

[00:00:00] **Betsy:** We have a few folks starting to join us today. Come on in. We're gonna ju just give it just a couple minutes while folks are entering the room. We are so grateful to have you with us today. Thank you Love seeing all the participants showing up. Hope everyone's having a lovely Thursday. It's great to see all of you and just get our, oh, I'm gonna stop this chair and fix my screen real quick while just give everyone just a moment to settle into the room while people are joining us.

[00:00:50] So glad you are here with us today, and I'm gonna share my screen again.

[00:00:58] Okay. There we go. We got it. Welcome everyone. We are so glad to have you. I know a couple more folks are entering up. It's always hard to go from one Zoom meeting to the next, isn't it? So we are so glad you're here for this hour. You have a great, uh, lineup of panelists ahead to join us today. So settle on in while we are waiting for the rest of the participants to join us today.

[00:01:24] Please feel free to use the chat feature. We should have that enabled for everyone. And yes, we do. Great. So feel free to share in the chat. Uh, hello. Where you're zooming in from, what organization you're with, whatever you would like to share, we welcome you to use that feature throughout today's session.

[00:01:47] So go ahead and say hello if you have a moment, and we would love to hear from you. All right.

[00:01:57] All right, well, I think we are about ready to get started. Excellent. I'm seeing hellos fantastic. Florida, Maine, Arizona. Nice. Good to hear everyone, or at least see everyone. The notes from everyone. Pennsylvania, another Arizona, Pennsylvania. Fantastic. Thank you so much for being with us, Ohio. Oh, Minnesota.

[00:02:25] Fantastic. All right, great. Well, it's good to see everyone. Thank you all so much for being here. There may be additional folks joining as we go, which is fine, but we wanna be, um, you know, respectful of everyone's time. So I think we'll go ahead and dive right in. So, um, welcome for, welcome to all of you for joining our session today.

[00:02:46] This is our second webinar. For the Initiative for Strategic Volunteer Engagement, we had our first launch in February, but today is really our first session that is devoted to tailoring the needs of the funding community. So we're excited to have so many funding organizations in the room. I know we

also have some nonprofits joining us today, so, You are going to hear some great, uh, information that will help you when you're partnering with your own funders as well.

[00:03:16] So we're grateful all of you could join us. Uh, my name is Betsy McFarland and I serve as a co-director for the initiative for Strategic Volunteer Engagement with my, uh, colleague Jeff. Uh, or my partner in crime as I sometimes like to say. Uh, and Jeff unfortunately couldn't be here with us today, and he was so sad to miss it.

[00:03:36] But, um, I am fortunate to have the good, uh, good fortune to be working with Jeff on this initiative along with so many wonderful partners. And as we get started today, as I mentioned to those of you a moment ago who joined, you are welcome to use the chat throughout today's session. Um, so please keep those coming and we'll give you a few more housekeeping tips in just a moment.

[00:03:56] But I do wanna share a few acknowledgements with you. You and also just a little bit of background about the initiative. And so in terms of acknowledgement, we do wanna give our sincere thanks to the these three, uh, organizations who partnered with us for this webinar today. Uh, geo, which is grant makers for effective organizations.

[00:04:18] Pace, which is philanthropy for active, civic engagement and independent sector. Um, we are thrilled to have them as partners in this effort because we all truly believe in the power of strategically engaging volunteers in order to meet missions. And I also want to give you a little bit of background about the initiative itself.

[00:04:38] Um, this is really a joint effort of a number of funders and nonprofits who. Came together in order to elevate and provide further support for, um, strategic volunteer engagement. And, you know, we wouldn't, this effort would not have been possible without these important partners at the table, including the lead foundation, the Lodestar Foundation Volunteer Match, the National Alliance for Volunteer Engagement and U J A Federation of New York.

[00:05:10] And we also wanna offer a special thanks to Fidelity Trust. Sorry, Fidelity Charitable Trust Initiative. Um, they provided funding to help us, uh, share the research that you're gonna hear some about today and to provide, um, these campaign resources and webinars to support getting this information out into the field.

[00:05:31] So huge thanks to them. And as we, um, we have spent the last year as an initiative conducting research, doing surveys of nonprofits and funding organizations, and interviewing more in depth funders to better understand how all of these different partners and players are viewing volunteer engagement.

[00:05:51] Understand the trends that are happening this in this. Day and age with volunteerism and using that to really drive some of the new tools that we're going to be sharing with you today and to help you to apply this important strategy to your own organization. And in fact, many of you are. The first organizations here to be able to get a sneak of our, um, our new guide is our conversation guide called Activating the Power of Strategic Volunteer Engagement for a Better World.

[00:06:23] And it was designed to help both funders and nonprofit leaders. To begin to have a conversation together about how they can better support volunteers and organizations and what that takes in order to do it with intention and good strategy. So you will be able to download your copy of this important guide, and we hope you will find it useful.

[00:06:45] I'll also be sharing some tips from that guide towards the end of today's session. And in terms of those housekeeping, uh, notes I mentioned a moment ago, just, uh, feel free to continue to use the chat box to communicate with one another and with all of us if you have questions, we're gonna have a, a section, we're gonna allow about 10 to 13 minutes or so for q and a later in the hour.

[00:07:07] And if you do have a question for any of our panelists, we welcome you to submit them and we ask that you do so using the q and a feature in Zoom and that's different from the chat feature. So on your Zoom black bar you should see something that says q and a. So please reserve that just for your questions that you have of the folks who are, um, presenting today.

[00:07:30] That way we don't lose your questions amongst all the other chat that's happening in the chat box. Uh, and without further ado, I wanted to. Uh, let you know. We have these great speakers lined up for you today, and you'll be hearing from each of them. Uh, we have Dr. Sue Carter Kahl, and she's going to be sharing with you some of our, uh, great research, uh, that we have done and how this applies to volunteer engagement.

[00:07:56] Tracey Bilski with UJA Federation of New York about how they are supporting as a, as a funder, their grantees through strategic volunteer engagement. And Jerome Tennille, who is with the Uplift Agency and formerly

with Marriott International, about how even social corporate responsibility ties into all of this.

[00:08:15] And so we are excited to be able to help you to leverage that power of volunteers in your own efforts as you go forward After. Today's session, we hope we will help you catch that bug. And it's important to note too, as we go into today's session that, you know, over the last few years, you know, all of us have faced a lot of different challenges from the pandemic to economic and insecurity, to threats to democracy, racial injustice, just to name a few.

[00:08:45] And you know, as a result, a lot of funders and organizations have rightly been focused on a number of key priority areas, including the three you see here on the screen. Civic engagement, capacity building, and equity. And you know, we were finding in our research and in the work that we're all doing out there in the field, that there are a lot of connections amongst all of these issues to strategic volunteer engagement.

[00:09:10] That strategic volunteer engagement is a really important form of civic engagement. That strategic volunteer engagement can expand organizational capacity and help better deliver on missions and civic engagement, sorry. Strategic volunteer engagement is also, you know, an important vehicle for mitigating power dynamics and helping organizations to truly engage in a meaningful way all members and voices in the community.

[00:09:35] And so we just wanted to share this with you as some framing for today as we go forward. And the quotes you see on the screen here are actually from our research participants in the qualitative study that Dr. Sue Carter Kahl conducted for the Initiative. And it is my great pleasure to be able to first turn this over to Sue to talk about some of what she found and what we've been learning.

[00:09:59] And Dr. Sue Carter Kahl is an independent scholar president of Sue Carter Kahl Consulting and author of our study. Um, she's dedicated her professional life to working and volunteering within the nonprofit sector and helps organizations collect and make meaning from their data to enhance organizational decisions.

[00:10:17] Uh, she's a nationally recognized expert in volunteer engagement and a volunteer herself. Which I love. Uh, she has a PhD in leadership from the University of San Diego and a Master's in Social Work Administration and a certificate in nonprofit management in case she needed any more credentials. So without further delay, I would love to turn it over to Sue.

[00:10:40] All right, and let me do that and I need to spotlight Sue, so let me turn it, let me really turn it over to Sue. There you go. All right.

[00:10:48] **Sue:** Thanks so much, Betsy. Appreciate it. So I'm gonna highlight today some of the findings from the research that Betsy mentioned already. So we had surveys with nonprofit and philanthropic leaders, and then the qualitative interviews and focus groups with a number of grant makers.

[00:11:05] And all of the findings are from here, and you'll be connecting some of these insights into the recommendations later on. So let's get started with that. I imagine that, oops, trouble forwarding there. There we go. So this is probably not news to most of you who are on the call, that, um, there's been an increase in demand on nonprofits since Covid-19 has started.

[00:11:28] For those, uh, nonprofit leaders who responded to the survey, 64% of them responded that they had. Witnessed an increase in demand for their services and for 51% of those respondents, that translated to an increase in delivery of services, and for 46% of them, that translated into an increased workload for their paid staff members.

[00:11:50] At the same time, a lot of organizations are having a hard time finding and keeping volunteers. In fact, just 13% of the respondents said that they had more volunteers now than they did before the pandemic started. And that brings, um, highlights really one of the challenges that came through as one of the primary findings from the, the research overall was that volunteers and the volunteer engagement function are often hidden in plain sight.

[00:12:17] Even though a number of funders said that they were interested in supporting volunteer engagement, um, there wasn't a lot of attention in the grant making process for that. And we heard funders over and over saying that, you know, volunteers are how the work gets done in many agencies in partnership with paid staff.

[00:12:33] And so the findings today are really, um, framed around how do we make the volunteer engagement function more visible? One of the ways that we talked about doing that was by asking funders, well, what would be compelling evidence? Oops, another delay here. Just a second. Whoops. Okay, now it's all going a little wonky here.

[00:12:56] So we wanted to know, um, you know, what does that funding process look like? 28% of the funders said they had never received a request for volunteer engagement. Of the nonprofit leaders, 19 to 24% of them said they

had never requested it. And though there was a reason for those two numbers is because some of it was for funders and some of it was for corporate funders, grantmaker versus corporate funders.

[00:13:20] And 28% of those respondents said the reason they weren't asking was because they didn't think it was something that their funder would support. And so they, um, so this just highlighted a few more ways that, um, volunteer engagement might be getting lost in the process. All right. There's a little delay while things move forward.

[00:13:42] I'm gonna wait for that to go. Okay. So here's where we are asking, you know, what kinds of evidence might be compelling to funders about volunteer engagement? If they're interested in it, what can we be sharing? And received a lot of great, um, responses. Um, took pages and pages of notes about it. And so I was really curious then for this next question about.

[00:14:03] You know, so what kinds of evidence are you collecting as part of the grant process? And the response to that more often than not was not much. And so it was really interesting to hear that there were all kinds of ways we could be talking about volunteer engagement strategically in the organization, but that that wasn't, again, part of the process.

[00:14:22] And so we said, well, what would that look like if you did talk about it? What would be compelling? First and foremost, we talked about numbers, the ones that come up all the time, right? Numbers of volunteers, numbers of hours, perhaps that wage replacement rate, the value of a volunteer hour. And what a lot of folks said was, you know, we don't really know what those numbers mean.

[00:14:41] We need context for those numbers. Are those numbers good? Does that mean they have enough volunteers to partner with the paid staff? Do they have the right types of volunteers? Um, what kind of roles are those volunteers? And so they wanted to know what do those numbers mean to the agency and what does that tell us about how volunteers are contributing to the work?

[00:15:02] Furthermore, there was interest in, um, finding out what were the benefits and results of volunteer time. They wanted to know what happened because volunteers were making contributions. And so that could have been like what roles were volunteers, um, in and what ways were volunteers contributing quantitatively to project outcomes or program outcomes?

[00:15:23] And how did they contribute qualitatively, um, to project outcomes. There also was an interest in the leverage or value add or return on investment. These were all, some of the terms that funders were using to say, you know what? We know that volunteers are helping extend the mission. They're helping extend the budget.

[00:15:41] We would like to know more about the ways that that is happening in the agencies. And furthermore, they knew that volunteers were more than just a source of labor, that they were more than their time and talent. That volunteers, in fact, could help advance agency goals, like recruiting more volunteers, like recruiting donors or raising money or volunteers becoming donors or joining the board.

[00:16:03] So there were a lot of ways that they saw that Volunteers, yes, were completing tasks and projects, but they also were contributing to all of the other things that helped volunteer organizations be successful. And so we were also interested in knowing, okay, well one of the things we can do. Understand a little bit more about the dynamics.

[00:16:24] Why are funders investing in volunteer engagement? Why aren't they? And so we asked them both of those questions and organized them because we had so many responses. They fell really into kind of three categories that aren't neat and clean and discreet, but. Really fell into community agency and funder goals.

[00:16:41] So first of all, we heard that the reason funders were investing in volunteer engagement was because it helped amplify and activate voices in the community. It got more voices of the community represented, and sometimes that could really help, um, mitigate some of the power dynamics and power differentials that have, um, that happen in communities.

[00:16:59] They also knew that volunteer engagement when done well, helped build the organizational capacity that this was something that could help make it more sustainable and supported overall. And then finally they knew that, you know what? We have money, but we're not the ones delivering the services. That's falls to our grant partners.

[00:17:17] And so one, uh, grant maker said, we have a goal to serve more kids, and we know that if we support volunteer engagement in organizations, that helps them. Engage the community in the work and serve more kids and serve those kids better. We also were really curious to know why funders were not investing in volunteer engagement or what might cause them some concern.

[00:17:38] And the first one really centered again, on community. They said, well, we're not always sure that volunteers are a high quality, uh, resource for organizations. Sometimes they're flaky, sometimes they don't show up, sometimes they go rogue, or they're not held to the same kinds of standards. And so they wanted to know, you know, are organizations really investing in volunteers so that these things don't happen?

[00:18:00] They knew that volunteers could contribute to the agency's capacity, but that it also took capacity to engage volunteers well, that there had to be some conditions met so that volunteers could be effective for the agency and and really be a partner in a net resource instead of a net loss. They weren't always sure that agencies, um, had volunteer engagement on the agenda or that they were prioritizing as an organization.

[00:18:25] And next, the, finally the funders had some concerns. They said, you know what? Some people really, you know, would rather support programs instead of operations. Although they said that's really an education process. Those are two sides of the same coin. And they also had some concerns. Sometimes, you know what, we know volunteerism can do good things, but sometimes it doesn't work out the way they hope.

[00:18:46] And so because of that, um, that uncertainty, they said this feels a bit of a risk to invest in sometimes. And so those were all of the things that came out in the research. Um, I'm gonna turn it over now to Tracey Bilski, who's with uja a Federation of New York, to talk about the ways that they're making it visible in their process.

[00:19:07] Uh, Tracey is the Chair of Time for Good and is really overseeing this role in UJA Federation of New York, um, in a, in a very hands-on kind of way, um, that extends her professional experience as well. So I will turn it over to you, Tracey.

[00:19:29] **Tracey:** Thank you. Thank you, Dr. Kahl. Just gonna work on advancing the slides. Here we go. So I'm thrilled to be with you all today, coming to you from New York, and I'm excited to share information about UJAs work in this space in strategic volunteer engagement and how our philanthropic investment in the AR in this area has driven impact for us. So U J A recognized strategic volunteerism is a vital asset and is critical to an organization's ability to achieve its mission using volunteers strategically, as we have seen, especially during covid builds more people-centered, dynamic, sustainable, or organizations with the capacity to meet growing needs in the community.



[00:20:06] So what is UJA Federation? For those who are not familiar, we are a philanthropy based in New York, caring for all people in need across New York, responding to global crises and helping to shape our Jewish future. We're a very complicated organization with hundreds of nonprofits in our network, 70 countries around the world, serving 4.5 million people and supporting day schools and grassroots organizations.

[00:20:35] So I'd like to share with you, um, that one of these areas, um, of, that, of capacity building that we're looking at is strategic volunteerism. We support our network of agencies in a number of ways through programmatic grants, various funding opportunities in this capacity building. So UJA has invested 10 million in building strategic volunteer programs at 35 organizations over the past eight years.

[00:21:01] And why do we do this? Volunteerism is a low cost intervention to sustain and scale the work of our nonprofits addressing the priorities of today and the needs of the communities around them tomorrow. I wanna share with you a snapshot of our work. This is for the Time for Good Committee, um, in our Caring Department, um, which I'm involved in, um, for fiscal year 2022.

[00:21:25] So we invested 1.7 million in 20 organizations with a total number of volunteer hours of 194,589. And here we're going to do the math with you, um, with how we're calculating some of the value of this. The average value of a volunteer hour in New York is \$31 and 17 cents. So we do the math and we find out that that investment of 1.7 million, um, in these organizations and in the capacity building for volunteer engagement, brought us a value of 6 million.

[00:21:58] Now, when we, how else do we look at that? We take a look at these hours and we take a look to, uh, at the staffing, and this is the equivalent of, um, 93 full-time, um, professional volunteers. This is only one way to tell the story, of course, and it doesn't highlight, um, the social and emotional impact on the volunteers or the impact these volunteers are having on the services or programs that they're making possible in their community.

[00:22:24] So what are UJA strategies to drive impact? And we work at various levels. I'm going to take us through three different strategies. Firstly, at an agency level, we work with individual organizations to coach them on how to create strategic volunteer programs. How do we do this? We hire excellent volunteer engagement consultants to coach organizations and how to operate strategic volunteer programs.

[00:22:50] Organizations learn how to recruit onboard. Retain volunteers as well as identify which programs are the most strategic for the volunteers to be incorporated. These examples on the screen are some of the philanthropic priority areas of our caring committee, the digital food pantries, employment services, older adults, and mental health.

[00:23:11] We provide program grants, um, to expand these services, um, in these spaces. But we also care and provide grants to these organizations to expand the work that they do with volunteers. We've definitely seen that impact and coaching is the first step. So after coaching, then, um, as a way to help these organizations incorporate these best practices that they've learned through the, through the coaching, we help them with funding volunteer engagement programs.

[00:23:41] And these are some of the line items that we're willing to fund, uh, for these organizations that we work with. Volunteer engagement, professional salaries, volunteer recognition expenses, volunteer reimbursements, training for volunteers. Background checks, volunteer tracking software. These are just some of the examples that we encourage in our grant budget request.

[00:24:05] And then internally, we work at different levels within UJA. We work together with our colleagues and people in other subject area committees to manage various grant per uh, portfolios. And we think with them about these priorities that they have and how volunteers could be leveraged in these areas.

[00:24:24] We recommend that they think about including language in their funding applications, to encourage organizations to think about volunteerism as part of their program. So much so that we recommend the organizations embed volunteer costs into their program request for funds. So here's an example of a program budget supporting older adults.

[00:24:43] See our red arrow on the screen. The organization included funds to support a volunteer coordinator, coordinator. Now this is being funded by another committee at UJA. So we're thinking about volunteers at different altitudes. At the highest altitude, we are looking to shift the way the field views strategic volunteerism.

[00:25:02] As funders, we provide and manage a general operating budget of 34 million partner organizations receive an application to apply for these funds. And one of the 30 questions asked here it is one of the 30 questions asked on the applications is here on the screen. In what ways do volunteers help your organization elevate program outcomes for clients?

[00:25:26] Increase or expand the delivery of service or, and or add value to the overall organization. Does your agency currently have a professional who's focused on managing volunteers? What this question does for us is twofold. It expresses to the organizations that we view, um, organizational excellence in the way in which they use their resources by incorporating volunteers into their ability to deliver services and then further to professionalize this area.

[00:25:54] Um, to be able to, um, go with a, have professional volunteer managers. So we're really trying to shape behavior and message to our org, our network of organizations, how important volunteerism to be built in. So I'd like to try to answer two questions for us. What can funders do now? So our favorite is ask the questions when you're meeting with a nonprofit organization.

[00:26:18] Ask them currently how they're using volunteers within the overall organization or a specific program or service. Or even better ask them how they might envision using volunteers if they had the resources to support that strategy. Next, incorporate language into request for applications. That's something that we've discussed today.

[00:26:38] If you're putting out a request for applications and you know that volunteers might be used, ask organizations to add in related funds to support that. We see so many organizations submit their budgets and they have all kinds of line items, but before this encouragement, rarely did we see line items related to volunteer expenses.

[00:26:55] And we know most times volunteers are essential to many of the programs we're funding. Like food pantries as an example, include volunteer engagement language and funder guidelines. Simple. Lastly, provide coaching and training for organizations on how to integrate volunteers. Now, when I said that volunteerism is a low cost strategy, it is not a no cost strategy.

[00:27:16] When we think about it in our work coaching organizations, it costs us between five to \$10,000 to coach an organization on how to strategically use volunteers. And after a year of these organizations working with our engagement professionals, they're completely transformed. And some of these expenses that we discussed related to funding these volunteer programs are really low costs and they do make a big difference.

[00:27:39] So now what can nonprofits do? And I know we have some nonprofits here with us, um, as well as those who serve on boards. So same as the top. Ask the questions. Um, explore how volunteers can help to sustain and

improve the programs. Oftentimes this takes a kind of team with the OR within the organization to go around and to think at many different levels.

[00:28:00] Hire a volunteer consult engagement consultant. Also low cost. Finally, educate funders and stakeholders on how volunteers impact your organization. So maybe your organization is not yet set up to collect, collect metrics on volunteer hours, but you have those stories. Track them, write them down, and start to share them.

[00:28:19] We rarely see organizations asking funders to support volunteerism at the start. The answer for us is usually yes, take the chance, ask the funders, uh, to fund volunteer expenses. So I thank you so much for the opportunity to share some of our experiences with you on the trans, uh, formative, um, impact of funding of volunteer engagement Next.

[00:28:43] I'd like to, uh, introduce Jerome Tennille. Jerome is the Director of Social Impact and ESG at the Uplift Agency. He is the former Manager, Social Impact and Volunteerism at Marriott International. In his work at the Uplift Agency, Jerome is responsible for leading the social impact work for Uplift's corporate clients.

[00:29:03] He helps companies navigate through the social goods space by expertly creating CSR programs, volunteer engagement opportunities, and sustainability and philanthropic giving initiatives. Jerome is the co-author of the book, Transforming Disruption to Impact Rethinking Volunteer Engagement for a Rapidly Changing World.

[00:29:22] He is involved with the National Alliance for Volunteer Engagement and is also a veteran of the United States Navy. Please welcome Jerome Tennille.

[00:29:32] **Jerome:** Uh, thank you so much for the wonderful introduction and, uh, certainly for having me today. Uh, I'm gonna talk very briefly about the intersection of corporate social responsibility and, uh, strategic volunteer engagement.

[00:29:42] And more specifically, you know, how volunteerism exists within a corporate landscape. And the implications of not funding these types of programs, uh, adequately. Um, but first, um, I really wanna start off by level setting and really defining like what corporate social responsibility is. Um, it really refers to a company's commitment to conducting its operations in a

socially and in environmentally responsible manner, and really taking into account its impact on society, the environment.

[00:30:08] And also, um, all of its internal and external stakeholders. And this certainly involves, um, integrating social and environmental concerns into a company's operations and their interactions with these various stakeholders. Um, and when I say things like internal and external, like internal stakeholders might include the employees that manage very different lines of business within the company.

[00:30:29] Um, but externally, uh, that's also the customers. It's. Suppliers, vendors, uh, sometimes shareholders for public companies, um, but also the communities that they're seeking to serve.

[00:30:43] There we go. Um, so CSR it takes on many different forms, um, but it actually includes many things like corporate philanthropy, uh, environmental sustainability efforts, and even like labor practices, but much, much more. Um, it also includes employee volunteerism, which is fairly common. Um, obviously the objective of CSR is to really go beyond a company simply maximizing its profits.

[00:31:06] Um, the last thing I'll sort of share on this and on this particular point is, um, to make sure that folks understand like how CSR exists within the current corporate landscape, uh, and the increased focus on an acronym that some might have heard it's ESG, or, uh, environmental, social and governance.

[00:31:25] And I'm not gonna go into all the de all the details about ESG and what that is, um, but just know that CSR is an integral part of the social aspect. Of ESG, um, other terms that you may have heard is corporate citizenship, corporate social impact, and even, uh, community relations.

[00:31:46] Um, so the natural question is, well, what does volunteering have to do with CSR? Um, well, volunteering to me is one of the tools. It's one of the many tools, uh, in corporate social impact and the playbook that a corporate social impact pro professional would use. Um, just like corporate philanthropy, uh, the mechanisms that engage people in volunteer service are one of the many.

[00:32:08] That can also be leveraged by a company. Um, and this really shouldn't be a surprise. Um, you know, most large corporations have very formalized, uh, volunteer programs for their employees. But I would also say that even small and medium-sized businesses also, uh, encourage some form of

volunteerism with the different community-based organizations as one form of employee engagement.

[00:32:30] When you think about it, it makes a lot of sense. You know, we know that employees are five times more engaged in companies with employee volunteer programs. Um, even younger generations have higher expectations of how companies serve, where they work and play. Uh, employees are increasingly choosing employers that they believe are socially conscious and focus on more than just making, uh, profits.

[00:32:53] Um, there is an increased pressure by consumers. As they prefer socially and environmentally conscious brands in terms of who they're purchasing goods and services from. And so as a result of that, Um, you know, companies are increasingly, um, offering employees, um, policies and benefits like paid volunteer time off, and so like to take volunteer time off as one example.

[00:33:17] It's becoming an increasingly popular tactic to keep employees engaged while also improving local communities. Um, you know, some statistics indicate that more than half of all companies offer some form of. Paid volunteer time off, and we expect that to actually increase, uh, over the next year. Um, also close to 90% of corporate leaders also have an expectation that their employees support their company's social causes.

[00:33:43] And volunteering isn't just the thing that large corporations do. Um, there are some, uh, statistics that indicate that small businesses. Volunteer at higher rates in their local communities than their corporate counterparts. So I share all this because, um, these statistics, they really highlight the importance of developing effective corporate volunteer programs.

[00:34:03] But in order for those programs to be effective and to execute accordingly, they actually require a great deal of funding.

[00:34:13] Um, What I'll also share is that there's a major resourcing gap that does exist within corporate responsibility. Um, most corporations and their corporate foundations actually don't fund strategic volunteer engagement. Um, most will share that. That's because it's not a program expense or that it's, it's considered overhead or administrative.

[00:34:32] Um, as a result, the mechanisms that are engaged or that are designed to engage employees in service are oftentimes the least funded or not funded at all. But at the same time, it's really important that we acknowledge

that these same companies place an enormous burden on the nonprofits to host their employees with the expectation that those nonprofits maximize engagement.

[00:35:01] So when I talk about maximum engagement or maximizing engagement, what I'm actually referring to are some of the numeric goals that companies set. Um, these are often, um, quantitative or output focused goals that. Might be publicly facing, right number of volunteers engaged, the number of hours an employees, uh, have served across the globe.

[00:35:22] Um, these types of goals, they actually only incentivize companies to engage in mass volunteering events that actually require a, um, a, a great deal of funding. Um, you know, an example of this is the, you know what a lot of folks, including myself call the, the dreaded corporate day of service. Um, when I used to work as an in-house corporate responsibility professional, we actually had a goal to serve 15 million, that's million with an m um, hours of volunteer service by the year of 2025, um, in practice to actually achieve that goal.

[00:35:56] Um, companies with similar goals, they often engage in tactics like placing very specific dates, times, and capacity requirements for their hosting nonprofits. Um, for any nonprofit to make such accommodations, it actually usually requires that that same hosting organization change. To some degree their service delivery model.

[00:36:17] Um, it's incredibly costly, um, to do that for, for most organizations. Um, that change to accommodate the company will actually come at the expense of that hosting organization. Um, and. When we actually think about this, um, you know, it makes a lot of sense when you think about it that way, that companies should actually fund core, you know, uh, uh, strategic volunteer engagement because both the community impact of we, as we've heard, and also employee experience actually depend on this.

[00:36:51] Um, for the employee engagement angle, um, for companies, um, you know, the act of volunteering is actually tied to an expectation that the employee has a great experience because it actually can increase a company's employee engagement score. Um, yet in my estimation, the lack of funding actually results in a diminished experience for those same employees and for the hosting organizations.

[00:37:14] Um, the lack of funding it results in the nonprofits having too few staff to manage these same events. The lack of funding also resorts. Uh, it, it results in, um, sometimes, uh, too little work to do and think of your tangible kit

builds that are oftentimes expected by corporations. Um, the result of too little work to do oftentimes leaves employees feeling as though they didn't do enough.

[00:37:39] Um, it also reduces the nonprofit's capacity to engage that same company strategically, which results in hasty and costly programming. Um, you know, I often hear funders say they value volunteers, so, yet, it hasn't actually translated into supporting strategic volunteer engagement. And, uh, I'm gonna share a quote that I heard recently during a televised speech.

[00:38:01] Uh, this individual, they said, don't tell me what you value. Show me your budgets and expenses and I'll tell you what you value. And when I heard that last week, it was so powerful. Um, so if we understand it that way, um, I would just challenge others to position volunteer engagement as something to fund.

[00:38:25] And here's some recommendations. Um, I would make, I think first, um, we must shift the mindset from understanding volunteering as a thing to achieve to the mindset of volunteering as a tool to achieve a programmatic outcome. And what I mean by that is volunteering isn't the end goal, even though it might be the numerical goal that is tied to a corporate responsibility program.

[00:38:50] Volunteering actually helps organizations achieve their goals as one of those tools and mechanisms. And related to this, I would also challenge those here today to fund mechanisms that engage employees in service because in my estimation and experience, doing so will increase the chances for greater experience.

[00:39:07] It will provide, um, the hosting organization with the necessary funding for projects that require volunteers, and it will also create the greater capacity for organizations. Thus increasing access to opportunities while, you know, operating more efficiently as a nonprofit. Um, and I get it, you know, I know that this is certainly easier said than done, but in my estimation, these are the changes that we need to make.

[00:39:32] Um, but with that, uh, that concludes my portion of today's presentation and I'm actually gonna turn it back over to my colleague and the, the is v e co-director Betsy McFarland, who's gonna talk a little bit more about strategic volunteer engagement and practice. So, and with that, take it away, Betsy.



[00:39:50] **Betsy:** Thank you so much Jerome, and thank you also, uh, Dr. Sue and Tracey what phenomenal information you all are sharing today. Um, as I just wrap up a few uh, points before we open the Q&A, um, while I'm doing this, please be thinking about the questions you may have for Tracey, Jerome, and Sue, because this will be your opportunity to ask any burning questions that are on your mind about what you have just heard, which we hope is as inspiring to all of you as I always find it to be to my for, for me as we do this work.

[00:40:21] But, um, now that you've participated today, you know, we wanna kind of wrap up a few things that you will hear or read about in the. New guide that you will all be receiving and can download, which is activating the power of strategic volunteer engagement for a better world, which I mentioned. And I just wanted to kind of reiterate a few things that, um, our panelists here really highlighted, uh, today.

[00:40:44] And that is, you know, when we invest in strategic volunteer engagement, and I think our, all our speakers really proved this out, that our organizations are so much stronger and more effective and efficient. Operations and we have more people power to actually meet the mission and deliver the services the community needs.

[00:41:06] And as funders, we can achieve, receive a greater turn on our investment and really leverage all of the power the community can bring to any problems we're trying to solve. And of course, we can enhance the community voice and involve such a greater number of people in these different causes across our own neighborhoods.

[00:41:25] And so hopefully it has been a very compelling reason to support volunteer engagement. But I do also want to share. And kind of a summary here, like 10 specific steps that you've heard to some degree from our speakers today. But I just wanna summarize briefly for you, 10 steps that you, yourselves can take, and one is, as you heard from Tracy, make your support for volunteer engagement visible if you're a funder.

[00:41:50] Uh, allowing for grants, please include a question about how volunteers are engaged in supporting programs on your application so that this can become a conversation. Uh, diversify and track the impact volunteers are having Reach beyond simply asking, how many volunteers do you have? And how many hours did they give in the last year, but really started diving in on what impact did they deliver.

[00:42:13] How many people were they serving? How much of an impact did it have on the mission? That organization is devoted. To achieving. So really begin to think about what it is those volunteers are actually accomplishing. And then three is keeping that volunteer engagement conversation on the agenda, asking for updates from your grant partners.

[00:42:35] Um, you know, ask them how things are going, what's working well, where are they having challenges? Seek information about the volunteer engagement on your reports. And for budget, for volunteer engagement, capacity and operations, uh, you know, you can, as you saw from our speakers, you could ask them to include line items to perhaps fund a volunteer engagement coordinator or to pay for software to manage volunteer operations or train staff and how best to work with volunteers.

[00:43:03] There's a lot of different ways that can be funded. And as you heard from Jerome it's critically important that the nonprofits receive that support in order to do this well. Um, in fifth pool funds with peer organizations. You know, can you have conversations with other funders that you network with?

[00:43:19] How can you amplify the work of your grantees and their efforts to engage volunteers? And cultivate number six, that community collaboration. Uh, so many folks on the around this table have such great ties to other funders, to other nonprofits. Can you make introductions between your partners and others in the community to, again, help build upon success?

[00:43:42] Number seven is promote professional development. There are plenty of, uh, tools out there and organizations that can provide support to organizations in their strategy to engage volunteers. Um, you can perhaps underwrite the ability for a volunteer coordinator to become certified through the Council for certification in volunteer administration.

[00:44:03] Or look into having your grant partner organization become Service Enterprise, which is now being run through a live, which is the Association of Leaders in Volunteer Engagement. There's lots of tools out there that you can find at our website [strategicvolunteerengagement.org](http://strategicvolunteerengagement.org). So we encourage you to help organizations to achieve.

[00:44:23] Um, better practices when it comes to volunteer engagement. Eight. Support and share the research. We have lots of tools. Be sharing this. Read it, digest it, share it with your other funding partners. Share it with your grantees. Nine, become an advocate yourself. We hope the fact that you are here today

means you already are an advocate and we're just looking for ways to deepen that support.

[00:44:42] But we welcome you to share this information with others. And 10, recognize and, uh, reward those grantees who are doing this work. Well, you know, it takes. Effort. Volunteer engagement is effective because it's designed that way, not by magic. So we wanna reward the organizations who are doing it well and hold them up as great ambassadors for this work.

[00:45:03] And with that, um, you know, those are 10 steps that we hope you will take away, and you will have all of this in the guide when you download it. But it is now time for us to shift into our q and a discussion time. So, While we're pulling up, um, our questions that you have been submitted, I am bringing back our panelists here.

[00:45:24] Let me add Dr. Sue and let me stop sharing the screen and make sure that we are all being seen. Excellent. Okay. I did that right. That's always a good first step. Okay. So, uh, let me take a look here at some of the questions that have come in. And it looks like first, actually, Tracy, we're gonna, um, put you on the spot with a quick question, if you don't mind.

[00:45:44] Is there a training framework of the strategic volunteer engagement coaching that U J A does that you would be willing to share?

[00:45:53] **Tracey:** Sure we'd be willing to share out. We have a volunteer accelerator model that we've now, um, been using over the past few years, uh, where it's been extremely helpful in certain terms of where the organization starts and the way we bring them through, uh, with the professional, um, engagement consultants.

[00:46:08] So yes, the answer is yes, we'd be willing to share it.

[00:46:11] **Betsy:** Fantastic. Uh, let me see here. Here's another question. Um, What's worse? Coordinating coordination of volunteer engagement programming with LI little staff Administrative support, or simply not hosting volunteer engagement programs if limited staffing capacity.

[00:46:31] Who would like to tackle that one?

[00:46:33] **Jerome:** I'll jump in on this one cuz I think that's often a symptom of. A, a corporate volunteer program, right. Um, in, in this fashion that I sort of

articulated. Um, well, it depends, right? And I think the question that one has to ask is, is, is the engagement, is it mission critical?

[00:46:50] Is it gonna satisfy something that is mission critical for the organization? If the answer is no, then you have to have the internal conversation about, um, is engaging in this corporate volunteer. Project or, or activi, uh, activation or activity. Is it going to yield the benefits that I believe it's gonna benefit or that, that I believe it's gonna yield?

[00:47:15] Um, and um, if the answers to that are no, then the suggestion is to push back on that in a way that is, um, polite but also educational. And that's the other part that I think is critical to this. Um, there are a lot of folks in corporate responsibility who actually. Don't fully understand, um, the implications of their actions.

[00:47:39] So in those instances, you have to build the awareness that the project doesn't support a service or, or product that you're, that you're, that you're seeking to provide for your community. And then you also have to shift them into, from awareness to understanding of the implications. And it all starts with having a conversation about why that doesn't necessarily serve your needs or your community's needs.

[00:48:05] Um, and at every point try to educate them because they'll go back to their, their company and they'll, they'll have to think about that. Um, and it'll also influence their other engagements elsewhere. Great, great advice. Rome, uh, Tracy or Sue, is there anything you'd like to build on on that question?

[00:48:25] I'll, I'll jump in.

[00:48:26] **Tracey:** I think one of the things that we're seeing with our nonprofit, um, agencies, um, is that they're learning to, to be very upfront about the fact that there are these associated costs and to have those conversations. And, um, you know, there's so many challenges for nonprofits today, um, that they, they have to ask, they have to speak up.

[00:48:44] And so it's, it's an important, it, you know, it's a tough balance, um, when you're also looking for support from these, uh, these companies that are coming, um, or the volunteer groups. But it's, it's an a, a nonprofit. Any nonprofit administrator knows they need to ask this question and they shouldn't be shy.

[00:49:04] **Betsy:** Sue, anything from you on that that you feel we've missed?

[00:49:07] **Sue:** I won't add anything because it looks like we've got some other juicy questions that are popping up.

[00:49:12] **Betsy:** Oh, great. Okay. And here, now that you've asked for one, here you go. In your work, have you found your nonprofit partners to be receptive in thinking differently about the engagement of volunteers?

[00:49:25] And what are your key persuasive points in discussing this with them? Sue, do you wanna take a first stab at that?

[00:49:34] **Sue:** I'll just highlight this from, uh, one of the participants that I talked to in the research who said, you know, we've seen volunteer engagement be effective, uh, as a way to extend the mission.

[00:49:45] Um, and, and we saw an organization, for example, build it into their strategic plan and it really strengthened the whole organization's involvement, um, with volunteer engagement. And they said, you know, we sometimes will, you know, test the waters with others. She said, if there's just no awareness or readiness for it, we don't wanna push it.

[00:50:06] Um, because we really wanna honor, you know, what the needs and readiness is of the, the agency. Um, but for those who do, um, explore or ex, you know, talk about, you know, some, have some interest in it, you know that it's a place to start a conversation, um, about what that might look like or what kinds of resources are out there, or how that's worked in other agencies that have done it.

[00:50:30] Thank you.

[00:50:31] **Betsy:** Tracy. Yeah, I was gonna say, yeah, bet you had something to add.

[00:50:34] **Tracey:** Yes. Right. So I think, you know, one of the things that we see, particularly giving core operating support, in addition to doing program grants and the strategic volunteerism grants, is that an organization will start to have that conversation about their needs.

[00:50:46] And about the increased needs and their ability to deliver services. And so when there's, they're, they, they don't have the ability to hire more staff. They don't have the funding to do that. And they can start thinking creatively about bringing in skilled volunteers to do some of the things that they can't get done.

[00:51:00] Um, it really, it's like the light bulb goes off, and then of course, then there's the hand in hand, well, how do we do that? And that's where the support comes in, being able to work with them. Um, but they're really, it, it's that conversation back and forth that makes a big difference.

[00:51:16] **Betsy:** Great advice. And Jerome, this might be a good one for you to chime in on. Um, somebody here is asking about, uh, wondering if foundations or CSR programs have helped either fund or coordinate skilled volunteer initiatives. Speaking to Tracy's comments just a moment ago, um, with nonprofits and if there are any lessons learned about how that has been carried out, maybe doing more of that skills-based work versus kind of just mass massive volunteer energy coming in.

[00:51:42] **Jerome:** Yeah. So, um, I think that the short answer is yes. Um, skills-based volunteering is something that I would say is probably on one of the more, um, traditional and, um, more common types of corporate volunteering programs because people can leverage their academic and professional skills in the work that they're doing with their nonprofit partner.

[00:52:02] Um, Some immediate lessons, right? So, so I think those are some of the, probably some of the more effective and more tangible types of volunteer engagement because you can tie somebody's profession and their academic experience and the things that they're providing to an organization, you can tie that, um, more clearly to some sort of value, right?

[00:52:29] Using like Department of Labor. Wages, and you can, you can calculate the, the, the monetary value of that. And at the same time, you get very, you get very immediate anecdotal and experiential, uh, data from the nonprofit that they're working with. Because skills-based volunteering is oftentimes focused on.

[00:52:50] Um, some specific subject matter expertise or capacity building activity for an organization. So the outcomes of that are almost more immediate and very, and very easy to track. Um, I don't know that I have any immediate lessons learned that I can share here, but what I would say is, um, connect with me on LinkedIn and I'm more than willing to have that conversation offline because I think there's probably a lot more to unpack there.

[00:53:17] And I could probably provide some very specific examples, uh, beyond the timeframes that we have today.

[00:53:23] **Betsy:** Thank you, Jerome. Uh, any other additional chime in on that question before? I think we have time for one more. Okay. Uh, You have, we have surfaced here today and given voice to those who support strategic volunteer engagement.

[00:53:39] Um, and this attendee is wondering if we are beginning to see growth in new funders supporting this critical activity. Um, any insights from panelists? I can speak for myself, having been a, as a director of this Initiative that. You know, it's uh, certainly there's a lot of interest in this and I think as people better understand what strategic volunteer engagement is, there's a lot of nodding heads and understanding.

[00:54:04] Oh, right. Of course this makes sense. It's just sort of like one of those things, as Sue eloquently described earlier, it often is hidden in plain sight, and it's not something we stop and think about or recognize that it needs to be resourced. And so I think it's sort of one of those things that has.

[00:54:19] Always been here and we just need to keep turning those light bulbs on and helping folks to understand what it looks like to support this and the power that that can have in helping to shape organizations. But, um, Sue, anything you wanna add on that? Cause I know this is a, a hot topic for you as well.

[00:54:35] **Sue:** Well, I think that's really the reason why the initiative is here. Um, so we can help, uh, inspire others to do it, provide resources to do that. Um, and then I think even just with the agencies when I, or with the funders when I was talking with them, There were some light bulbs going on there. Oh, we just haven't told people we would do this, but we could.

[00:54:54] Um, and so, you know, how do we make that more explicit so that people know they can, um, that, that this doesn't feel like a risk on the nonprofits part to include this as part of a, a grant request.

[00:55:08] **Betsy:** Thank you. And that's an excellent segue actually. Now it's amazing how fast our time is going today, but uh, it, it, it's a, it's already five of the hour and I wanna be mindful of everyone's time.

[00:55:19] So with that, I think as we want to continue to spread this word, we want more funders to embrace strategic volunteer engagement. And we feel all of you have an important role to play in that. Um, we would really love for you to please download the conversations. Starter, you can scan the QR code that's

here on the screen, or you can go to the website at [strategicvolunteerengagement.org](http://strategicvolunteerengagement.org).

[00:55:42] And really this is where you play a role, right? We want to elevate strategic volunteer engagement for nonprofits and, and we want corporations to have a great experience when they're sending their employees into those organizations. And we want funders to see a greater return on their investments that they're making in the nonprofit sector.

[00:55:59] So, we really ask that you please help share this, spread this word. Um, feel free to share that conversation guide with any of the folks you're working with or your colleagues, and we welcome you to also share your own story. You know, you're hearing from us today and we would really love to hear from you if you are either funding this type of work and you have some, um, some great examples for us or you know, of others who are doing that.

[00:56:23] We would love for you to reach out to us. We have a contact form for, uh, on our website that you can reach us. And I look at every one of them and we'll, we will absolutely respond and engage with you. So please do contact us and if you would like to bring this topic to your own network. We know some of you represent, um, you know, state councils of funders or other organizations.

[00:56:44] That are, you know, helping to support others in their efforts, we would be happy to host a webinar to your own network. So feel free to reach out with that request and we'll coordinate with you because again, our mission here is to take all of this on the road and continue to ensure that everyone, heres how impactful and valuable.

[00:57:03] Strategic volunteer engagement can be when it, when we look at supporting missions across our communities. So with that, uh, I think we did it with one minute to spare. And I wanna thank all of you so much for your participation today. Uh, we are really grateful you joined us. Uh, this will be, uh, posted on the website in a recorded fashion so you can also rewatch it if you feel so inclined or share it with your colleagues.

[00:57:27] So thank you all so much and we hope you have a great rest of your week. Take care everyone.