Volunteer Engagement Mobilization Plan
2019-2024
I. Document Overview

II. Introduction

United Way of Dane County’s (UWDC) 2018-2022 Strategic Plan focuses on stabilizing families in Dane County by effectively mobilizing the community with the key outcome measure of collectively reducing poverty. We do this with a two pronged approach: continue to contribute and invest in the most effective programs, while continuing to innovate, and increase education and engagement to inspire the community to get involved. Volunteerism is a strategy in unifying the community and a fundamental building block toward changing lives and achieving our vision of a Dane County where everyone can succeed in school, work and life.

Volunteers help agencies provide the wide range of services that are available in our community; nonprofit agencies and community organizations would not be able to provide the breadth and depth of services they offer if they didn’t involve volunteers.

Volunteers
- Bring fresh perspectives
- Expand diversity (i.e. age, gender, race, ethnicity, religion, socioeconomic status, thought)
- Provide leadership skills and work related experiences
- Help agencies reach new audiences and markets
- Extend staffing capacity
- Serve as ambassadors and advocates for the causes in which they are involved
- Create an environment of people that care about their communities
- Donate money at a higher rate than non-volunteers
- Benefit health wise and professionally

The community calls on UWDC to provide opportunities to volunteer directly through our signature initiatives, connect individuals to opportunities through partner agencies, and provide more tailored corporate engagements.

For example, UWDC spearheads annual volunteering programs such as Seasons of Caring, formerly known as Days of Caring (and formerly known as “Day of Caring” before that), to bring
the community together throughout the year to make greater impacts through volunteerism. This countywide volunteer event began in 1993 with 125 volunteers and has expanded to nearly 3,000 in 2018. In addition, United Way leads volunteer tutoring programs such as Schools of Hope and Achievement Connections for elementary and high school students working toward literacy and math proficiency. Moreover, over 1,000 internal volunteers serve on UWDC Boards, Councils, Committees, Community Solution Teams and many other volunteer groups. They are the backbone of our work and the voice of the community.

VolunteerYourTime.org, the hub for volunteering opportunities through partner agencies, is also a major initiative managed by United Way of Dane County. This website is a four-agency collaboration (UW-Madison Morgridge Center for Public Service, Madison College, formally known as Madison Area Technical College [MATC], and Edgewood College are partners with United Way) which is the local resource for volunteering in Dane County. Currently, the website lists over 300 agencies and over 600 opportunities, on average, allowing ongoing access to volunteer opportunities throughout the community.

With the rise in company-driven corporate social responsibility strategies, larger and more frequent employee engagement opportunities are being requested of UWDC. In 2018 United Way connected with a corporate partner during their national sales meeting to host a “Give Back Day” featuring 9 different projects provided in collaboration with Clean Lakes Alliance, Habitat for Humanity, housing agencies, Meals on Wheels, and Second Harvest Food Bank. In one day over 1,000 employees volunteered their time. Given the increase in interest from our corporate partners, it is imperative that we continue to keep up with the demand for these requests, a main focus of this plan.

The Volunteer Engagement Mobilization Plan lays out strategies and tactics for the next five years that will help us identify community needs for volunteerism, ensure a collaborative link between partner agency opportunities and corporate requests, and create an effective and consistent measurement to share impact and increase awareness.

It is a difficult task to determine a consistent measure to gauge the need in the community, match requests from corporate and community partners, and increase awareness and education by reporting back on impact. However, as one of the premiere volunteerism resources in the community, we have a responsibility to play a leadership role and are excited to take on the challenge and pioneer this work.

**Our goal:** To establish baseline volunteer data and grow quality volunteerism by providing engagements that meet the needs of the requestor as well as the community.
III. Research

Though it is easy to assume that volunteering benefits the community it serves and the individual volunteers, limited and inconsistent data currently exists to inform and validate our approach to volunteer engagement. However, we were able to glean key trends from the following research which has been vetted and can be considered reliable.

A. Individual Value of Volunteering

Decades of research have proven a clear correlation between volunteerism and health and social benefits.¹

Volunteerism and the Impact on Health and Professional Development

As outlined in the infographic above, volunteering has numerous intrinsic benefits ranging from developed friendships, personal independence, skill-building, and creating community cohesion to an overall enriched sense of purpose and satisfaction in life both inside and outside of the walls of one's workplace.²

Next Generation of Volunteerism

While volunteerism has trended slightly lower over the past decade, volunteerism itself has also shifted over the years, especially among younger generations.³ Millennials have been a growth target for many years at UWDC. This was reinforced in 2016 when the UWDC Board approved

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¹ Corporation for National and Community Service (CNCS), Volunteering in America, [https://www.nationalservice.gov/vcl](https://www.nationalservice.gov/vcl)


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strategies outlined by United Way’s Task Force for Transformation work, an effort to explore options to accelerate revenue growth. We know that younger generations have consistently volunteered and that volunteerism leads to giving. However, the way we work has changed along with expectations of volunteerism in the workplace. The next generation of volunteerism has an increased focus on purposeful volunteer opportunities – a more sophisticated system to increase value based on volunteers’ interests and community needs.

**Volunteerism in the Workplace**

- When deciding where to work, **58% consider a company’s social commitments (76% of Millennials).**
- **55% would choose** to work for a socially responsible company, even at a **lower salary** (75% of Millennials).
- **66% wish their employers would provide** volunteer opportunities they could do with friends or family (83% of Millennials).
- **74% say their job is more fulfilling** when they are provided opportunities to make a positive impact on social issues (88% of Millennials).

Volunteerism is on the rise in companies thanks to a growing emphasis on mission based collaboration. The good news is that many companies know and value volunteerism and philanthropy as a way to promote company engagement, loyalty, and retention. Moreover, our work with fundraising shows that there is an increased expectation that companies provide employees with opportunities to give back to the community and many have Corporate Social Responsibilities (CSR) programs and even dedicated staff.

Additional trends in the workplace include **expectations for timing** of volunteerism and **type and focus** of volunteering opportunities.

- **Nearly 84 percent** of respondents said they **expected year-round volunteering in the future**, whereas in a similar 2013 survey, year-round volunteering was not even among the top eight expectations for future engagement programs.
- **70 percent** of respondents **expect future programs to include skills-based volunteering** and nearly the same amount foresee **volunteer release time** for employees.
- **Prioritization of social issues within industries** in most cases are aligned with core competencies and unique demands to that particular sector. For example, regional banks prefer to focus on financial literacy programs where they can provide expertise.

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**Key Insights:**

- *Nonprofit and voluntary organizations, individuals, companies and society as a whole benefit from the impact of volunteerism – there is an opportunity to highlight this among the community*
- *Requests for volunteer opportunities by companies and employees are only going to continue to increase*

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B. National and Local Research
We audited volunteerism data from both a national and local perspective. In general, the national data is more robust, but as a whole there are challenges due to the inconsistencies in the data collected and the information disseminated.

According to a survey, *Volunteering in America*, by the Corporation for National and Community Service (CNCS)\(^6\), the rate of volunteering had been declining slightly over the last 10 years but is on the upward swing again in terms of number of volunteers following the latest report from 2018.

**National Trends**
- 62.6 million Americans (24.9%) of the adult population volunteered in 2015 with 7.9 billion hours of service or $184 billion\(^*\) of service contributed.  
  *calculated by average rate of a volunteer hour $23.29 in 2015*  
- 77.3 million Americans (30.3%) of the adult population volunteered in 2018 with an estimated value of $167 billion.  
- 21% of residents participate in local groups or organizations.  
- 11.6% of residents donate $25 or more to charity
  *calculated by average rate of a volunteer hour $24.69 in 2018*

**How Wisconsin Ranks**
- Wisconsin ranked 12\(^{th}\) at 37.4% in 2018 compared to 3\(^{rd}\) at 35.3% in 2015.  
- 1,718,821 volunteers contributed 164.3 million hours of service in 2018.  
- Volunteer service was valued an estimated $3.9 billion.  
- 35.8% of residents participated in local groups or organizations.  
- 57.1% of residents donated $25 or more to charity.
  *calculated by average rate of a volunteer hour $24.00 in 2018*  
- Madison ranked 3\(^{rd}\) among mid-size cities at 40.4% in 2015. This statistic was not reported since.

**Demographic Trends**
Volunteer age group data was collected from four decades, and in general, the results show\(^7\):
- Volunteer rates tend to rise by age twenty, reach their highest point at ages thirty-five to forty-four, and then begin to decline. The rise in volunteer rates at midlife may be attributed to adults settling into their community, building and strengthening their social networks and career, and interacting with more community institutions after having children.
- Decline in volunteer rates tends to be associated with retirement, diminished physical capabilities, and loss of connections with established social networks. Over the last two decades, however, the decline in volunteer rates after ages thirty-five to forty-four has been less sharp, suggesting that the peak volunteering period now includes a slightly older age group.
- One of the most notable changes in volunteering over the last forty years came from adults ages sixty-five and over. The volunteer rate increased by 64 percent between 1974 and 2005 (from 14.3% to 23.5%) with little change between 2005 and 2015 – factors likely include an increased life expectancy and shifts in education levels, wealth and improved health.

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\(^6\) Corporation for National and Community Service (CNCS), *Volunteering in America*, [https://www.nationalservice.gov/vcla](https://www.nationalservice.gov/vcla).

• Volunteering among teenagers (16-19) has dramatically increased in the last 25 years; the rates more than doubled between 1989 and 2005 (28.4%) – one factor seems to be the growth of school-based service efforts.
• Volunteer rates among undergraduate students remain low – a main factor being that an average of 72% of undergraduate students are employed, with 25% working full time, year round, leaving little time to dedicate to volunteerism. The likelihood of working is independent of the type of institution students attend.⁸

Based on 5-year data reported by the Bureau of Labor Statistics for men and women, women are consistently more likely to volunteer than their male counterparts -a similar trend to what is seen in philanthropic giving.⁹

- **Women view giving** of time and resources as a collaborative, shared event as proven by the general activities they partake in.
- Female volunteers are more likely to participate in collecting, preparing, distributing, serving food, tutoring/teaching, or fundraising whereas males generally engage in labor, coaching, supervising, collecting or distributing.
- Theories about the greater likelihood of females volunteering may also be attributed to a function of division of labor drawn from traditional social roles.¹⁰

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<thead>
<tr>
<th>Number of Volunteers</th>
<th>Percent of Total Volunteers</th>
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<tr>
<td></td>
<td>Total Number</td>
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<tr>
<td></td>
<td>Men</td>
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<tr>
<td>2011</td>
<td>27.4 M</td>
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<td>2012</td>
<td>27.2 M</td>
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<tr>
<td>2013</td>
<td>26.4 M</td>
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<tr>
<td>2014</td>
<td>26.4 M</td>
</tr>
<tr>
<td>2015</td>
<td>26.5 M</td>
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</tbody>
</table>

In the same survey completed by the Bureau of Labor Statistics, a focus was placed on racial and ethnic groups. Compared to whites, people with racial and ethnic diversity volunteer less.

- Higher rates of volunteering are seen by White residents (26.4%) than African Americans (19.3%), Asians (17.9%) and Latinx (15.5%).
- Data suggests that racial and ethnic diversity among major groups may be driven by an influence of individual resources and social capital.

**US Volunteerism by race from 2011-2015**

The lowest rate of volunteerism was among Hispanic or Latino Residents. More White residents said they volunteered than any other group.

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* May include respondents of any race.

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11 CNN, “Stats reveal how generous Americans are with their time,”
• The percentage of total volunteers by race nationally hovers in the upper 70’s for white residents in comparison to other racial and ethnic groups, thus confirming a similar trend seen in UWDC data.

**Local Trends**
Data measuring volunteerism in Dane County has been scarce. The CNCS survey has included overall data on Wisconsin and limited data for mid-size cities including Madison; however, the report is inconsistent in what is measured from year to year and lacks data in demographics, race and economic status. Below is some of the local information from that study.

- Wisconsin residents volunteer an average of 37.2 hours/resident* placing Wisconsin close to the national average, but 9th among states in the U.S.12

*Data pooled from 3-4 years

**Volunteers in Wisconsin by Year**
Wisconsin residents have been volunteering and continue to volunteer more than the national average both for numbers of volunteers and hours.

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12 Corporation for National and Community Service (CNCS), *Volunteering in America*, [https://www.nationalservice.gov/vcla](https://www.nationalservice.gov/vcla).
**Percentage of Donations in Wisconsin**

Over the past few years there have been increased shifts in philanthropy—including donors wanting more choice and ownership. But, the fact that volunteers are still significantly more likely to donate to charity than non-volunteers provides an exceptional opportunity for future fundraising efforts. We need to adjust to these realities to continue to lead in the way we have for 97 years. There are more opportunities for engaging donors than ever before and United Way offers a deep knowledge and capacity to engage volunteers and donors in short and long term, simple and skilled volunteer activities.
Volunteer Hours Within the Agenda for Change

We have also been tracking volunteerism within UWDC through end of year partner agency results reports in order to understand the impact of volunteerism on the Agenda for Change, UWDC’s roadmap for family stability and mobility from poverty. Similar to the CNCS survey addressed in Section III B, volunteering reported by agencies had been slightly declining until an upward swing in 2017, and even higher reported results in the latest report from 2018.

Contradictory are the results reported by agencies on programs funded by United Way to support Agenda for Change goals. Although we feel that our volunteer programs through UWDC and our partner agencies are successful, our current reporting system shows our program volunteerism to be on the decline. According to feedback across multiple stakeholders, the data is inconsistent, based on memory or anecdote and may often be siloed or duplicated. Through the current reporting system, volunteer data is only reported annually and may only reflect estimates.

Note that internal UWDC volunteers (those serving on our committees, affinity groups, or boards) are not included in the data above, but rather in the bar graph below. On average, 1,100 UWDC volunteers support United Way’s work annually. Our volunteers serve as the foundation of our organization, continuously challenging us to be better advocates and adhere to our mission of uniting the community to achieve measurable result and change lives.
Key Insights:

- Data trends remain fairly consistent by age groups over the decades, but the areas of interest of volunteerism and how and when individuals volunteer have shifted – we can leverage skills and interests to match community needs
- Many organizations struggle to engage volunteers who reflect the racial and ethnic diversity of the communities they serve and it is important that we create inclusive opportunities for civic engagement in an increasingly diverse population and provide opportunities to bring the community together to connect by giving back
- If Madison data is above the national average and rising, yet UWDC program data shows a decline, we need to verify the accuracy of our data or improve how we lead and report on volunteerism

IV. Current Volunteer Engagements

As previously mentioned, United Way of Dane County is involved with volunteerism in a number of important ways by driving collaboration between the community, partner agencies and corporate partners. United Way of Dane County currently manages volunteerism in the following categories:

Events Volunteering directly through United Way of Dane County

- Seasons of Caring: Our year-round engagement program brings the community together to make greater impacts through volunteerism. We host four opportunities during April, June, August and the holiday season in partnership with local nonprofit agencies. We leverage these events, such as Global Youth Services Day, in coordination with national and local observances, which are well received by the community, volunteers, and partner agencies.

Corporate Engagements

- Corporate events: We plan, coordinate and help execute larger scale events such as “Volunteer Days”.
- Ad hoc activities
  Throughout the year, we receive various requests from corporate partners to facilitate onsite team building engagements ranging from assembling snack packs (snacks with an encouraging note for students) provided to students in the Madison Metropolitan School District to Books for Babies (a packet for new parents) delivered to every baby born in Dane County at UnityPoint Health Meriter and SSM Health.
• Other engagement and impact examples include:

<table>
<thead>
<tr>
<th>Engagement Examples</th>
<th>Education</th>
<th>Income</th>
<th>Health</th>
</tr>
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<tbody>
<tr>
<td>Books for Babies</td>
<td>Poverty/Tough Choices/Re-Entry Simulations</td>
<td>Healthy Food Gleaning</td>
<td></td>
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<tr>
<td>Literacy kits</td>
<td>Bike repairs/distribution</td>
<td>Meal serving</td>
<td></td>
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<tr>
<td>School backpack</td>
<td>Food sorting/meal packing</td>
<td>Glasses donations</td>
<td></td>
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<tr>
<td>supplies packing</td>
<td>House cleaning supplies donation</td>
<td>Snack pack assembly</td>
<td></td>
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<tr>
<td>Book drives</td>
<td>Personal hygiene products donation</td>
<td>Vision/mobility</td>
<td></td>
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<tr>
<td>Infant needs drives</td>
<td>Professional/work clothes donation drives</td>
<td>simulations</td>
<td></td>
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<td>(formula, diapers)</td>
<td></td>
<td>Meals bags decor</td>
<td></td>
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<tr>
<td>Winter clothing</td>
<td></td>
<td>decorating</td>
<td></td>
</tr>
<tr>
<td>drive</td>
<td></td>
<td>Card making</td>
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<thead>
<tr>
<th>Impact Examples</th>
<th>Education</th>
<th>Income</th>
<th>Health</th>
</tr>
</thead>
<tbody>
<tr>
<td>Parent coaching</td>
<td>Job Readiness Fairs (resume &amp; interview techniques)</td>
<td>In-kind dental care</td>
<td></td>
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<tr>
<td>Book buddies</td>
<td>Financial literacy coaching</td>
<td>Transportation to and from appointments</td>
<td></td>
</tr>
<tr>
<td>Childcare/ supervising</td>
<td>House building</td>
<td>Home/lawn chores</td>
<td></td>
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<tr>
<td>Tutoring</td>
<td></td>
<td>SmartMeds reviews</td>
<td></td>
</tr>
<tr>
<td>Mentoring</td>
<td></td>
<td>Safe at Home</td>
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</tr>
</tbody>
</table>

**Collaboration with Local Nonprofits**

• VolunteerYourTime.org (VYT): UWDC manages the volunteering hub where nonprofit agencies list information about their agency and current volunteer opportunities. Volunteers can search for opportunities by interest, skill, zip code, day of the week and more. Some features for nonprofits include:
  o Personal contact with interested volunteers by phone and direct email, as well as a volunteer referral management and tracking tool.
  o Ability to post one-time opportunities or special events on a Calendar feature.
  o A leadership volunteer opportunity section which allows recruitment for board members, committee members and volunteer consultants.

**Data from VYT:**

<table>
<thead>
<tr>
<th>VolunteerYourTime.Org</th>
<th>Registered Users</th>
<th>Unique Visitors</th>
<th>Average Unique Visitors Per Month</th>
<th>Mobile Users</th>
<th>Mobile Bounce Rate</th>
<th>Desktop Users</th>
<th>Desktop Bounce Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2016</td>
<td>5,782</td>
<td>31,154</td>
<td>2,596</td>
<td>18.99%</td>
<td>49.30%</td>
<td>75.95%</td>
<td>41.14%</td>
</tr>
<tr>
<td>2017</td>
<td>8,498</td>
<td>31,599</td>
<td>2,633</td>
<td>21.8%</td>
<td>54.6%</td>
<td>73.8%</td>
<td>35.2%</td>
</tr>
<tr>
<td>2018</td>
<td>11,796</td>
<td>36,617</td>
<td>3,051</td>
<td>24.44%</td>
<td>57.64%</td>
<td>70.93%</td>
<td>41.27%</td>
</tr>
</tbody>
</table>
A bounce rate is the percentage of visitors to a particular website who navigate away from the site after viewing only one page. The bounce rate ranges are as follows:\(^\text{13}\):

- Excellent: 26 to 40 percent
- Average: 41 to 55 percent
- Poor: 56 to 70 percent

VYT’s current bounce rates are much higher than our desired average to excellent.

**Ongoing Skills-Based**

- **Schools of Hope**: The Schools of Hope AmeriCorps Project (SOH) is a dynamic community partnership which has developed an evidence-based model of tutoring intervention led by impassioned AmeriCorps members and committed community volunteers. Its mission is to provide literacy tutoring support to improve the academic achievement of kindergarten through fifth grade students. The program serves elementary school students in Madison and Sun Prairie.
  - In 2017-2018, Schools of Hope served 19 elementary schools. 330 volunteers tutored over 1500 elementary children in literacy.
  - The team of AmeriCorps members also supported Madison School Districts’ summer program by distributing ~4,800 books to low-income students to help them build home libraries.

- **Achievement Connections**: Achievement Connections mobilizes over 20 AmeriCorps members and hundreds of volunteers to support students in learning Algebra and Geometry in high schools.
  - In the 2017-2018 academic year, 70% (2,104) of a combined 2,987 elementary, middle, and high school students received 15+ hours of tutoring in reading and math.
  - The four year Dane County Graduation Rate for 2016-2017 year is 90.8%, up from 87.8% in 2013. Black and Latinx four year rates are now 76.5% and 80.0% compared to 60.9% and 73.7% in 2013.

- **Skills-Based Volunteering** means leveraging specialized skills and talents of individuals to strengthen the infrastructure of nonprofits, helping them build and sustain their capacity. Examples include unpaid volunteers, loaned executives, interns, pro bono work, data analytics support and more.

**Internal/Leadership Volunteering (for UWDC)**

- **Board and Committees** – nearly 60 committees (ranging from Leadership Giving Councils to Community Solutions Teams to the Law Enforcement and Leaders of Color Collaboration) with over 1,000 community minded individuals.

- **United Way 2-1-1 volunteers** – approximately 10 volunteers serve as a frontline resource for those in the community who need or want to give help

- **Affinity Groups** – councils who plan ongoing signature volunteer projects for their members
  - Women United: philanthropic women
  - Key Club: family and business volunteers
  - Rosenberry Society: young professionals
  - READI (Retired Employees Are Dedicated Individuals): retirees
  - BYFY (By Youth For Youth) and Student United Way: youth volunteering

Key Insights:

- Seasons of Caring has been well received as a year-round engagement program and one that the community, volunteers, and partner agencies ask about annually.
- Ad hoc requests from corporate partners for volunteer engagements are to be expected and a process should be created to anticipate this influx.
- While VYT is a great resource, many capabilities are not being fully utilized – there are capabilities such as tracking hours, conducting surveys and distribution of communications. The platform should be evaluated in conjunction with our technology team and updates made accordingly.
- There has been consistent feedback that the VYT site is not mobile friendly, and the bounce rate has been steadily increasing.
- UWDC relies on over 1,000 internal volunteers annually to continue to achieve measurable results and change lives.

V. Best Practices

As we researched volunteerism, time was spent connecting with other United Ways, partner agencies, corporate partners and individual volunteers through meetings and phone interviews to assemble input on best practices and to collaborate where resources already exist. United Way staff also attended the United Way Strategic Volunteer Engagement Summit hosted by United Way Worldwide to gather additional insights.

A. Measurement, Evaluation and Distribution

Through research outlined in Section III, it is evident that there are difficulties in consistently measuring volunteerism. “It is daunting because the vast majority of United Ways and even corporations are not consistently measuring the impact of volunteerism, but many are trying to figure out a solution. We are truly looking for a pioneer in this space,” stated a representative from United Way Worldwide.

Challenges in Measurement
Measurement of volunteerism is a challenge mainly due to lack of resources and tools. While nonprofits recognize the need to show their impact, 70% face significant challenges in doing so.¹⁴

- Most organizations think that measuring impact is important, but just 55% actually do it and only 19% use the data to make adjustments to the volunteer program itself.
- A lack of resources and tools hinders 34% of organizations from measuring volunteer impact.
  - 29% say lack of skills or knowledge, and 25% say lack of time prevented impact assessment.
- The variety of volunteering opportunities also contributes to measurement challenges as there is not one uniform type. Types of opportunities include:
  - Episodic to skill-based to boards/committees to direct service.

- Short-term vs longer term
- High impact vs lower impact

Despite all these challenges, we see benefits when impact can be demonstrated – grants and donations increase by 17%.

When it comes to measurement, evaluation and distribution, United Ways across the nation are innovating in this space and have identified best practices to help gather consistent data:

**Measurement and Evaluation**
- Identify early what data you will track and the method for tracking it
- Start with basic measurements, then build upon that data
- Use a mixture of quantitative and qualitative methods

According to United Way of Central and Northeastern Connecticut, “In order to begin to implement a system to track collective impact, measurement must be intentional, consistent and simple. Do a simple five question survey for volunteers, but make sure you do it every time you have an engagement to track consistently and connect the findings to support outcomes for long-term programs.”

> “We don’t have a volunteer database to track volunteers because we cannot afford one. It would be great to have one database with all information including a volunteer profile.”
> — Volunteer Manager from Partner Agency

> “Volunteer data is only reported yearly – it seems like some of the numbers are only estimates. We would be willing to report on a quarterly basis.”
> — Volunteer Manager from Partner Agency
**Case Study: Sample Measurement System – Trident United Way, North Charleston, SC**

Background: Trident United Way was experiencing a similar challenge with demonstrating the impact of volunteerism. They created a system (formula and scorecard) to evaluate their local programs.

**Evaluation**
- Collect data to develop an agency score card
  - Number of completed projects
  - Number of volunteers and hours
  - Survey results (satisfaction rates, testimonials, increased understanding)
  - Value Add of Volunteers = Total Hours - ((Total Hours)/(N Volunteers)*# Supervisors) x $11.11

![RBA Program Performance Framework](image)

**Distribution**
- Package the data in easy-to-share formats so that your agency and company contacts can distribute within their organizations
- Work with Marketing and Communications team to develop branded, customizable templates for conveying data to your stakeholders
- Tell the positive community change story in a meaningful way
Sample scorecard – each partner agency receives an annual scorecard outlining their individual impact.
B. Engagement

Given the research and community feedback, we know that volunteers are doing a lot of great things in Dane County, but we also know that individual volunteers and corporate partners want to do more with their time to truly make an impact. Additionally, the more that volunteers relate to the work, the more likely they will find their experience to be rewarding and satisfying.\(^{15}\) It is imperative that we gauge what is important to various stakeholders while also determining how we can shift from reactive to purposeful volunteering. The end result will lead to more efficient coordination and alignment of needs in the community with appropriate volunteer engagements. This type of matching process consistently falls in the top five biggest challenges for volunteer managers.\(^{16}\)

United Way Worldwide

According to the 2018 Summit held with United Way Worldwide staff leaders in volunteerism, the Volunteer Engagement Landscape has diverse features that can be characterized by:

- **Frequency**
  - Episodic volunteers may participate in unique one-time events such as a day of service or a longer limited engagement which may go on for a few months.
  - Ongoing volunteering implies that the volunteer activities occur on a continuing basis without a predetermined end date.

- **Relationship**
  - When a volunteer does not have a strong relationship with United Way and sees United Way as an intermediary between themselves and the agency where they volunteer, the activity is transactional.
  - Volunteering is relational when the volunteer has a strong relationship to United Way and considers themselves a United Way volunteer.


Case Study: Skills-based Volunteering – United Way of Massachusetts Bay and Merrimack Valley

Background: United Way of Massachusetts Bay and Merrimack Valley looked at community needs specifically in the Boston area along with the strengths of their local businesses (biotechs, financial firms). They worked with their corporate partners in tandem to develop projects, such as STEM kits and an 8-week onsite experience program for high school students, to tie together the needs and skills in their community.

They used the following best practices to shift to purposeful volunteering utilization through collaboration with agency and corporate partners and volunteers:

Corporate Partners
- Build year-round volunteer engagement plans early on with companies in your top tiers and trusted agency partners
- Offer all of your major sponsors a ‘seat at the table’ to send an employee to be part of the major events planning committees

Partner Agencies:
- Meet with partner agencies with volunteer managers to gather feedback and needs on a quarterly basis

We also gathered information from local representatives and similar themes and opportunities were applicable to volunteerism in Dane County.
“It would be helpful if there was more of a tool to match volunteer skillset with community need.”—Seasoned Volunteer

“There needs to be more training for consistency of volunteers and an increase in awareness.”—Seasoned Volunteer

“Not only are we looking to measure the impact of the volunteerism on the community, but we want to show the skills and professional development achieved through the experience – team building, leadership and more.”—HR Manager from Corporate Partner and Seasoned Volunteer

“We aren’t looking for a one and done. We want more ways for employees to connect to the opportunities on a personal level.”—HR Director from Corporate Partner

“We would welcome additional ways to partner and collaborate with United Way of Dane County and other nonprofits to pool resources.”—Volunteer Manager from Partner Agency

“Volunteerism is part of our company’s value. We look at current issues in the community to understand where we can be a resource and match them with our skill sets.”—Social Impact Engagement Manager from Corporate Partner

Key Insights:

- We are only just beginning to tap into the corporate partnership space and there are unlimited opportunities, but planning and coordination is crucial for both companies and agencies.
- Education will need to be done surrounding what makes an impactful volunteer activity – finding the balance of fulfilling a community need and team building for the company objective.
VI. Problem Statement

As we have demonstrated, volunteerism impacts the community on multiple levels, but is difficult to measure at a time where corporate requests for volunterism are on the rise. As depicted in the United Way Worldwide volunteer engagement landscape model, often times requests become transactional. In this vast landscape of volunteerism, we have the opportunity to be intentional with our offerings, ensuring they are tailored to demonstrate where our local initiatives fall reflecting the needs in our community. Consistent measurement helps evaluate programs and efficient use of resources, thus maximizing impact. Tracking additional data points such as demographics, race, ethnic background and age will help identify gaps and determine whether our volunteers are a true reflection or representation of our community.

Below we have outlined our current situation:

<table>
<thead>
<tr>
<th>Strengths</th>
<th>Weaknesses</th>
</tr>
</thead>
<tbody>
<tr>
<td>• UWDC is approached as a resource to effectively mobilize the community</td>
<td>• We have fewer touchpoints with businesses who don’t run campaigns and with non-partner agencies</td>
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<tr>
<td>• We have established relationships with corporate partners through workplace campaigns and community partners through VYT</td>
<td>• UWDC has limited staff capacity to take on large requests and the frequency of requests</td>
</tr>
<tr>
<td>• UWDC staff have direct communication to partner agencies and case managers to determine the actual need in the community</td>
<td>• We have no relevant benchmark outside of Seasons of Caring and ad hoc engagements</td>
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<tr>
<td>• We have benchmark data that exists from Seasons of Caring and ad hoc engagements</td>
<td>• Thus far, UWDC has had inconsistent volunteer reporting and no uniform collection process</td>
</tr>
<tr>
<td></td>
<td>• We currently report measurements annually</td>
</tr>
<tr>
<td></td>
<td>• The changes in personnel at agencies leads to variances on how data is captured</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Opportunities</th>
<th>Threats</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Nonprofits, individuals, companies and society benefit as a whole from the impact of volunteerism</td>
<td>• Organizations are looking for team building on site, but volunteer efforts are also needed in the community</td>
</tr>
<tr>
<td>• An upward swing in volunteerism across the nation in recent reports</td>
<td>• Organizations and individuals have a different perspective on the definition and measurement of volunteerism</td>
</tr>
<tr>
<td>• Increase in CSR programs and dedicated staff</td>
<td>• Training agencies and corporate partners on a new measurement process, likely different than their current method</td>
</tr>
<tr>
<td>• Some local businesses and nonprofits do not have a connection to UWDC</td>
<td>• There will be challenges in ensuring consistency in systems</td>
</tr>
<tr>
<td>• Agency and corporate partners expressed interest in a centralized reporting system and process</td>
<td>• Not all agencies have volunteer managers</td>
</tr>
<tr>
<td>• Agency and corporate partners have a desire and need for impact outputs</td>
<td></td>
</tr>
<tr>
<td>• Successful volunteer experiences can build momentum and spread enthusiasm by word of mouth</td>
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</tr>
</tbody>
</table>
Given the lack of current structure outlined in the SWOT analysis, it is apparent that the types of volunteering that are needed do not always align with requests from corporate partners or individuals in the community. To gather more insight, we spoke with various corporate and community partners. A few key issues came to the forefront:

- A need to spread corporate opportunities throughout the year rather than having a “volunteer day”
  - These types of engagements often create more work for the partner agency
- Lack of diversity and cultural competence
- There is a seasonal focus with increase in requests during the holidays

According to a local volunteer manager, “An organization will contact us and say they have three hours on a specific date where they have hundreds of employees who want to volunteer, and they want an activity onsite. This not only puts a stress on our nonprofit, but it isn’t taking the needs of the community into consideration. We want to work with United Way of Dane County to educate companies and individual volunteers to better serve the community while still acknowledging the availability and interests of the volunteer.”

UWDC is the most efficient and effective way to generate resources for over 100 nonprofit human service agencies. We continuously evaluate programming and are results driven; yet, there is a lack of accurate and consistent reporting on volunteerism in Dane County as it ties into the Agenda for Change, our current focus for impact measurement. Measurement will not only aid in increasing volunteerism but will help to focus on purposeful volunteerism by identifying volunteer and agency capacity, determining resources available and guiding program planning to match the needs in the community.

With current low quality data, UWDC feels the need for a more thorough analysis of community needs and desires to effectively mobilize the caring power of our community and make the shift from transactional to intentional volunteerism. This plan aspires to drive impact by matching volunteer experience and desire with community need. In doing so, we will raise community awareness of effective volunteering to advance the Agenda for Change, increase collaboration with corporate and community partners, and effectively track internal and external volunteer engagements in the volunteer categories as outlined in Section IV to demonstrate impact and tell the story of positive community change.

**VII. Strategic Overview**

**Our four strategies to effectively increase and measure volunteerism include:**

**Strategy 1:** Increase collaboration with agency partners to leverage UWDC’s ability to effectively convene volunteers.

- **Rationale:** Share best practices and knowledge to enhance the experience of the volunteers and the community they serve

**Strategy 2:** Cultivate relationships with corporate partners to capitalize on employee volunteerism demands and utilize existing platforms/activities to educate partners on ways to increase impact.

- **Rationale:** Guide businesses in the community to shape and drive volunteer activities
Strategy 3: Increase awareness of the impact of volunteerism to multiple audiences to match volunteer experience and desire to community need.

- **Rationale:** Show the need to recruit a diverse volunteer pool and tailor volunteer programs to match community needs

Strategy 4: Consistently measure and track volunteerism to demonstrate the impact (on both UWDC and Dane County) in order to further increase volunteerism and the overall impact of the Agenda for Change.

- **Rationale:** Identify community needs and volunteer resources to maximize programs

We have also outlined the following:
- Specific tactics for each strategy to occur in the first year following approval and roll-out of the Volunteer Engagement Mobilization Plan
- Proposed recommendation for measurement
- Overarching goals by year surrounding measurement

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Tactic</th>
<th>Measurement</th>
</tr>
</thead>
</table>
| 1. Increase collaboration with agency partners to leverage UWDC’s ability to effectively convene volunteers. | - Align with partner agencies on needs and resources to maximize community impact | - Institute quarterly meetings with partner agency volunteer managers to gather feedback and needs  
- Develop annual volunteer capacity plan and update on a quarterly basis  
- Audit and build upon best practices among the agencies to share and amplify resources  
- Develop a communications process to update agency needs (e.g., United Way in Denver sends out a weekly email to partner agencies to assess needs and update on resources) |
| | - Serve as a resource and the thought leader in volunteerism | - Develop online recruitment and volunteer engagement best practices for internal and external use  
- Create online tool kit for volunteer managers including: templates for volunteer descriptions, volunteer handbook, measurement tracker, infographics, video resource library for professional development  
- Support and promote professional and programmatic development opportunities that others are doing |
### 2. Cultivate relationships with corporate partners to capitalize on employee volunteerism demands and utilize existing platforms/activities to educate partners on ways to increase the impact.

- Develop best practices for working with agency partners:
  - Consistent measurement reporting
  - Matching volunteer capacity and community needs

- Create a toolkit to outline existing process (intake process, overview of UWDC capabilities, sample contracts and budgets)
- Conduct an audit and create a list/database of companies – existing and targets corporate partners
- Create signature UWDC corporate engagement activities including one-off activities in addition to skill-based and leadership opportunities based on the needs of the community
- Create volunteer menu for one-off activities (outlining timeline, resources and budget)
- Match corporate sponsors with partner agencies for ongoing programs based on skills and needs
- Develop educational materials and resources to show the impact of volunteerism (e.g., one pager on one-off activity vs. ongoing commitment to the community)
- Evaluate and revise corporate volunteer engagement plan on an annual basis
- Continue to build Business Volunteer Network (BVN) and promote its value by leveraging 2019’s 20th anniversary

- Create and execute a Corporate Volunteer Engagement Plan to target companies and drive activities

### 3. Increase awareness of the impact of volunteerism to multiple audiences to match volunteer experience and desire to community need.

- Develop a recruitment strategy based on community needs

- Create a process for matching the right volunteer based on interest and skillset to the current community need – the goal is not to increase the numbers of volunteers, but to place them more strategically and in mutually beneficial collaborations
- Improve volunteer experiences with a focus on creation of inclusive spaces to encourage diversification and address capacity gaps
### 4. Consistently measure and track volunteerism to demonstrate the impact (on both UWDC and Dane County) in order to further increase volunteerism and the overall impact of the Agenda for Change.

<table>
<thead>
<tr>
<th>United Way of Dane County Volunteer Engagement Mobilization Plan 2019-2024</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>• Create and execute a content and media plan to show the impact of volunteerism</strong></td>
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<tr>
<td><strong>• Identify mechanisms for reporting volunteer activities</strong></td>
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<tr>
<td><strong>• Develop reports and tools such as infographics for UWDC, partner agencies and corporate partners</strong></td>
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<td><strong>• Disseminate information through targeted channels:</strong></td>
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<tr>
<td>o Traditional and social media</td>
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<tr>
<td>o CRM stream</td>
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<tr>
<td>o Websites (VYT.org, agencies, corporate partners)</td>
</tr>
<tr>
<td><strong>• Align on reporting capabilities of VYT and Community Connect (a database designed for stakeholder management, tracking and evaluation)—determine a centralized system for volunteers, agencies, corporate partners and UWDC or explore an alternative platform</strong></td>
</tr>
<tr>
<td><strong>• Create a document to outline the reporting process for agencies, corporate partners and internally at UWDC through VYT or an alternative platform while incorporating best practices</strong></td>
</tr>
<tr>
<td><strong>• Refresh the VYT volunteer user-experience based on existing capabilities and ensure it is mobile friendly to reduce bounce rate</strong></td>
</tr>
<tr>
<td><strong>• Align internally at UWDC to update end of the year reports or consolidate with new reporting process</strong></td>
</tr>
<tr>
<td><strong>• Measure the impact of these activities on volunteers, partner organizations, and the communities that they serve</strong></td>
</tr>
<tr>
<td><strong>• Rollout reporting process to agencies and corporate partners and internal staff through a training; create online materials for resources and new staff</strong></td>
</tr>
<tr>
<td><strong>• Develop report templates</strong></td>
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<tr>
<td><strong>• Ensure qualitative data is also captured through post-engagement surveys</strong></td>
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</tbody>
</table>
Proposed recommendations for measurement:
Based on input on priorities and needs from internal staff at United Way of Dane County, agencies, corporate partners, and volunteers, we have identified the following proposed measurements:

**QUANTITATIVE TIER 1**
- Number of volunteers
- Number of hours
- Volunteer demographics
- Percentage increase at Seasons of Caring
- Number of corporate engagements
- Engagement outputs

**QUANTITATIVE TIER 2**
- Categorization of the volunteer/beneficiary engagement based on the Agenda for Change
- Volunteer retention
- Volunteer categorization – episodic vs. ongoing
- Tracking donor vs. volunteer and donation growth

**QUALITATIVE**

**Volunteer Learning/Experience**
- Improved understanding of community needs
- Personal outcome (i.e. self-esteem, respect for others)
- Social outcome
- Commitment to Service

**Corporate Impact**
- Improved understanding of community needs
- Customer service/consumer experience
- Employee morale

**Agency Impact**
- Overall program impact/effectiveness
- Evidence of agency changes as a result of the program
- Estimate of burden/benefit on the agency
- Partner’s estimation on benefit/impact of specific activity on community

**Community Impact**
- Effectiveness of program in meeting community goals
  - Testimonials and case studies

**Overarching goal:** To establish baseline volunteer data and grow quality volunteerism through providing engagements that meet the needs of the requestor as well as the community.
VIII. Conclusion

We will continue to work to make an impact through volunteerism in the community by ensuring our volunteer efforts are intentional, representative and relevant to the community we empower. Once we set the benchmark for the current state of volunteerism in Dane County, we will be better served to set goals to move the needle.

As previously stated, our mission is to unite the community to achieve measurable results and change lives. By demonstrating the impact and adapting our local landscape of volunteerism, we can further accomplish this goal.
### IX. Appendix

#### Overarching goals by year:

<table>
<thead>
<tr>
<th>Year</th>
<th>Metrics</th>
<th>Data Collection</th>
<th>Volunteer Capacity/Recruitment</th>
</tr>
</thead>
</table>
| Year 1 | • Establish baseline for quantitative tier one overall measurement  
• Develop best practices and tools for consistent measurement reporting | • Evaluate VYT.org and make updates based on datapoint needs and capabilities  
• Evaluate Community Connect (internal CRM) capabilities for tracking volunteerism | • Develop process to consistently capture community needs from agencies and signature UWDC initiatives |
| Year 2 | • Continue collection of quantitative tier one data measurements to establish comparison data and gather qualitative data  
• Continue to collect data from agency and corporate partners and UWDC | • Based on year one evaluations, select the most appropriate tool to serve as a uniform database for volunteer and agency participants  
• Convey change in data collection with reasoning and teach the new tool to appropriate stakeholders | • Determine the overall volunteer capacity gaps by evaluating baseline measurements compared to community needs |
| Year 3 | • Set overall goals for quantitative tier one metrics growth based on two years work of baseline data  
• Continue to collect data from agency and corporate partners and UWDC | • Work with agency partners to integrate volunteer data into UWDC system | • Implement strategies to address diversity and capacity gaps in volunteerism based on the data (i.e. shifting language, building relationships, removing barriers, increasing efforts to create inclusive environments, engaging youth groups, etc.) |
### Year 4
- Gather quantitative tier two metrics growth and continue capturing qualitative data
- Report three year data trends to agency and corporate partners and continue data collection

- Evaluate integration of tracking system with agency partners and modify as appropriate

- Ongoing recruitment and evaluation of volunteers to match community needs and represent the community voice

### Year 5
- Set overall goals for quantitative tier two metrics growth
- Evaluate 5 year data trends in comparison to national metrics

- Evaluate volunteer capacity and recruitment efforts and modify as appropriate

- Evaluate volunteer capacity and recruitment efforts and modify as appropriate

To reiterate, we plan to set actual goals (percentages or numbers) following the collection of baseline data in year one and two. Though it is still limited data, these two sets of data points will allow for setting an educated and strategic goal for strengthening our community’s capacity. In year four and five we will begin evaluation of our methods to modify our approaches to tracking volunteerism appropriately.
Engaging the community in development of this plan
Success at United Way of Dane County (UWDC) involves engaging our community and ensuring that their voices are heard and integrated. It is through this feedback that we are able to unite the community to achieve measurable results and change lives. In the research and planning phase of this work, internal and external stakeholders representing the corporate and nonprofit sectors were interviewed to gain a better understanding and properly assess our current measurement methods. Additionally, various United Way locations across the nation were consulted to determine and evaluate best practices. Based on input from these and dozens of additional stakeholders, a draft plan was written in December of 2018.

In January through early March of 2019, the draft Volunteer Engagement Mobilization Plan was shared with the following UWDC committees (reflecting over 60 internal volunteers), corporate and community partners listed below, and numerous other stakeholders. We thank them for their invaluable contributions and perspectives to improve and finalize this plan.

Corporate/Business Partners
Alliant Energy
American Family
Boardman & Clark LLP
CUNA Mutual Group
Deloitte Consulting LLP
Effectability LLC
Exact Sciences
John Deere Financial
Madison Gas & Electric
Madison Region Economic Partnership
MIOsoft Corporation
Old National Bank
Rabble – MUSICat
Reynolds Transfer & Storage
Springs Window Fashions
Summit Credit Union
TDS Telecommunications Corp.
The QTI Group
UW Credit Union
Zendesk

Community Partners
Access Community Health Centers
Badger Rock Neighborhood Center
Big Brothers Big Sisters of Dane County
Boys & Girls Club of Dane County, Inc.
Briarpatch Youth Services, Inc.
Catholic Charities, Inc., Diocese of Madison
Centro Hispano, Inc.
Community Action Coalition for South Central Wisconsin, Inc.
Dane County Administrators of Volunteer Services (DCAVS)
Dane County Humane Society
Domestic Abuse Intervention Services, Inc.
Goodman Community Center, Inc.
Habitat for Humanity of Dane County, Inc.
Heartland Hospice
Journey Mental Health Center, Inc.
Literacy Network
Madison-area Urban Ministry, Inc. (MUM)
Madison College
Madison Metropolitan School District
Middleton Outreach Ministry, Inc.
Morgridge Center for Public Service
NewBridge
Operation Fresh Start, Inc.
Planned Parenthood of Wisconsin, Inc.
Porchlight, Inc.
RISE WI
Second Harvest Foodbank of Southern Wisconsin
SSM Health at Home
The Road Home Dane County, Inc.
The Salvation Army of Dane County
University of Wisconsin - Madison
Urban League of Greater Madison, Inc.
Vera Court Neighborhood Center, Inc.
YWCA Madison, Inc.

Community Engagement Committee (CEC)

Everett Mitchell, Dane County Circuit Court, Chair
Nolan Brown, Springs Window Fashions, Co-Chair
Allison Cooley, Effectability, LLC
Gene Dalhoff, Madison Redion Economic Partnership
Kristin Dewey, QTI Professional Staffing
Claude Gilmore, Kennedy Heights Community Center (Retired)
Steph Harrill, UW Credit Union
Janice Hughes, Certified Coaching Executive
Linda Ketcham, Madison-area Urban Ministry
Char Lodl, Springs Window Fashions
Carmen Porco, Carmen Porco Consulting Service
Hedi Rudd, Badger Rock Neighborhood Center
Mya Rolack, Madison Metropolitan School District
Tara Wilhelmi, Goodman Community Center

Business Volunteer Network (BVN) Committee

Chris Smithka, Zendesk, Chair
Jill Peterson, Zendesk, Vice Chair
Adam Erdman, Alliant Engery Foundation
Kingsley Gobourne, Old National Bank
Steph Harrill, UW Credit Union
Jim Jenson, Madison Gas & Electric
Sheila Kuchenbecker, Deloitte Concutling, LLC
Char Lodl, Springs Window Fashions
Ben Reynolds, Reynolds Transfer and Storage
Jody Stolldorf, Summit Credit Union
Amy Thole, John Deere Financial
Jane Wichman, CUNA Mutual Group
Community Impact Advisors Council (CIAC) Committee
May Lor, Madison Gas & Electric, Chair
Avanelle Charles, Community Member
Mary Domingo, Community Member
Ismael Jaral, Madison College Student
Dora Johnson, Community Member
Tony Johnson, Community Member
Lizbeth Lopez, Madison College graduate
Juan Martinez, Community Member
Denise McCarey, Community Member
Carmen Porco, Carmen Porco Consulting Service

Community Volunteer Award (CVA) Committee
Joann Solberg, AAA WI, Co-Chair
Elizabeth Stiehl, BWBR, Co-Chair
Joanna Cervantes, Sunshine Place
Mary Domingo, Community Volunteer
Katrina Dunlavy, WKOW 27
Joan Freeman, Community Volunteer
Laura Frisque, UW Credit Union
Laura Gmeinder, Laura Gmeinder Coaching and Consulting LLC
Dora Johnson, Community Volunteer
Karen Kallerud, Community Volunteer
Char Lodl, Springs Window Fashions
Lea Stokes, Community Volunteer
Gina Wilson, Second Harvest Foodbank of Southern Wisconsin

Strategic Collaboration for Community Engagement (SCCE) Committee
Jeanette Arthur, NewBridge
Lisa Curley, Dane County UW-Extension
Kingsley Gobourne, Old National Bank
Jessie Starr, Madison Childrens Museum
Tara Wilhelmie, Goodman Community Center