

Making the Case to Funders to Invest in Volunteer Engagement

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By

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The following article includes excerpts and adaptations from materials available at no cost through [The Leighty Foundation's "Why Invest in Volunteer Engagement?"](#) [4] website.

Last year, when conducting a site visit with a new client, I heard about a conversation between the Community/Education Director and her colleague, the Development Director. The Community/Education Director, who was responsible for volunteer engagement, had approached her colleague to explore securing funding to support volunteer engagement. The Development Director responded by saying, "Funders aren't interested in supporting volunteer engagement." When pressed to explain how he knew that funders weren't interested, the Development Director said that he had "asked our funders to support volunteer engagement and they all had declined."

Immediately, the Community/Education Director and I saw the problem with this reasoning: The Development Director had asked only the organization's *existing* donors. Of course, those sources weren't interested in funding volunteer engagement; they were already committed to financially supporting the organization's work in areas that spoke to their funding priorities, business objectives, or personal passions.

On the surface, we saw the problem as one of asking the wrong people. What about the funders who were *not yet* supporting this phenomenal organization but who could be tapped to support the organization's work by new investment in volunteer and community engagement? Until that point, this institution was missing the opportunity to reach new funders by offering the opportunity to invest in this vital, under-resourced element of welcoming community involvement.

This situation demonstrates a problem that goes even deeper than simply missed opportunities. The real problem is that organizational leaders—and volunteer engagement professionals as well—are not as comfortable or skilled in making the case to funders about the benefits of investing in volunteer engagement. In fact, most organizational leaders do not view volunteer engagement as fundable and

so don't even consider crafting an "ask" of potential funders. Funding for volunteer engagement is the exception rather than the rule. However, we are beginning to see some glimmers of change. In fact, quite recently we experienced a bright, shining ray of change that occurred at a landmark gathering of volunteer engagement and philanthropic leaders.

Funders and Volunteer Engagement Professionals Sit Down Together

In July 2017, just after this issue of *e-Volunteerism* launched, the first National Summit on Volunteer Engagement Leadership took place in St. Paul, Minn. Hosted by the Minnesota Association for Volunteer Administration (MAVA) in cooperation with a planning team of national volunteer engagement leaders, the Summit was designed to "advance participants' knowledge and skills while helping to discover how, together, we can build a new national presence for leaders of volunteer engagement, tackle the issues that affect our work, and ultimately improve our community impact." More than 500 people attended this momentous gathering, participating in more than 100 sessions that included skills-building workshops and strategy sessions focused on key issues facing the field. (The final report of the Summit is [available online](#) [5].)

Among the many notable aspects of this gathering was a track of sessions designed specifically *for funders*. Invitations were sent specifically to representatives of community, family, and national foundations, and roughly 10 participated. In anticipation of the Summit and the funders' sessions, we worked closely with the Leighty Foundation to publish an important new [Funder's Guide to Investing in Volunteer Engagement](#) [6], which was distributed in printed form to every Summit participant and continues to be available at no cost online. It offers a framework for how funders and organizations can collaborate on supporting volunteering leadership.



The special funder track began with a session designed for funders to meet with each other, and shortly progressed to include leaders in service and volunteer involvement already attending the Summit. Together, we set out to discuss the links between strategic volunteer engagement and philanthropy. We shared recent research on volunteer engagement and panelists discussed successful models of engagement initiatives that have already been supported by funders.

Throughout the sessions, we repeatedly asked the following questions:

- *To funders*: "How can you imagine using this information to assist in making grants more impactful?"
- *To nonprofit leaders*: "How can you apply this information when building a case to funders to invest in volunteer engagement?"

Among the many takeaways were two key points. First, we all agreed on the need to more *intentionally link volunteerism and philanthropy*. To that end, we discussed the benefits of reframing the definition of "volunteerism" to integrate it with the vocabulary of "philanthropy." As I discuss below, the giving of dollars and the giving of time are integrally linked in practice—and organizations would benefit by integrally linking them in definition as well.

Second, we acknowledged that we, as a group, share the view that *volunteer engagement is fundamental to the health of an organization*. The more that an organization can share this perspective through data, stories, and compelling case-making to potential funders, the more success it will have in convincing funders to invest in volunteer engagement.

Common Challenges

As noted, obtaining funding for volunteer engagement is the exception rather than the rule. Volunteers are not only mostly absent from the radar screen of funders, they are rarely on the agenda of nonprofit leaders themselves. Both sides have long-held myths about volunteer engagement. For example, in 2009, The Volunteer Impact Fund supported research by The RGK Center for Philanthropy and Community Service to convene focus groups in Denver, Colo., and Austin, Texas to explore the relationship between leadership and volunteer engagement strategies. Through the research, several common misconceptions emerged:¹

- *Volunteers are free.*
- *You can't invest in voluntary efforts.*
- *Volunteers want only what you want.*
- *Meeting volunteers halfway is a recipe for trouble.*
- *Volunteer "work" is what staff doesn't want to do.*

Particularly relevant to building the case to fund volunteer engagement are the first two myths on this list. The ideas that volunteers are free and that one can't invest in voluntary efforts are significant hurdles standing in the way of agency leaders considering volunteer engagement as worthy of seeking funding.

Those myths are still relevant today—as are the many others that challenge the field in gaining financial support for volunteer engagement. The list includes:

- **Volunteer engagement isn't seen as a priority.** All too often, executive board and staff members are not truly committed to allocating or generating funds to support volunteer engagement; no staff person is responsible for raising funds to support volunteer engagement; and no staff person can articulate the case for supporting volunteers to potential funders. As a result, organizations do not offer volunteer engagement as a priority area worthy of funding.
- **Staff members are resistant to engaging volunteers more meaningfully and that reluctance affects funder attitudes.** Staff members often fear being replaced by volunteers, lack trust that volunteers can do the work, or lack the skills to effectively engage and support volunteers. In turn, funders don't view volunteer engagement as a viable strategy to build organizational capacity.
- **Volunteer engagement is considered a "program" to serve volunteers rather than a strategy to achieve mission.** When viewed as a program, volunteer engagement can be considered in competition for funding with other programs. When volunteers are viewed as an audience, rather than as partners in mission fulfillment, then funders don't view volunteer engagement as a core strategy that can increase their return on investment. This issue is exacerbated by the ongoing practice of measuring volunteer impact simply by counting hours. When volunteer contributions are only valued in terms of the hours (or dollar value thereof),



Kick off session from Funder Track at the National Summit.
From left to right:
Beth Steinhorn, JFFixer Group; Betty Stallings, Consultant; Gregg Baldwin, VolunteerMatch; Kristen Campbell, Philanthropy for Active Civic Engagement, and Lois Savage, Lodestar Foundation.

organizations miss the chance to tie volunteer involvement to the impact on the organization's beneficiaries and mission.

- **Leaders lack an understanding of how volunteering and giving are connected.**

Volunteers are more likely to donate to the organizations where they volunteer. Rarely is the correlation between volunteering and financial giving communicated to funders, and therefore funders miss the chance to “multiply” their investment by supporting volunteer engagement which often increases fundraising.

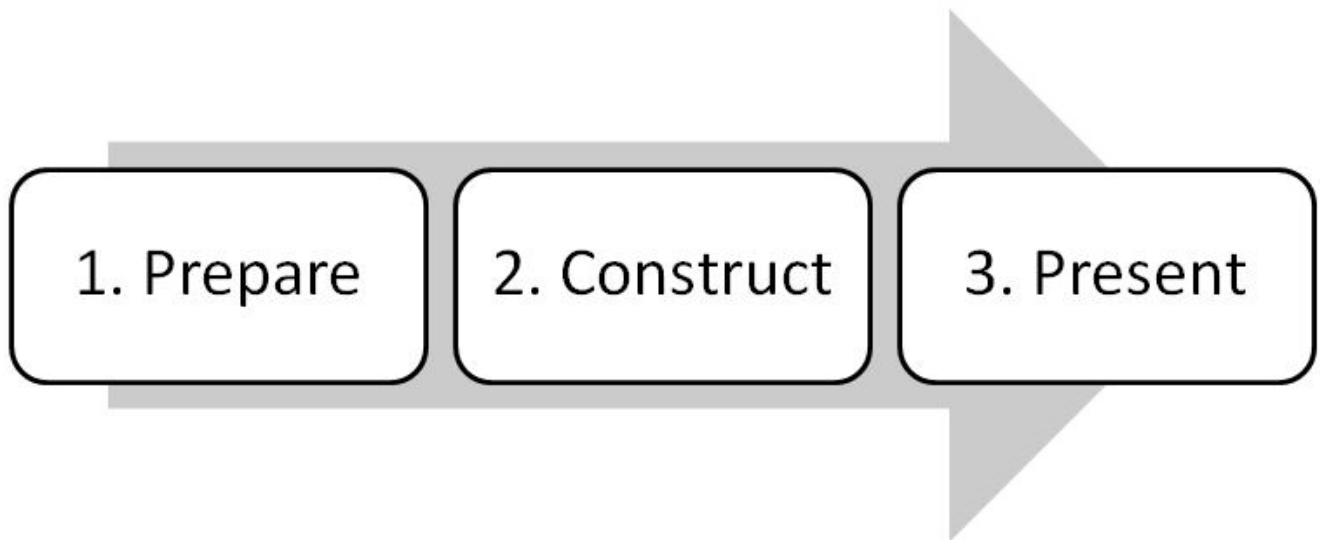
- **The term “volunteer” can be misleading.** For many, the term evokes the idea of “free help,” thereby compromising requests for resources. Why should a funder support something that is “free”?

When building a case to encourage funders to invest in volunteer engagement, it is vital to acknowledge the existing myths and misconceptions, then become familiar with the research that can effectively debunk these myths.

While leaders of nonprofit and public sector organizations have grown accustomed to seeing their roles defined in terms of leveraging tight resources, maximizing community engagement, and advancing organizational growth and development, too few have made the connection between those goals and creating an effective system for volunteer engagement. Furthermore, misconceptions about volunteer engagement abound.

Sarah Jane Rehnberg, *Strategic Volunteer Engagement*

Three Steps to Make the Case to Funders



Step One - Prepare

As with most things in life, thorough preparation is vital. Preparation involves knowing yourself as an organization and knowing the research.

Know Yourself

Assessing your own capacity to engage volunteers and how well your organization stacks up against best practices in engagement is important. Conducting such an assessment will help you answer these and other important questions:

- What are your current volunteer engagement strengths?
- How are volunteers already increasing your impact?
- Where do you have opportunities to enhance your engagement efforts?
- What steps can you take and where would you benefit from investing in volunteer engagement infrastructure, practice, and more?

JFFixler Group offers a free "[Assessment of Volunteer Engagement \[7\]](#)" to download from its site (also available for download from the Leighty Foundation), and many other assessments are available through universities, consultants, and Points of Light's Service Enterprise Initiative. Conducting an internal assessment of volunteer engagement will help identify areas where you may want to seek funding as well as provide information for your case statement about strong practices that you would like to expand and that can serve as evidence that you have a history of stewarding resources well.

Know the Research

Once you have taken the time to reflect and assess your own practice, you will be in a better position to explore what research demonstrates about the value and benefits of a strong volunteer engagement model. Over the past decade, new research has revealed compelling ties between volunteer engagement and the health of an organization as well as between volunteerism and philanthropy. Both are vital messages to share with organizational leadership and with potential (and current!) funders.

In 2009, Reimagining Service, a national multi-sector coalition dedicated to better understanding and

promoting the power of volunteer engagement, conducted research on the state of engagement in the country. Through this research, the correlation between organizational health and sustainability and effective engagement of volunteers became clear.

Working with the research firm TCC Group, Reimagining Service mined data that had been collected through TCC Group's Core Capacity Assessment Tool (CCAT). The CCAT is an online survey that measures a nonprofit's effectiveness in relation to four core capacities—leadership, adaptability, management, and technical capacities—as well as organizational culture.

The researchers discovered five critical pieces of information about the organizations that had a strong volunteer management model:²

1. All organizational capacities are **significantly and markedly stronger** for nonprofits with a strong volunteer management model.
2. When organizations **engage and manage any number of volunteers well**, they are significantly better led and managed.
3. Such organizations not only lead and manage better, they are significantly more **adaptable, sustainable, and capable of going to scale**.
4. Having a strong volunteer engagement strategy requires strong and well-developed **human resources management practices**.
5. Organizations that engage volunteers are equally as effective as their peers without volunteers, but at **almost half the median budget**.

Nonprofits that deploy volunteers on an annual basis *and* have a strong volunteer management model **outperform their peers on all organizational capacities**. That difference is both statistically significant (i.e., unlikely that it occurred by chance) and markedly stronger.³

In response to this and other research, Reimagining Service developed a training model to help organizations embrace best practices in volunteer management and, more importantly, make volunteer engagement a core organizational strategy for mission fulfillment. Those organizations that successfully embrace the model can then be certified as a "Service Enterprise." Since the model was piloted in 2011 and later expanded nationally and managed by Points of Light, more than 200 organizations have been certified as [Service Enterprises](#) [8].

Each year, Points of Light gathers data from the certified Service Enterprises. Last year's Impact Report (shared with volunteer centers and foundations that serve as hubs for service enterprise training and certification) shows that an average certified Service Enterprise received:⁴

- 23% increase in volunteers annually
- 2,700 more hours of donated time from the new volunteers, equivalent to 1.5 FTEs worth of labor
- \$63K in valued labor from the additional volunteer hours

Even more impressive than the increase in volunteers and contributed hours is the increase in impact that so many certified organizations experience. For example, one animal rescue group, Taysia Blue Rescue—which focuses on rescuing Alaskan Malamutes and Siberian Huskies—reported being able to rescue and save 63% more dogs due to its increased capacity through more strategic engagement of volunteers. Jessica Henry, Executive Director of Allen County SPCA, described how important a strong volunteer engagement strategy has been to increasing its ability to fulfill mission:

Service Enterprise has enabled us to go from good to great. Our organization has seen a 500% increase in intake and adoptions over the past four years. That rapid growth...could only be

successful with a well-planned and executed volunteer strategy.

Research conducted by TCC Group and Deloitte demonstrates that nonprofits operating as Service Enterprises outperform peer organizations on all measures of organizational capacity thereby allowing these nonprofits to more effectively address community needs and operate at **almost half the median budget.**

Data from Service Enterprise, as well as the many other initiatives that improve volunteer engagement practices, reveal important messages to help broaden nonprofit and foundation leaders' perspectives about volunteer engagement, particularly in regard to the vital link between volunteer engagement and organizational impact. Just as important—and equally eye-opening—is the data around the link between volunteerism and philanthropy.

Research by organizations including Fidelity Charitable Trust and U.S. Trust with IUPUI Lilly Family School of Philanthropy also shows how integrally linked contributing money and contributing time are:

- **Volunteers are more likely to donate and donors are more likely to volunteer.** Specifically, in 2013-2015, volunteers were nearly twice as likely to donate to charity as non-volunteers.⁵ Meanwhile, in 2015, high-net worth donors volunteered at nearly twice the rate as those in the general population.⁶
- **Volunteers donate more.** According to 2009 research, volunteers give, on average, 10 times as much as non-volunteers,⁷ and 2015 research reveals that high net worth individuals who volunteer give, on average, more than 1.5 times as much as non-volunteers.⁸
- **Donors give financially to the places where they volunteer.** Nearly 70% of high net worth donors give financially to all or some of the organizations where they volunteer.⁹
- **Volunteering is even more fulfilling than financial giving.** Among high net worth donors, volunteering time was rated as “very” or “completely” fulfilling by significantly more people than was giving financially.¹⁰

Investing in Volunteer Engagement has a Big ROI

Investing in robust and strategic volunteer engagement infrastructure pays off significantly. Organizations certified as Service Enterprises have reported a \$6 return in volunteer value for every dollar invested in volunteer engagement.¹¹

Step Two - Construct a Case Statement

After familiarizing yourself with the research, you are ready to begin crafting your case statement. Case statements communicate the rationale, need, focus, and vision of what will be different because of an initiative for which you are seeking support—financial and otherwise. It can be used to develop speaking points, print materials, and proposals to share with prospective funders.

Key Questions to Consider

The following questions—adapted from *Leading the Way to Successful Volunteer Involvement: Practical Tools for Busy Executives* by Betty Stallings and Susan J. Ellis¹²—will help you develop your case statement.

1. What problem or need does your organization work to resolve or address?
2. Who or what is affected by this challenge?
3. How can volunteer involvement help to address the problem? What skills or talents would build your capacity to address these challenges?
4. How are you already engaging volunteers to address some of these needs?
5. How are volunteers already making an impact on this issue? What are the specific benefits of engaging volunteers in increased or different ways? Impacts and benefits could include increased public awareness, more people served, better services being delivered, dollars raised through fundraising, new skills within the organization, stronger staff, and more.
6. How is your organization unique in addressing the problem? How is your organization unique in the ways it engages the community as partners in addressing these challenges?
7. What is the desired outcome of this increased effort? What difference will new or more volunteers be able to make? (For example: How many people will you reach? How many programs will be delivered? How will the clients benefit? How much funds will you raise?)
8. What will it cost to reach the desired outcome? Consider budget for both cash expenses and donated resources, whether people, funds, or in-kind services.
9. Which donor(s) or funder(s) will you ask for support and why? Are they funders that already have interest in volunteer engagement or capacity building initiatives? How will each prospective donor or funder benefit from giving you support?

The answers to these questions will provide you with all the information you need to develop a compelling case statement.

Step Three - Present Your Case

When presenting your case, be specific about your vision, your strengths, and your needs to help you accomplish your vision. Also, plan how you can respond to objections or concerns of potential donors.

Be Specific!

There are two essential rules when constructing a case statement to request financial support for volunteer involvement.¹³

1. **DON'T approach funders with a budget to support the infrastructure of running a volunteer program.** Infrastructure supports your organization, not your clients. Focusing on the internal needs is the biggest mistake in fundraising. Speaking of a “volunteer program” isolates community participation into a special project, possibly viewed in competition with more client-centered “programs.”

- An Ineffective Ask:

We need money to fund the position of a volunteer coordinator so that the program runs more smoothly and efficiently and our volunteers have a more organized and successful experience.

- Probable Funder Response:

How are you different than any other organization that would like a volunteer coordinator? What difference would it make in carrying out your mission?

2. DO request funding that will empower volunteers to expand the reach of your mission. Whatever your mission—ending hunger, improving the environment, enabling seniors to live independently—it is that goal with which funders will want to be identified and which they will likely support.

- An Effective Ask:

Divorce, alcoholism, drug abuse, and depression are frequently associated with those who care for seriously ill children. We are seeking funds to extend our support to approximately 1,300 families in our region who care for a child with a serious illness. Expanding the number of community volunteers (more targeted recruitment) and strengthening their skills (formal training) to provide respite services will allow us to increase and enhance our overall service to these families.

- Probable Funder Response:

We share your interest in extending assistance to additional families with a seriously ill child and will consider your request of maximizing the support through service provided by an increased number of effectively trained volunteers.

For additional information on making your case, see Betty Stallings' *e-Volunteerism* article, "[Generating Funds for Your Volunteer Program: The Mindset and Methods](#) [9]."

Preparing for Objections¹⁴

You may need to educate a prospective funder about the value of volunteers and their abilities. Therefore, before you make your funding request, consider all the objections, or at least concerns, a donor or funder might have when deciding whether to give you money. Then, prepare your responses.

For example:

- Donor Objection:

My experience is that volunteers are not reliable and you might find yourself investing more in them than they return in service to the organization.

- Potential Response:

I am sorry that you have had that experience with volunteers. In our organization, we do a very thorough job of selecting the right volunteers for positions available, holding volunteers accountable, and treating them as partners in our important mission. We have had remarkable success with volunteers carrying out the commitment they pledge to us.

What are the potential objections to your request for funds to support your engagement of volunteers? How will you respond?

Sustaining the Work

Volunteers today are motivated by the chance to do meaningful work that makes a difference. Of course, measuring volunteer impact is not only valuable for volunteers. Understanding the impact of volunteer involvement can help improve programs, build staff buy-in for their engagement efforts, and communicate to funders, donors, and the larger community how the organization is stewarding its resources overall.

Most organizations continue to measure volunteer contributions simply by counting the number of hours volunteers contribute. Acknowledging the dedication and commitment of volunteers can be

valuable. But counting hours is limiting, at best. More hours do not necessarily translate to more impact, nor does counting hours promote efficiency. While hours may need to be tracked for grant reporting, there is value in getting beyond hours alone.

While there are many ways to discuss the value of volunteer contributions, one approach that speaks to funders is to translate volunteer hours to monetary figures (largely representing what the same services would cost if paid for in wages). Resources are available to help you do this, such as the [annual value of volunteer time published by the Independent Sector](#) [10] or the U.S. Bureau of Labor Statistics' information on comparable hourly values for related paid positions. Similar estimates can be found in other countries. This journal has published many articles on the monetary value of volunteer time, all still available [in the archives](#) [11].

Calculate your Return on Volunteer Investment (ROVI) by considering not only the value of the volunteer talent but also the amount of time and money that the organization invests in recruiting, training, supporting, supervising, and recognizing volunteers. And, most importantly, track the outcomes of volunteer involvement by focusing on the difference that volunteers make in such terms as people reached, trees planted, books distributed, improved school performance by students being tutored, health screenings conducted, legislation passed, and more. Measuring outcomes in these terms really tells the story of the vital roles that volunteers play in an organization and in the community and can truly be the tipping point in garnering funder support.

Put the Steps into Action

As we saw in St. Paul at the National Summit on Volunteer Engagement Leadership, funders' eyes are opening to the power and potential of investing in volunteer engagement. Once we all sat around the same tables, sharing data and discussing successful models when funders have invested in engagement initiatives, we were able to speak the same language and reach common understandings. While some funders came to the conference *because* they had a history of investing in volunteer engagement, others came simply because they were invited. Admittedly, at first, they didn't fully embrace the idea that volunteer engagement had a role to play in their funding priorities. But, after two days of dialogue, they realized how vital volunteer engagement is to the success of the organizations they fund through their current funding priorities. Nonprofit leaders and volunteer directors, meanwhile, learned what motivates certain funders and how to better articulate the connections between volunteer engagement and healthy, impactful organizations.

What happened in St. Paul can happen in your community as well; it doesn't take a national conference to get funders around the table with organizational leaders. Start by sharing these steps with other leaders at your organization (board members, executive leadership, and development staff). Use the new [Funder's Guide](#) [6] to fuel the conversation and, together, follow the steps outlined above (and expanded upon the Leighty Foundation's online [Guide for Nonprofits](#) [12]) in order to get around the table with funders in your community. As a funder herself, Jane Leighty Justis has noted:

As funders, we must recognize that volunteer engagement is not a "program" in itself, but a cost effective strategy to assist all organizations and community groups in accomplishing their diverse missions. The need is urgent, the timing is critical, and the support is necessary.

Funders won't make this leap of recognition unless you invite them to the table and start the dialogue. There is no better time to start than *now*.

¹ The RGK Center for Philanthropy and Community Service at the LBJ School of Public Affairs at The University of Texas at Austin. *Strategic Volunteer Engagement: A Guide for Nonprofit and Public Sector Leaders*. <http://www.volunteeralive.org/docs/Strategic%20Volunteer%20Engagement.pdf> [13]

² TCC Group, "'Positive Deviants' in Volunteerism and Service: Research Summary," <http://www.pointsoflight.org/service-enterprise-initiative/research> [14].

³ Ibid.

⁴Points of Light, "2016 Service Enterprise Impact Report"

⁵Corporation for National & Community Service, "Volunteering and Civic Life in America" <https://www.nationalservice.gov/vcla> [15].

⁶U.S. Trust and IUPUI Lilly Family School of Philanthropy, "The 2016 U.S. Trust Study of High Net Worth Philanthropy" www.ustrust.com/philanthropy [16]

⁷ Fidelity Charitable, "Fidelity® Charitable Gift Fund Volunteerism and Charitable Giving in 2009 Executive Summary" <https://www.fidelitycharitable.org/docs/Volunteerism-Charitable-Giving-2009-Executive-Summary.pdf> [17]

⁸U.S.Trust and IUPUI Lilly Family School of Philanthropy.

⁹ Ibid.

¹⁰ Ibid.

¹¹ Points of Light, "Where Should Nonprofits Use Volunteers? Everywhere." <http://www.pointsoflight.org/blog/2013/10/22/where-should-nonprofits-use-volunteers-everywhere> [18].

¹² Adapted with permission from Betty B. Stallings with Susan J. Ellis, *Leading the Way to Successful Volunteer Involvement: Practical Tools for Busy Executives*, Energize, Inc.,2010.

¹³Ibid.

¹⁴ Ibid.

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