach programs say that information about people in the community who want to volunteer would be helpful to a great extent. This capacity-building option points to the value of community volunteer centers and other umbrella resources, and potential efforts to increase their ability to match volunteers with organizations that need them.

Are the challenges that organizations face in recruitment and management of volunteers related to the kinds of capacity-building and policy options they would support? We measured the association between the categories of these two variables, and we found statistically significant relationships between each challenge and support for each option. So, to assess which relationships were strong enough to warrant policy attention, we took special note of the ones where the measure of association (Gamma) was at least 0.35. The following table shows the results.

Charities that report problems in…	Are more likely to support…
Recruiting sufficient numbers of volunteers	• A full-time stipended volunteer with responsibility for volunteer management • More information about people who want to volunteer
Recruiting volunteers with the right skills or expertise	• A full-time stipended volunteer with responsibility for volunteer management • Greater availability of volunteers with specialized skills
Recruiting volunteers available during the workday	• Funding to cover expenses of volunteer involvement • Training or professional development for staff in working with volunteers • A full-time stipended volunteer with responsibility for volunteer management • More information about people who want to volunteer
Sufficient paid staff time to train and supervise volunteers	• Funding to cover expenses of volunteer involvement • Training or professional development for staff in working with volunteers • Greater availability of volunteers with specialized skills • A full-time stipended volunteer with responsibility for volunteer management
Sufficient funding to support volunteers	• Funding to cover expenses of volunteer involvement • Training or professional development for staff in working with volunteers • Greater availability of volunteers with specialized skills • A full-time stipended volunteer with responsibility for volunteer management • More information about people who want to volunteer
Absenteeism, unreliability, or poor work habits of volunteers	• Training or professional development for staff in working with volunteers

Conclusions and Implications

Volunteers Provide Substantial Benefits to Charities and Congregations. In 2003, approximately 63.8 million Americans volunteered in or through an organization, while thousands of charities and congregational social service programs engaged and managed these volunteers. Charities and congregations report that these volunteers are important to their operations, and that volunteers do a good job in providing services. At least six in ten charities indicate that their volunteers provide substantial cost savings and greatly increase the quality of services or programs provided, public support for their programs, and the level of services they can provide. Only six percent of charities and congregational social service outreach programs report that absenteeism, unreliability, or poor work habits are a big problem among their volunteers.

Volunteers Are a Valuable Financial Resource. 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. Independent Sector, a national advocate for the nonprofit sector, computes annually an equivalent average hourly wage for a volunteer's time. The calculation is derived from the average hourly wage of nonagricultural workers plus 12 percent for fringe benefits. By this calculation, the typical 2002 volunteer value was $16.54 per hour. To estimate the value charities themselves place on volunteers, the volunteer management capacity study asked charities to place a dollar value on an hour of their typical volunteer's time. The median charity estimated that an hour of its typical volunteer's time is worth $20. The two in five charities that report that their volunteers work a total of 50 or more hours in a typical week receive a benefit of at least $1,000 a week or $52,000 a year from their volunteers. Volunteers are a true financial resource for most charities.

Investment in Volunteer Managers Is Important in Effective Recruitment and Mobilization of Volunteers. The volunteer management capacity study provides a portrait of a functioning sector of community organizations that offer community services or goods with limited resources. Few are able to hire a full-time volunteer coordinator, so most rely either on staff members who spend part of their time on volunteer management or on volunteers themselves to manage other volunteers. One in three paid staff volunteer managers have not received any training, including having attended a workshop on volunteer management. The median paid volunteer coordinator in a charity or congregation spends only 30 percent of his or her time managing volunteers. However, the study indicates that those with paid staff members who dedicate a substantial portion of their time to management of volunteers experience fewer recruitment challenges and demonstrate greater adoption of volunteer management practices. Funders and organizations that invest in staff volunteer coordinators and training will produce charities and congregations with a greater capacity to their use of volunteers. This report finds that investments in volunteer management and benefits derived from volunteers feed on each other, with investments bringing benefits and these benefits justifying greater investments. We conclude that the value that volunteers provide to organizations they serve should make the effective management of volunteers a key priority.

Volunteerism Could Benefit from a Workday That is More Volunteer-Friendly and Flexible. Although we note that charities and congregations are not overwhelmed by problems in recruiting and managing volunteers, they nonetheless report a variety of challenges in implementing their volunteer programs. The most prominent challenge, recruiting volunteers during the workday, was reported among 25 percent of charities and 34 percent of congregational social service outreach programs. According to estimates from the 2002 CPS, 1.3 million non-volunteering Americans would volunteer if their employers ran a volunteering program and 69.1 million non-volunteering Americans would be motivated to volunteer if they had more time.

Although we cannot say how many people in the latter group would consider volunteering if their place of work promoted time for volunteering, the data suggest that groups interested in promoting volunteerism should explore ways to create more flexible workdays for

potential volunteers with regular jobs. Although some research suggests that corporate volunteer programs enhance business goals (i.e., company image and staff morale), a 2001 survey of 65 Fortune 500 corporate volunteer programs indicates that less than one in five provide employees with paid leave for participating in company-sponsored volunteer activities.[2] If more corporations supported volunteerism during the workday, they would find a nonprofit sector eager to make use of their employees.

Partnerships with Religious Organizations Linked to Greater Benefits. According to the CPS, more Americans volunteer through religious organizations than through any other type of organization. The volunteer management capacity study reports that one in three charities partner with religious organizations, but these organizations report greater benefits from their volunteers than do charities without these partnerships. Because religious partners have the potential to provide access to a pool of volunteers, charities that partner with religious organizations also are more likely to report a large number of volunteers per year who collectively contribute more than 50 hours a week.

National Service Members Could Play Key Roles in Leveraging Volunteerism. Although many organizations have made efforts to implement volunteer management practices, many of these practices have not taken hold to a great degree. 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 supported the use of a full-time stipended volunteer who could assist with their volunteer program. Although AmeriCorps was not specifically mentioned in the interview, the program fits that description. After being trained in volunteer management practices, AmeriCorps members can be placed in organizations where they can help address a number of volunteer management challenges. We found that AmeriCorps-type volunteers could be particularly useful in charities that are challenged in recruiting enough and the right kinds of volunteers, as well as in those charities that do not have time or money to train and supervise volunteers.

Intermediaries Have an Important Role to Play in Bridging the Gap between Volunteers and Volunteer Opportunities. Although some charities and congregations have more volunteers than they can accommodate, we do not find this a widespread concern among these organizations. We find that over nine in ten organizations are ready to take on a median of 20 more volunteers at their present capacity. However, many organizations struggle with finding a sufficient number of volunteers. Roughly 40 percent report that more information about potential volunteers in the community would greatly help their volunteer program. On the other hand, estimates from the 2002 CPS survey indicate that 6.3 million non-volunteering Americans would volunteer if they had more information about volunteer opportunities. Taken together, these findings highlight the important role that volunteer centers and other community information resources could play in linking people who want to volunteer with organizations that need them.

Training Staff on How to Work with Volunteers Could Address Range of Challenges. Charities that said that they have challenges recruiting individuals to volunteer during the workday, as well as those that lack paid staff time to train and supervise volunteers, those that lack adequate funds for supporting volunteers, or those that have problems with absenteeism, unreliability, or poor work habits of volunteers, are more likely to say they could benefit from training or professional development for staff on how to work with volunteers. This suggests that efforts to provide avenues for such training could pay dividends in improved volunteer management.

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[2]LBJ Associates, *Corporate Volunteerism: Innovative Practices for the 21st Century*, 2001.

Kathryn Troy, *Corporate Volunteerism: How Families Make a Difference,* New York: Conference Board, 1997.

Dwight Burlingame and Dennis Young, ed., *Corporate Philanthropy at the Crossroads*. Bloomington: Indiana University Press, 1996.

Next Steps

This briefing report on volunteer management capacity in America's charities and congregational social outreach programs provides a glimpse of some of the challenges and opportunities that organizations face to effectively manage volunteers. The sponsors of this research invite an ongoing dialogue about the implications of these findings. Our goal is to examine these results thoughtfully with many volunteer managers, nonprofit and congregational leaders, funders, and others and formulate specific recommendations that can be shared and implemented widely.

We encourage this briefing report to be shared broadly and invite comments about the findings and recommendations for action.

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Comments submitted will be shared with the USA Freedom Corps, the Corporation for National and Community Service and The UPS Foundation.

Comments and recommendations received through this online forum, and through additional meetings with nonprofit, congregational and volunteer leaders throughout the country, will be released formally in a report at the National Conference on Community Volunteerism and National Service, June 6-8, 2004, in Kansas City. The goal of this report is to share effective practices and recommendations widely among programs engaging volunteers, funders, policymakers and leaders.

About The Project Sponsors

The volunteer management capacity survey project was launched by the USA Freedom Corps. The project was supported by the Corporation for National and Community Service and The UPS Foundation. The research was conducted by the Urban Institute.

The Corporation for National and Community Service. The Corporation for National and Community Service provides opportunities for Americans of all ages and backgrounds to serve their communities and country through the Senior Corps, AmeriCorps, and Learn and Serve America programs. Working with national and community nonprofit organizations, faith-based groups, schools, and local agencies, the Corporation engages Americans in meeting critical needs in education, the environment, public safety, homeland security, and other areas while fostering the habits of good citizenship. The Corporation and its programs are a key part of USA Freedom Corps, the White House initiative to help all Americans answer the President's Call to Service. For more information, visit www.nationalservice.org.

The USA Freedom Corps. The USA Freedom Corps, a White House office and coordinating council, was created by President Bush to foster a culture of service, citizenship and responsibility in America. The USA Freedom Corps is working to help every American answer the call to volunteer service by strengthening and expanding service opportunities to protect our homeland, support our communities and extend American compassion around the world. For more information, please visit www.usafreedomcorps.gov or call 1-877-USA-CORPS.

The UPS Foundation. Founded in 1951 and based in Atlanta, Ga., The UPS Foundation identifies specific areas where its support will clearly impact social issues. The Foundation's major initiatives currently include programs that support increased nationwide volunteerism, family and workplace literacy and hunger relief. In 2003, The UPS Foundation donated more than US$38 million to charitable organizations worldwide.

UPS is the world's largest package delivery company and a global leader in supply chain services, offering an extensive range of options for synchronizing the movement of goods, information and funds. Headquartered in Atlanta, Ga., UPS serves more than 200 countries and territories worldwide. UPS's stock trades on the New York Stock Exchange (UPS), and the company can be found on the Web at UPS.com.

The Urban Institute. The Urban Institute (www.urban.org) is a nonprofit nonpartisan policy research and educational organization established to examine the social, economic, and governance problems facing the nation. It provides information and analysis to public and private decision-makers to help them address these challenges and strives to raise citizen understanding of the issues and tradeoffs in policymaking.

Methodology

The volunteer management capacity study is based on surveys of separate populations of U.S. charities and congregations. A sample of 2,993 charities was drawn within expenditure and subsector strata from 214,995 charities that filed Form 990 with the IRS in 2000. A sample of 1,003 congregations was drawn within denominational strata, including an oversample of non-Judeo-Christian congregations, from 382,231 entities provided by American Church Lists in August 2003.

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

Responding charities were weighted to represent the expenditure and subsector 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 that our samples reflect the characteristics of the working populations from which they were drawn, the results of the study reported in this brief are based on the weighted responses.