

THE LEIGHTY FOUNDATION

Ensuring a Legacy in Volunteer Engagement

REPORT TO THOUGHT-LEADERS: What We Learned

Jeff Glebocki and Betsy McFarland for The Leighty Foundation
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[The Leighty Foundation's](#) vision is that Volunteer Engagement will become a standard principle and best practice in the social sector embraced by nonprofits and funders alike. The foundation launched an investigative process in August 2020 to learn how the philanthropic sector might shape and initiate a strategy to realize this vision for the future of Volunteer Engagement. We conducted interviews with 17 national thought-leaders in the field, and online research into field- and movement building, effective framing and messaging, and strategy development.

THOUGHT-LEADER INSIGHTS:

1. All agree strategic Volunteer Engagement is important; express a desire to be informed about what the foundation learns; and many offered to lend assistance in the future.
2. A two-pronged approach is needed to elevate the importance of Volunteer Engagement – drive the demand by reaching nonprofit leaders and raise funder awareness and commitment to meet that demand.
3. There is insufficient infrastructure to properly evaluate and support Volunteer Engagement. Nonprofit leaders and funders lack awareness of available tools to properly evaluate and support Volunteer Engagement.
4. It is critical to develop a shared definition of Volunteer Engagement in the social sector, and how it fits in relation to civic engagement and organizational capacity building. We've already begun to focus and test our language in the thought-leader interviews. Finalizing a shared definition will help shape effective and persuasive messaging and narrative to engage a wider audience.
5. New research is called for to demonstrate the value of volunteer engagement as a core strategy and integral part of organizations and their mission-fulfillment. Several thought-leaders express interest in partnering with the foundation to establish a data-supported baseline to measure progress.
6. The most effective approach to elevate Volunteer Engagement is to facilitate a collaborative partnership of leading voices and organizations from foundations, corporate philanthropy, the public sector and nonprofits—and not to initiate a new entity. [The National Alliance for Volunteer Engagement](#) will remain an important partner in furthering nonprofit support, and the foundation has the opportunity to significantly increase support from funders. Thought-leaders note that successful partnerships require a “backbone organization” function, and that the foundation be prepared to underwrite it.
7. There are cross-sectoral strategies in successful field- and movement building to inform the foundation's efforts going forward. These include developing clear definitions; articulating principles and benchmarks, and providing useable data and research; providing easy-to-use and easy-to-understand guidance in implementation; identifying key leaders and early adopters; and coordinating promotion, advocacy and marketing of the idea.

8. Most interview respondents encourage the foundation to act now on this effort given the dramatic needs in communities, the increased demands on nonprofits, and the pressure on funders to respond to multiple large-scale disruptions. The foundation should think of the “long game” and engage other, larger funders to leverage additional financial resource and influence.

RESEARCH INSIGHTS:

9. There are numerous exemplars of how the above-mentioned strategies have been successfully used by funders, nonprofits and various partnerships to advance or elevate their priority issues. These range in scale from efforts led by collaboratives of small and larger funders ([Sustained Collaboration Network](#)) to initiatives by large national foundations ([The Rockefeller Foundation’s campaign](#) to promote impact investing to philanthropy).

PROPOSED NEXT STEPS: The foundation’s action steps in moving forward are outlined on Page 9.

Jeffrey M. Glebocki
www.strategyplusaction.com

Betsy McFarland
www.adisagroup.com

The Leighty Foundation's Vision

[The Leighty Foundation](#) has a 30-year legacy of investing heavily in strengthening the sustainability and resiliency of organizations through the strategic deployment of volunteers. The foundation's strategy has grown from giving individual capacity building grants to leading national efforts to inspire funders to partner with nonprofit organizations in innovative and strategic ways to involve volunteers in driving mission impact.

The foundation envisions a future where Volunteer Engagement will be incorporated as a fundamental best practice in the social sector. Nonprofit organizations and those who support them—foundations, corporations, government and individual donors—will embrace Volunteer Engagement as a strategic imperative in fulfilling their missions. It will become a standard principle and practice expected by nonprofits and funders alike.

Project Objective

In August and September 2020, The Leighty Foundation launched an investigative process to learn how the philanthropic sector might shape and initiate a strategy to realize this vision for the future of Volunteer Engagement. We engaged 17 key thought-leaders in the field through confidential interviews as part of this two-part process; and we conducted online research into field- and movement-building, effective framing and messaging, and strategy development. See Addendum 1 for list of participants.

The Foundation made two commitments at the beginning of the investigative process:

1. To share its learning from this exploration with the nonprofit and philanthropic sectors. This report is the first step in broadening the field's knowledge.
2. To dedicate financial and human resources for up to a two-year period to support a strategy it has identified that has the most likelihood for success. From now through August 2021, we will be partnering with the foundation to create a strategy and set of actions that will serve as a capstone in culminating the foundation's thirty-year initiative and ensuring its legacy in Volunteer Engagement (see Proposed Next Steps).

The following pages summarize the highlights of the data and insights this initial learning process has identified and outlines the foundation's next steps in its journey over the next year.

Thought-Leader Insights

- Without exception, all thought-leaders interviewed agree that strategic Volunteer Engagement is important—particularly given the disruptions brought about by current events and the urgent need for community involvement in addressing social issues—and

that the foundation’s vision is worthy of pursuit. At a minimum, all thought-leaders express a desire to be kept informed about what the foundation’s investigative phase surfaces; and many offered to make themselves available to advance the foundation’s endeavor.

- While all acknowledge the importance of Volunteer Engagement, it is also clear that much work remains to be done to elevate the subject. This is not an issue many funders recognize as needing support, as they do not receive requests for support for Volunteer Engagement from their grantees and they don’t want to be prescriptive of grantees. Clearly, there remains a gap in understanding of nonprofit leadership of the need to support volunteer infrastructure. A two-pronged approach is required to reach both nonprofit leaders (drive the demand) and funders (raise awareness and commitment to meet the demand).
- Nonprofit leaders and funders lack awareness of the tools to properly evaluate and support Volunteer Engagement—such as [The Leighty Foundation guides](#). While they feel it’s important, there is a gap between thinking it is essential and actually making the investment in infrastructure necessary to strategically engage volunteers. This is not surprising as most infrastructure-building ends up low on the list of priorities. But there are efforts underway to address infrastructure needs and the Volunteer Engagement component can be part of this growing effort.
- Our interviews and online research point to the critical need to develop a shared definition of Volunteer Engagement in the social sector, and to articulate how Volunteer Engagement fits (and is perceived to fit) relative to the related topics of civic engagement and organizational capacity building.

There are several definitional threads that require consideration in how best to position strategic Volunteer Engagement. The most important question to ask: *Is Volunteer Engagement the mission in and of itself or is it a means to an end to meet community needs, build organizational sustainability and produce outcomes and impact, including systems change?*

Recognizing the spectrum of volunteerism, does Volunteer Engagement include both structured and informal Volunteer Engagement? How do we frame loosely organized community involvement, and skills-based and /pro-bono volunteering? And how do we recognize differing access and interests based on organizational needs, generations, race, income and community make-up?

Building a common agreement on what Volunteer Engagement is – and is not – provides context for the next step of shaping effective and persuasive messaging and narrative to further engage both nonprofits and funders. *Demonstrate the scope and depth of volunteer engagement, how does it work, what is the “theory of change” embedded in strategic Volunteer Engagement? Provide proof-points on the “how” and “why” it works. What are the motivating factors to invest in Volunteer Engagement? How to evaluate Volunteer Engagement in organizations? Make it easy for people and organizations to understand and to use – “plug and play.”*

- It is recommended that a broader body of knowledge is needed to advance this effort, not just anecdotal or case studies. New research is called for to demonstrate the value of volunteers as a core strategy and integral part of an organization and its mission-fulfillment: *How do nonprofit leaders view and support Volunteer Engagement in terms of its importance? What is the return-on-investment from strategic Volunteer Engagement? Why are the national rates of volunteerism (and small-donors) going down? What is the future of strategic Volunteer Engagement given generational and economic shifts? How are fundamental changes in the workplace, and employer responses to those changes, affecting Volunteer Engagement?*

A few key thought-leaders express interest in partnering with The Leighty Foundation to conduct necessary research on the state of Volunteer Engagement in nonprofits nationally in order to establish a data-supported baseline from which to measure progress.

- There is also interest in partnering on a study of the role of volunteers during the COVID-19 crisis to use as a strategy to elevate the conversation about the importance of volunteers.
- Thought-leaders concur the most effective approach to elevate Volunteer Engagement is to facilitate a collaborative partnership of leading voices and organizations from foundations, corporate philanthropy, the public sector and nonprofits, and not to initiate a new entity. They highlight the importance and evolving nature of how corporations are engaging employees in substantive volunteerism; as well as the broad scope and impact the public sector has on volunteer service. Respondents suggest a list of potential partners for this collaborative effort as noted in Addendum #2, and a list of actions the foundation could take in supporting such a partnership, shown in Addendum #3.

Respondents advise that such a partnership be non-partisan to ensure the highest level of receptivity to the message and the work. Several thought-leaders encourage the foundation to prioritize those partners focused on systems and culture change and who would understand how Volunteer Engagement can facilitate that. More specifically, they ask if and how the foundation might align its efforts alongside philanthropy's recent several billion-dollar grantmaking around racial justice, and how this would likely attract greater visibility and interest in the field.

[The National Alliance for Volunteer Engagement](#) will remain an important partner in this work, particularly in furthering nonprofit support while The Leighty Foundation has an opportunity to significantly increase support from the funding community. Respondents also note that successful partnerships require a "backbone organization" function, and that the foundation be prepared to underwrite it. This could take the form of an existing organization, contractors or some hybrid to coordinate partnership activities.

- There are a few key funders who have embraced the importance of modeling volunteerism as a core strategy and are investing in Volunteer Engagement infrastructure. As an example, the UJA Federation of New York (United Jewish Appeal) distributes over \$140 million in grants annually and recently evolved their grant making to include a specific

request for grantees to describe how they are engaging volunteers in meeting the need of the organizations they serve and they overtly invite grantees to request funding to support it.

- There are cross-sectoral strategies in successful field- and movement-building which should inform the foundation’s efforts going forward.
 - Developing clear definitions
 - Articulating principles and benchmarks, and providing usable data and research
 - Building capacity by providing easy-to-use and easy-to-understand guidance in application or implementation
 - Identifying leadership that can bring others along, and recruiting early adopters to serve as role models in practice
 - Coordinating promotion, advocacy and marketing of the idea
- Considering the national state of disruption, respondents offered cogent arguments on whether the foundation should proceed with this initiative now or use the coming months for further planning. Most encourage the foundation to act now given the dramatic needs in communities, the increased demands on nonprofits, and the pressure on funders to respond to multiple large-scale disruptions. Several thought-leaders urge the foundation to think of the “long game” going forward, and to engage other, larger funders to leverage additional financial resource and influence. In short, the guiding message is that strategic Volunteer Engagement is important, and it will take several years to develop roots to embed it as a common best practice. As a result, the Foundation will be critical in positioning the effort to live beyond the foundation’s investment.

Research Insights

There are numerous exemplars of how the above-mentioned fundamental strategies have been utilized successfully by funders, nonprofits and various partnerships to advance or elevate their priority issues. It is clear from these examples below that the most effective and impactful path forward is to build collaboration and momentum among groups of funders around Volunteer Engagement to elevate the issue.

- [The Sustained Collaboration Network](#) which is a network of nonprofit funders and intermediaries dedicated to making nonprofits more efficient, effective, and sustainable through sustained collaboration.
- [The Interfaith Census 2020 Coalition](#) which was a partnership between city government and New York City faith leaders and communities to increase participation in this year’s census in historically undercounted communities.
- [The 5-year Equitable Evaluation Initiative](#) is a collaboration of funders and partners that seeks to shift the evaluation paradigm so that it becomes a tool for and of equity for those that have placed equity as core to their work.

- [Trust-based Philanthropy](#) is a movement in philanthropic best-practice designed and launched by a small-funder, The Whitman Institute. This spend-down foundation has successfully packaged, promoted and elevated the importance of trust in grantmaker/grantee relationships.
- [Impact Investing](#), while not a new concept, was shaped by a group of national funders to educate foundations on how to extend the influence of their resources. This effort also provides guidance on how to incorporate and measure impact investing in practice.

A group of institutions led by the Rockefeller Foundation set out to achieve the ambitious goal of inventing ways to increase the private capital being used to address the world's societal challenges. However, the infrastructure was lacking for the group to find its voice and take action together, and it was not clear how this small group could turn into a meaningful industry when it lacked the infrastructure that existed in mainstream finance. Deloitte Monitor Institute supported the Rockefeller Foundation as it brought together a collection of unusual collaborators, including traditional investors, early impact investors, foundations, and entrepreneurs who shared an interest in scaling up this nascent set of practices. Together these collaborators formed a new community committed to sharing leading practices through sustained dialogue and reports such as Investing for social & environmental impact—including a new nonprofit, the Global Impact Investing Network. The report and the nonprofit together are now widely credited with catalyzing significant new private capital to support the burgeoning field of impact investing, a \$77+ billion marketplace.

- [Fund for Shared Insight](#) is a national funder collaborative working to improve philanthropy by elevating the voices of those least heard. Their initiative, Listen4Good, promotes feedback as a complement to monitoring and evaluation with the goal of helping nonprofits and foundations be more responsive to the needs, preferences, and opinions of the people and communities they seek to benefit. Core funders commit a minimum of \$250,000/year and include the William + Flora Hewlett Foundation, the David and Lucile Packard Foundation, W.K. Kellogg Foundation, and the Bill & Melinda Gates Foundation.
- [Philanthropy Together](#) is a new national initiative, co-created by hundreds of giving circle and network leaders, to scale and strengthen the movement to more than 3000 circles and 350,000 people. They aim to showcase the model of collective giving, scale the number of circles and the number of people involved, and strengthen and sustain the work of existing giving circles and associated networks.

Next Steps

Over the next 11 months, The Leighty Foundation will use this roadmap to better understand the landscape, build alliances and test new approaches; and to formulate the foundation's actions going forward in the following year:

- **Design and implement effort to refine definition of Volunteerism and Volunteer Engagement.** Engage key partners through e-focus groups, online surveys and interviews to develop a shared working agreement (and in the process, further build a community and momentum for our effort). Also begin to build out the “value proposition.”
- **Engage potential partners and funding sources.** Sharpen our network by identifying and engaging potential partners – funders, advocates, thought-partners, etc. Develop relationships with such partners as the Generosity Commission and Independent Sector's work on nonprofit infrastructure.
- **Expand the conversation.** Document and share this next stage of learning and action with partners and the field. Develop short, periodic updates, including blogs, interviews, presentations/webinars, and posts for the foundation's website and others where we can reach a wider audience.
- **Build-out initial two-pronged strategy** to advance this body of work. (1) We see the National Alliance as a key partner in this effort to create demand in the nonprofit sector, and the capacity of nonprofits to articulate need to funders. (2) Raise awareness and support by informing funders on the need, research, and value proposition of Volunteer Engagement.
- **Construct options** for what a network/partnership might look like. Use scenario planning to identify champion and leadership cohorts. Outline options for a backbone organization function – what it would do to support the larger venture, what infrastructure is needed, and what resource is required.

Addendum 1: Thought-leader Interviews

Teri Behrens
Executive Director
Johnson Center at Grand Valley State
University

Lucy Bernholz
Consultant, Philanthropy2173
Director, Digital Civil Society at Stanford

David Biedmesderfer
President/CEO
United Philanthropy Forum

Melinda Bostwick
Vice President, Member Services
Association of Corporate Citizenship
Professionals (ACCP)

Henry Berman
CEO
Exponent Philanthropy

Paul Masiarchin
Director of Member Services,
Minnesota Council on Foundations

Kristen Cambell
Executive Director
PACE (Philanthropy for Active Civic
Engagement)

Rina Cohen (and Pam Wexler)
Planning Executive
Caring & Network Departments
UJA-Federation of New York

Rob Collier
Former President and CEO
Council of Michigan Foundations

Sarah Gelfand
Vice President, Social Impact Programs
Fidelity Charitable

Gabriel Kasper
Managing Director
Deloitte Monitor Institute

Lois Savage
President
Lodestar Foundation

Nick Tedesco
President and CEO
National Center for Family Philanthropy

Jerome Tennille
Manager, Social Impact & Volunteerism
Marriott International

Yvonne Thomas
Executive Director
Generosity Commission

Jennifer Wei
Organizational Effectiveness Officer, Effective
Philanthropy Group
William and Flora Hewlett Foundation

Marcus Walton
President and CEO
GEO, Grantmakers for Effective Organizations

Addendum 2: Thought-Leader Suggestions for Potential Partners

- All Hands and Hearts
- Association of Corporate Citizenship Professionals (ACCP)
- Blackbaud
- Catchafire
- Center for Effective Philanthropy
- Community foundations
- Conference Board
- Corporation for National and Community Service
- Council on Foundations
- East Bay Community Foundation
- Encore
- Exponent Philanthropy
- Fidelity Charitable
- Ford Foundation
- Generosity Commission
- Google
- Grantmakers for Effective Organizations
- Hewlett Foundation
- Independent Sector
- Indiana University School of Philanthropy (or other institution-based programs)
- Intel
- International Association for Volunteer Effort (IAVE)
- Johnson Center at Grand Valley State University
- Lodestar Foundation
- National Alliance for Volunteer Engagement
- National Center for Family Philanthropy
- National Council of Nonprofits
- Packard Foundation
- PEAK Grantmaking
- Philanthropy Roundtable
- Points of Light
- Regional associations of grantmakers
- Salesforce
- San Francisco Foundation
- Social Venture Partners International
- Taproot Foundation
- United Philanthropy Forum
- Virtual Philanthropy
- VolunteerMatch

Addendum 3: Thought-Leader Suggestions for ways The Leighty Foundation can best apply its financial and human resources to support a collaborative partnership

Leadership

- Provide a “voice” advocating for strategic Volunteer Engagement
- Organize and convene stakeholders
- Facilitate deliberations, planning and action

Funding

- Support core operations of a “backbone” function to coordinate overall strategy
- Incentivize partner and network activities through seed grants, capacity building grants, project grants and general operating grants as appropriate

Knowledge Management

- Provide funding for a “hub” for resources, knowledge, tools
- Fund, co-fund and/or encourage research
- Generate, aggregate, analyze and disseminate data
- Provide access to technical assistance
- Distribute information on relevant issues

Communications

- Fund and coordinate development of messaging, narrative and storytelling
- Provide support for coordinating communications, outreach and engagement

Technology

- Establish website as virtual gathering venue for funders, nonprofits and other stakeholders. Use website to build community and collaboration across geography and sectors. Disseminate knowledge.
- Explore use of other tools to engage people and organizations and expand the reach of this endeavor.