



THE FUNDER'S GUIDE

TO INVESTING IN VOLUNTEER ENGAGEMENT

THE LEIGHTY
FOUNDATION

DEAR COLLEAGUE

MESSAGE FROM OUR PRESIDENT

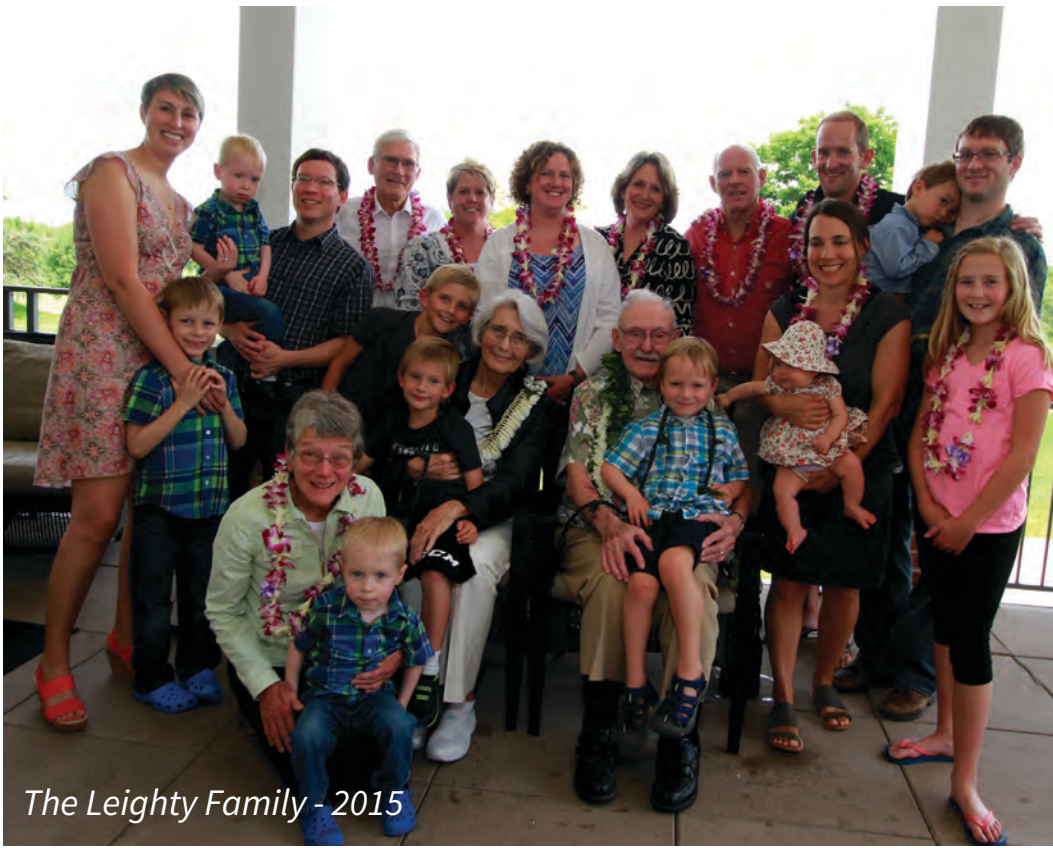
Most of us would agree that our current and future grantees are facing a daunting future of shrinking financial resources and dramatically escalating needs. We also know that only a small fraction of the necessary dollars will come from the philanthropic sector. Many are in very vulnerable situations with looming cuts to budgets and programs.

BUT, there is a vastly underutilized and virtually unlimited renewable resource from which to draw—Volunteer Energy!

That's the good news. The bad news is that the challenge won't be as simple as increasing the number of people who want to volunteer. Effectively tapping this resource requires building innovative organizational infrastructures to connect those who volunteer with high impact opportunities that empower them to make a real difference!

Volunteer energy represents a resource that has only begun to be tapped and all too often is poorly stewarded. People of all ages want to be involved in something beyond themselves: from children who raise money with lemonade stands to newly retired men and women (many of whom were professional leaders in the corporate and nonprofit sector) who seek encore volunteer careers and are eager to share their wisdom, expertise, and encouragement.

Deploying large numbers of volunteers, however, does not necessarily translate into success for the nonprofit or the community. Success results when an organization engages and empowers its volunteer resources to produce the greatest possible impact on a problem or need.



The Leighty Family - 2015

“ As the demand for nonprofit services increases, one way to help meet that demand is to engage more volunteers and maximize their contributions. This requires competent empowerment of volunteers, and adequate investment in the nonprofits to whom they give their time and talent. ”

- Jane Leighty Justis -

The sad truth is that a large percentage of nonprofit organizations that say they so desperately need this help also say they do not currently have the infrastructure to effectively deploy additional volunteers.

For the last 20 years, our foundation has worked closely with community stake holders, volunteer centers, nonprofit capacity building providers, and individual organizations to raise the level of competence in effectively engaging volunteers. We have seen firsthand the transformation and innovative strategies born of organizations, and their ability to expand and increase the quality of their services for the benefit of their communities.

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.

Join with us in taking advantage of this unique opportunity to provide the training, staffing and resources needed to create the culture and the structures that utilize volunteer energy. Through our support we will begin to close the gap between the needs of organizations and their ability to effectively engage volunteers.

Regardless of the focus of your foundation, supporting your grantees’ ability to engage and empower volunteers can dramatically expand their ability to accomplish their mission. Our investments have the potential to produce immeasurable returns—for individuals, organizations, and ultimately our communities!

I wish you all the best as you explore, and hopefully discover opportunities to build the capacity of organizations to maximize the power of volunteer engagement! Please visit our website at www.leightyfoundation.org for more information.

Sincerely,

Jane Leighty Justis, President, The Leighty Foundation

www.leightyfoundation.org

Preface

With UPS Foundation as the premier funder, the original version of this guide was developed in 2004 with contributions from more than 50 grant makers, nonprofit leaders and corporate executives from across the United States.

This revised guide provides a platform for funders, corporations, government and other stakeholders to learn more about how and why investing in strategic volunteer engagement will increase the impact of the organizations they support. The guide features:

- **Current research and its implications for volunteer engagement**
 - **Tools and information to assess a nonprofit's organizational capacity for volunteer engagement**
 - **Options for supporting volunteerism and volunteer engagement in local communities**
 - **Successful models of funder investment in volunteer engagement**
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Table Of Contents

| | |
|---|----|
| THE POWER OF STRATEGIC VOLUNTEER ENGAGEMENT | 01 |
| FROM INVESTMENT...TO IMPACT! | 02 |
| CURRENT RESEARCH AND ITS IMPLICATIONS FOR VOLUNTEER ENGAGEMENT | 03 |
| A TOOL FOR ASSESSING GRANTEES' CAPACITY TO ENGAGE VOLUNTEERS | 05 |
| CALL TO ACTION: OPTIONS FOR FUNDER SUPPORT OF VOLUNTEER ENGAGEMENT | 07 |
| SUCCESSFUL MODELS OF FUNDER INVESTMENT IN VOLUNTEER ENGAGEMENT | 09 |
| ADDITIONAL RESOURCES | 13 |

THE POWER OF STRATEGIC VOLUNTEER ENGAGEMENT

Civil society and democracy were born from a spirit of voluntary action and a commitment to improving the land in which we live. The nonprofit sector developed as a formal structure to address many of the world's most pressing needs on local, national and global levels. Volunteers created the nonprofit sector and, while much of the arena has become professionalized, **volunteers remain fundamental to the success and sustainability of the entire sector.** The investment of human capital fuels much of the infrastructure that allows nonprofit organizations to meet critical needs. Yet, finding support for effective engagement and deployment of volunteer resources remains challenging.

While organizations usually consider funds, in-kind donations, facilities and staff members as strategic resources for mission-fulfillment, those who volunteer are often viewed as a “program.” When volunteers are relegated to “program” status, they become an audience to be served, not partners in fulfilling the mission. Yet, volunteers possess a passion to contribute their time, skills and vast networks on behalf of causes they support.

WHEN VOLUNTEER ENERGY IS TAPPED INTENTIONALLY AS AN ORGANIZATION-WIDE STRATEGY, IT BECOMES A VITAL RESOURCE FOR MISSION ACCOMPLISHMENT.

As investors in the nonprofit sector, grant makers, businesses and government must ask the following questions:

How can we better support and build capacity within the sector?

How can we achieve a greater return on investment of the dollars and efforts we contribute to our grantees?

A logical and often overlooked response to these questions is to build greater capacity by supporting effective volunteer engagement and the infrastructure that sustains it.

Among the primary reasons people stop volunteering is poor management and a lack of organizational support. Engaging volunteers strategically takes knowledge, planning, infrastructure and skilled leadership. In this time of limited resources and escalating needs, organizations are being called upon to provide more and better quality services. They must optimize the investment of volunteer time by engaging and supporting volunteers appropriately and efficiently.



FROM INVESTMENT... TO IMPACT!

Communities benefit from engaged citizens and increased capacity for impact

Organizations experience exponential growth of resources: services, donations and community advocates

Volunteers are engaged in mission-critical work

Staff is educated in best practices for recruiting, training, placing and retaining volunteers

Volunteer managers are empowered through increased training, resources and time

Funders invest in volunteer and community engagement infrastructure

CURRENT RESEARCH AND ITS IMPLICATIONS FOR VOLUNTEER ENGAGEMENT

Putting Volunteer Engagement at the Core of an Organization

In 2009, Reimagining Service, a national cross-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. The term “Service Enterprise” was coined to describe an organization that fundamentally leverages volunteers and their skills to achieve its social mission. Service Enterprise certification, a comprehensive training program, is currently offered through Points of Light.

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.

- Points of Light -

As funders, we pay great attention to how potential grantees steward their financial resources, but do we pay equal attention to how they lead and manage their human resources?

Both are critical to the success and sustainability of the organization. Compelling reasons to support and invest in volunteer engagement infrastructure include:

EFFECTIVE VOLUNTEER ENGAGEMENT:

1. Leverages and increases the impact of grant making.

- When engaged effectively, volunteers augment an organization’s financial and in-kind resources, producing **greater value for each dollar invested**.
- Volunteers provide new or expanded services to increase the return on investment and add significant value to the objectives of grants received by organizations.

2. Is linked to stronger, more effective and more efficient organizations as a whole.¹

- All organizational capacities are **significantly and markedly stronger** for nonprofits with a strong volunteer engagement model.
- When organizations engage any number of volunteers well, they are proven to be significantly better led and utilized as a whole.
- Organizations that fundamentally leverage volunteers and their skills to accomplish their missions are significantly more adaptable, sustainable and capable of going to scale.
- Organizations that engage volunteers are **equally as effective as their peers without volunteers, but at almost half the median budget**.

¹TCC Group, “‘Positive Deviants’ in Volunteerism and Service: Research Summary,” <http://www.pointsoflight.org/service-enterprise-initiative/research>

3. Occurs when there is strong organizational and community infrastructure.

- The organization's leadership (i.e. board, executive staff and funders) must consider support of the volunteer infrastructure to be as important as any other organizational resource.
- Having a strategic volunteer engagement model requires strong and well-developed human resources management practices.² The ability to engage and retain increasingly diverse volunteers requires highly competent leadership.

4. Occurs when board and staff at all levels are adequately trained.

- Training helps board members—many of whom are corporate and philanthropic leaders—and executive staff members understand that well-supported volunteers can increase an organization's service and fundraising capacity.
- Training of volunteers and of the staff who support them is vital to successful volunteer engagement models.

5. Is directly related to increased funding for the organization - People give their money where they give their time.

- Volunteering can be an important way of evaluating an organization for future financial support, as a significant number of donors (2 in 5) volunteered at a charity before making a financial donation to that organization.
- Half of volunteers say that volunteering leads them to give more financial support.
- Nearly 70% of high net worth individuals give financially to the organizations with which they volunteer.
- Organizations that provide robust volunteer opportunities have an edge in creating a steady donor base and in growing their overall level of financial support.
- Compared to younger volunteers, those 61-70 years old (65%) are more likely to show interest in opportunities that require a specific skill set. These same volunteers are increasing their interest in philanthropy.
- According to a 2009 study by Fidelity Charitable, a majority of high-net worth donors who volunteer give up to ten times more than non-volunteers, and most donate to the organizations in which they are involved. Nearly half of the wealthy donors interviewed give financially to most of the organizations where they volunteer.³

Investing in Volunteer Engagement has a Big ROI

Investing in robust and strategic volunteer engagement infrastructure pays off significantly (i.e. organizations certified as Service Enterprises have reported a \$6 return in volunteer value for every dollar invested in volunteer engagement).⁴

Research Shows that Effective Volunteer Engagement...

- Is linked to stronger, more effective and more efficient organizations as a whole
- Is directly related to increased funding for the organization
- Is strengthened by ongoing training and development
- Requires solid organizational and community infrastructure

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

³Fidelity 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>

⁴Points of Light, "Where Should Nonprofits Use Volunteers? Everywhere." <http://www.pointsoflight.org/blog/2013/10/22/where-should-nonprofits-use-volunteers-everywhere>



A TOOL FOR ASSESSING GRANTEES' CAPACITY TO ENGAGE VOLUNTEERS

The questions below can be used to assess an organization's overall capacity to recruit, engage, manage and sustain volunteer resources, and increase impact through strategic engagement. They can also spark dialogue with organizational leadership regarding:

- **Useful indications of an organization's capacity**
- **Readiness to engage volunteers and other community resources strategically**
- **General health and sustainability**

Asking the right questions can help in three ways:

- 1 Grant makers have specific information to use in deciding whether a request is viable and worthwhile.
- 2 Grant seekers respond by assessing how their organization or program measures up to a set of generally recognized standards for volunteer involvement.
- 3 Grant makers and grant seekers can initiate dialogue regarding strategies that build their capacity.

ASSESSMENT TOOL

Volunteer Involvement

- How does the organization determine the best way to involve volunteers in meeting its mission?
- In what specific roles does the agency involve volunteers and are those roles developed in response to real needs of the organization and community?
- To what extent does the volunteer pool reflect the diversity of the community it serves?
- Does the organization engage volunteers in roles that leverage their skills and treat them as equal members of work teams?

Organizational Commitment to Volunteer Engagement

- Is volunteer engagement a strategic resource in the organization's strategic plan?
- Do organizational leaders actively support and model strategic volunteer engagement?
- Is there a budget to support volunteer involvement (e.g., technology, training, coaching equipment, recognition)? What percentage of the agency budget does it represent?
- Is there a professional dedicated to volunteer engagement on staff? What is that person's experience or qualifications for the position? Where is that role within the organizational structure—does its position reflect the resources this individual manages?
- Are volunteer engagement policies and procedures comprehensive, clear and consistently applied?

Training and Professional Development

- How are volunteers trained or oriented about their work and the agency?
- Do additional staff members supervise volunteers in the agency? If so, what training do they receive to prepare them to manage their unpaid staff?
- How does the organization train and develop its volunteer board of directors?

Impact and Evaluation

- How does the organization measure and communicate the overall impact of volunteer involvement?
- What would the organization not be able to accomplish without volunteers?
- How many volunteers does the organization involve annually in various roles – from direct service to pro bono/ skills-based opportunities?
- What is the monetary value of the time given by volunteers annually? How does the organization determine this value?
- Is volunteer supervision a performance measure or accountability indicator for staff? Is volunteer engagement included in staff job descriptions?

Project Management in Relation to Grant Proposal

- How does the involvement of volunteers enhance or support the project goals and the organization's mission?
- How will other staff ensure that volunteers are engaged effectively and have positive experiences?
- Does the organization have a budget for volunteer resources management on this project?
- What additional training, supervision or evaluation strategies related to volunteer engagement will support this project?

CALL TO ACTION!

Options for Funder Support of Volunteer Engagement

Whether due to budget constraints, competing demands or lack of understanding about the return on investment in building volunteer infrastructure, **these and other examples of investment in volunteer engagement remain the exception rather than the rule.**

Grant makers, government, businesses and nonprofits need to work together to increase awareness and support for volunteer engagement. Towards this end, the nonprofit sector has been developing better ways to assess and report the impact of volunteer service. While a standardized approach to assessing impact across all nonprofit organizations may not be feasible, some new tools are emerging, including, for example, Points of Light's Return on Volunteer Investment calculator (ROVI)⁵ and the increasing use of outcomes-based evaluation. One of the best funder investments in the future will be supporting the certification of their grantees as a Service Enterprise.

We as funders need to seize this unique opportunity to build nonprofit capacity and to sustain and promote more effective volunteer involvement. What follows are actions which can make this goal a reality:

Influence the Funding Dialogue

- Examine our values and beliefs about the power and potential of volunteer engagement.
- Facilitate or convene dialogue with other grant makers and nonprofits in the community on volunteer engagement strategies and best practices.
- Convene funders in your community to explore how you might enhance the engagement strategies of your grantees.
- Work with your local volunteer center, corporate volunteer councils and United Way to support effective volunteer engagement in the community.
- Involve grantees in learning and developing measures to assess the impact that volunteer involvement has had on mission fulfillment. Share those measures with colleagues.
- Ask for feedback regarding volunteer successes and challenges in your grant application and evaluation forms.
- Add a question to application/site visit about an organization's philosophy of role and value of volunteer partners.

Make Strategic Investments

- Support research and evaluation of the return on funder investment in volunteer engagement. This is being done in partnership with higher education and policy research centers, as well as with nonprofits.
- Become familiar with certification programs such as the Service Enterprise Initiative and Certification in Volunteer Administration; support organizations and professionals in their certification process.
- Fund a volunteer engagement assessment to help grantees evaluate their current practices. Such audits are available through consultants, university assessment programs and some nonprofit centers.
- Make volunteer involvement and demonstrated effective volunteer engagement practices a condition for larger funding.

⁵ <http://verifiedvolunteers.com/resources/return-on-volunteer-investment-calculator>

EFFECTIVE VOLUNTEER INVOLVEMENT

- Welcome a budget line item to fund a volunteer engagement professional, volunteer resources management technology and software, training and coaching for staff on volunteer engagement and other vital volunteer resources.
- Support existing professional development, training and networking opportunities for executive directors, managers of volunteer resources and other organizational staff and volunteer leaders; provide scholarships to enable those professionals and volunteer leaders to participate.
- Sponsor a survey or case study on current engagement practices and/or challenges among your grantees and other nonprofit organizations.
- Create innovation awards for organizational leaders who demonstrate unique approaches that address common engagement challenges.
- Support and encourage academic centers to improve their curriculum on volunteer engagement, nonprofit management and corporate philanthropy.

- LEVERAGES AND IMPROVES GRANT MAKING AND CORPORATE COMMUNITY INVOLVEMENT
- SUPPORTS BUSINESS OBJECTIVES
- STRENGTHENS THE NONPROFIT SECTOR BY INCREASING CAPACITY TO DELIVER SERVICES
- REQUIRES SPECIALIZED ORGANIZATIONAL AND COMMUNITY INFRASTRUCTURE AND SUPPORT
- REQUIRES ONGOING TRAINING AND DEVELOPMENT
- CONTRIBUTES TO MAINTAINING A CIVIL SOCIETY



SUCCESSFUL MODELS OF FUNDER INVESTMENT IN VOLUNTEER ENGAGEMENT

The Leighty Foundation



THE LEIGHTY
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The Pikes Peak Volunteer Engagement Initiative sought to increase the effectiveness of nonprofit volunteer engagement strategies in the Colorado Springs, CO area. The goal was to enhance organizations' capacity to fulfill their missions and meet community needs. Based on its core belief that volunteer engagement is a critical strategy to fulfill mission, The Leighty Foundation funded and led a five-year Initiative to increase the capacity of nonprofit organizations in the region. *As part of this Initiative, the Foundation invested in individual organizations through Volunteer Impact Grants: in the community through securing experts to provide training support to dozens of organizations, and in the future through its support of the Center for Nonprofit Excellence as host of the ongoing work.*

In its first phase, the Initiative convened and connected board and executive leaders, staff members and volunteers to identify needs and issues related to volunteer engagement. In addition, they fostered peer exchange and learnings through a community-wide symposium on volunteer engagement, seminars and reflection gatherings.

Phase II invested even more deeply in local organizations that demonstrated readiness to take their engagement practices to a new level. This phase kicked off with a half-day training on volunteer engagement trends and innovations, attended by 24 organizations. Participants were then invited to apply to be part of Phase II, which included in-depth training and support. Nine diverse organizations were then selected and encouraged to identify a strategy for accomplishing their mission through engaging volunteers. Each benefited from an orientation, a pre-project assessment, a full-day Summit on volunteer engagement, followed by seven months of team coaching as they implemented volunteer engagement innovations and infrastructure improvements. **Post-project evaluations demonstrate that all organizations measurably enhanced their volunteer engagement practices, learned new skills, developed new programs, engaged new volunteer leaders and increased their capacity to deliver services.**

Colorado Springs Osteopathic Foundation



Fueled by a desire to meaningfully help a few nonprofits to “move the needle,” the Foundation shifted from an annual granting cycle to, instead, inviting a small number of organizations to apply for multi-year grants. Among its earliest recipients of a three-year grant was CASA, Court Appointed Special Advocates of Colorado Springs, for a volunteer engagement model called “Peer Coordinator.”

The Peer Coordinator concept was to develop a higher level of volunteer opportunity within the organization, where experienced volunteers would mentor and support the new volunteers recruited to serve at CASA. *Through this model, CASA was able to exponentially expand its volunteer recruitment and its ability to support and supervise new volunteers. Ultimately, CASA staff and volunteers were able to serve many more abused and neglected children through this capacity building.* The model nurtured a deeper relationship building between the Peer Coordinators and the volunteers, thereby increasing retention, engagement and growth. It was a win-win for everyone especially CASA’s clients. Thanks to 28 Peer Coordinators, more abused or neglected children were served without having to exponentially increase CASA’s staff or budget.

Additionally, the Colorado Springs Osteopathic Foundation Board of Directors and members are more engaged in the nonprofits they have funded and those they are considering funding in the future. In addition to vetting and selecting the recipients of the grants, they are volunteering for short term projects at various nonprofit organizations.

Doris Ralston
MPA, Executive Director & CEO

SUCCESSFUL MODELS OF FUNDER INVESTMENT IN VOLUNTEER ENGAGEMENT

CASA



Volunteer engagement is a means to an end. It leverages a source of renewable energy (volunteers) to efficiently and effectively reach mission fulfillment. In working with CASA of Colorado Springs for 25 years, The Leighty Foundation has witnessed first hand the organization's dramatic evolution. Outcomes have included:

- Elevating the volunteer coordinator to a Manager of Volunteer Services placed her on the executive team where her input was critical.
- Revising the mission statement to include a reference to volunteers and their critical role in the accomplishment of our mission.
- Approving volunteer engagement as one of the organization's annual strategic planning goals.
- Placing volunteer engagement in all staff job descriptions and as performance indicators in their annual reviews.
- Creating a women's giving circle, of primarily Baby Boomer women, which donates more than \$80,000 annually.
- Creating a position of Peer Coordinator. These leadership volunteers were recruited from CASA's experienced volunteer pool. They now train and mentor every new volunteer.

Impact on mission fulfillment:

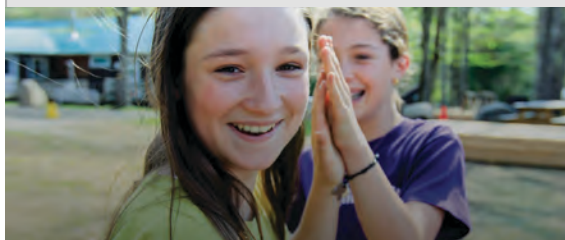
In 2012- 2013 when the peer coordinator project was implemented, CASA served 443 children with no peer level volunteers. In mid-year 2017, 578 children are being served with 28 peer coordinators. The projection is to serve over 600 children before fiscal year end June 30, 2017. The organization is on track to meet the goal of serving 900 children by year 2020-2021.

Overall, this strategy has been a cost-effective way to expand the volunteer pool of advocates and improve retention rates, as well as affording CASA with the opportunity to reach more children.

Under the leadership of key volunteers, a used clothing store was created where teens in foster care shop for clothes and accessories at no cost to them. Clothes are donated and collected by high school students. Foster teens staff the store gaining retail and customer service experience. The store is run solely by a team of millennial and foster teen volunteers, who have experienced their vision become a reality.

The above transformation has led to improved measurable outcomes, growth in diversity of our volunteer resources, and an increase in volunteerism at every level of the agency. The strategic utilization of volunteers has resulted in great progress toward providing an advocate for every abused and neglected child in the Pikes Peak Region through efficient and effective capacity building strategies.

New Hampshire Charitable Foundation



Offer more services with fewer resources is a common nonprofit motto. The New Hampshire Charitable Foundation, the state's community foundation, saw an opportunity to reframe this perspective by taking a look at the roles skills-based volunteers can play in nonprofit capacity building.

The High Impact Volunteer Engagement (HIVE) pilot was seeded by the New Hampshire Charitable Foundation as a unique initiative that was implemented with the expertise of two cross-sector partners. As part of the initiative, ten nonprofit organizations were selected to participate in a year-long training, coaching and support program to expand capacity through skills-based volunteer engagement. **The selected nonprofit organizations represented a broad range of issue areas and services: from support of victims of domestic and sexual violence to housing help for the homeless, to programs promoting art and culture.**

[The impact has been far-reaching. The HIVE pilot inspired nonprofits by giving them the means to think creatively about volunteer roles and responsibilities. It served as a catalyst to build momentum for wider organizational transformation.](#)

The ten teams shaped their nonprofits' transformation based on new ideas: that volunteers are equally invested today in the impact of their service, that they are as accountable as full-time staff, and that their contribution can be far greater than routine, administrative tasks. In fact, volunteers are a valuable resource for the leadership, direction and sustainability of any organization's endeavors.

RESOURCES

The literature of the nonprofit sector has ample materials related to volunteerism and volunteer engagement. It is lacking, however, in resources for funders who are interested in supporting effective volunteer engagement. While this is not meant to serve as an exhaustive list, the following organizations offer additional research and information.



The Leighty Foundation
leightyfoundation.org



Center for Nonprofit Excellence
cncoloradosprings.org



JFFixer Group
JFFixer.com



Grantmakers for Effective Organizations
geofunders.org



PACE: Philanthropy for Active Civic Engagement
Pacefunders.org



Exponent Philanthropy
exponentphilanthropy.org



Lilly Family School of Philanthropy at Indiana University
philanthropy.iupui.edu



Energize, Inc.
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America's Service Commissions
statecommissions.org



Council for Certification in Volunteer Administration
cvacert.org



