→ # Engaging Volunteers: A Comprehensive Literature Review

Acknowledgements

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Suggested Citation

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Table of Contents

Introduction

Volunteering brings out the best of America (AmeriCorps, n.d.–a). According to the most recent federal data, 23.2 percent of Americans or 60.7 million people formally volunteered with organizations between September 2020 and September 2021, serving an estimated 4.1 billion hours with an economic value of $122.9 billion (AmeriCorps, n.d.–b). In addition, nearly 51 percent of Americans or 124.7 million people informally volunteered by helping others (e.g., by exchanging favors with their neighbors) during that same period (AmeriCorps, n.d.–b). The data show that service to others continues to be a priority for millions of Americans, and organizations need to be ready to engage those who want to give back (AmeriCorps, n.d.–a).

In the context of formal volunteering, or volunteering through an organization, **volunteer engagement** traditionally refers to a broader strategy to leverage volunteers to accomplish an organization's mission. **Volunteer management** traditionally refers to organizational practices used to recruit and retain volunteers. Volunteer engagement spans many contexts in which volunteers mobilize, from large volunteer mobilization organizations (i.e., volunteer connector organizations such as Points of Light or United Way), to nonprofit organizations, to faith-based or community-based entities, to institutes of higher education. Volunteer management can also require vastly different practices depending on whether volunteers are episodic (such as those volunteering through an organization to respond to a crisis or volunteer for an event) compared to those who are continuing or permanent.

As an independent federal agency, AmeriCorps[1] plays a vital role in supporting the American culture of citizenship, service, and responsibility and is the nation's largest grantmaker in support of many forms of service and volunteering. AmeriCorps engages more than 5 million Americans in service through its AmeriCorps, AmeriCorps Seniors, and Volunteer Generation Fund (VGF) programs.

The VGF program, which was authorized by the Edward M. Kennedy Serve America Act in 2009, supports organizations in enhancing the impact of volunteers on critical community needs. Through grants to state service commissions and nonprofit organizations, VGF invests in volunteer management practices that increase volunteer recruitment and retention. To learn more about how VGF grants have been implemented and the outcomes of those grants in improving volunteer recruitment and retention, the AmeriCorps Office of Research and Evaluation contracted with ICF to conduct an evaluation of the VGF grant program based on the work of participating grantees awarded in fiscal year (FY)2020.

> ### A Note on Terminology
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> Recently, the term volunteer management (referring to practices to recruit and retain volunteers) has been replaced by volunteer engagement—reflecting a shift in the field from thinking about volunteers as needing to be "managed" to needing to be "engaged." Given that the term volunteer engagement also refers to a broader strategy to leverage volunteers to accomplish an organization's mission, this report uses the traditional definitions of the terms for the sake of clarity in distinguishing between these important concepts. Use of the term is not meant to further the perception that volunteers should be managed rather than engaged.

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[1] AmeriCorps is the operating name of the Corporation for National and Community Service, or CNCS.

As part of the evaluation of the VGF grant program, ICF conducted a comprehensive literature review in 2021 of volunteer management practices identified in external literature. Recent literature and research about volunteer management models and strategies were reviewed and the evidence (e.g., relationships to volunteer outcomes) that supports these models was examined. While there is exhaustive literature on the individual characteristics of volunteers and their relationship to volunteer outcomes, the literature on how organization-level factors affect volunteer outcomes is more limited, with fewer studies examining how volunteer recruitment and management practices expand and strengthen volunteering mechanisms, and even fewer of these studies taking place in the United States. The purpose of this literature review was to provide an overview of knowledge and the evidence base for volunteer management practices.

In 2023, an updated literature review was conducted that incorporates recent data on the effects of the coronavirus disease 2019 (COVID–19) pandemic on volunteerism in the United States as well as supplemental research to build upon the evidence base regarding volunteer management and engagement. This report presents the findings from this updated review.

The State of Volunteerism in the United States and Effects of the COVID–19 Pandemic

As has been broadly documented, the COVID–19 pandemic has had far-reaching effects on all aspects of American life—interrupting in-person participation across social sectors—which greatly affected volunteerism. According to the *2021 Current Population Survey Civic Engagement and Volunteering Supplement*, between 2019 and 2021, formal volunteering declined from 30 percent to 23.2 percent, a decrease of 7 percentage points. This represents the largest decline since the supplement was first administered in 2002, according to a research summary reflecting analysis completed by AmeriCorps (n.d.–b). Many factors may have contributed to the decline, including social distancing measures that complicated the ability of organizations to engage volunteers. Nevertheless, volunteers made important contributions to their communities during the pandemic, including supporting COVID–19 testing and vaccination, conducting wellness checks on isolated seniors, supporting food banks, assisting other public health efforts, and helping students stay on track in school (AmeriCorps, n.d.–b). In a survey conducted by Points of Light at the start of the pandemic, in May 2020, 73 percent of respondents believed that volunteering will be more important than ever after the pandemic and 95 percent said they will maintain their current level of involvement or do more to get involved and make a difference after the pandemic passes (Points of Light, 2020). Survey data suggest that the declines in volunteerism documented by the civic engagement and volunteering supplement may be temporary.

Meanwhile, despite declines in formal volunteering at the height of the pandemic there was a simultaneous increase in demand for services. In 2022, nearly two-thirds (64.4 percent) of nonprofits reported an increase in demand for their organizational services (Dietz & Grimm, 2023). Nearly half (46.8 percent) of nonprofit CEOs reported that recruiting sufficient volunteers was a "big problem" for their organization (Dietz & Grimm, 2023). Given these challenges, Dietz and Grimm (2023) argue that nonprofits reported being "more convinced of the benefits of volunteer engagement" than in the past, pointing to data showing increases in the percentage of nonprofit CEOs reporting that they believe "to a great extent" that volunteers allow the organization to provide more detailed attention to the people served (37 percent in 2019 vs. 65.6 percent in 2022) and that volunteers increase the organization's return on its resource investments (43 percent in 2019 vs. 68.4 percent in 2022).

As volunteer organizations look to reengage volunteers in a post-pandemic world, they should also consider the changes that were already taking place in volunteerism just before the pandemic. Hager and Brudney (2021) surveyed over 600 nonprofit organizations in 2019 to determine the status of volunteer management capacity at that time, and compared the results to those from a survey they administered two decades earlier. Their study provided evidence that the landscape of volunteerism had already begun to change prior to the pandemic in three major ways: (1) volunteers are more interested in episodic, short-term assignments; (2) electronic tools and social media are rearranging how organizations interact with volunteers; and (3) volunteers will be on the front lines for reestablishing trust and human interaction in a post-pandemic civil society and nonprofits will need to engage volunteers in innovative ways to meet this challenge (p. 18). This context sets the stage for the following review of volunteer management models and evidence on volunteer management practices.

Methodology

The following research questions guided the literature review:

- What does the current literature and research tell us about volunteer management models/volunteer programs and the evidence base behind them?
- What are volunteer management (including recruitment, support, and retention) models, and what are the characteristics and components of these models?
- What are the different volunteer recruitment strategies? What evidence or outcomes on volunteers support these strategies?
- What are the different volunteer management, support, and retention strategies? What evidence or outcomes on volunteers support these strategies?

Literature from 2010 to the present was scanned to identify any scholarly research on volunteer management models or approaches of volunteer management practices. In the literature scan, inclusion criteria were that literature be recent (2010–present) and include literature relevant to AmeriCorps, such as evaluations of AmeriCorps-funded programs that examine organization-level factors and their effects on volunteer outcomes.[2] External literature was identified using the EBSCO online library database, Google search, and the AmeriCorps Evidence Exchange. Recommendations and further evidence from practitioners were also included, and in this case, time restrictions were not imposed on literature included in the review.[3]

A 2018 literature review by Einolf (2018) identified evidence-based volunteer management strategies. While some of the same studies were included in this review, the inclusion criteria used for this review typically excluded older studies (prior to 2010). However, because the literature on empirically-supported strategies in

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[2] Literature relevant to AmeriCorps was included in this literature review because the purpose of the review is to guide an evaluation of AmeriCorps VGF grants. It is important to note that AmeriCorps service resembles volunteer activities but is distinct from volunteerism. See Maki, A., Dwyer, P. C., & Snyder, M. (2015). Understanding AmeriCorps service: Perspectives from psychological theory and research on volunteerism. *Analyses of Social Issues and Public Policy, 15*(1), 253–281.

[3] Searches were conducted using Google Scholar. A majority of article abstracts indicated that studies examined individual characteristics of volunteers and their relationships to volunteer outcomes and were thus excluded from our review. Additional resources were found on the AmeriCorps Evidence Exchange by reviewing publications in the CNCS focus area "Capacity Building." Finally, AmeriCorps, Points of Light, and the Association of Leaders in Volunteer Engagement (AL!VE) provided several additional resources for this review.

volunteer recruitment was scarce, three studies predating the years set for the inclusion criteria were kept in the review.[4] In total, this review includes theoretical and empirical work from 18 publications.

Literature on Service Enterprise, a program model for volunteer engagement and management often used by VGF grantees, was also sought out and reviewed. Other documents that include volunteer management best practices, including Volunteer Management Training for AmeriCorps VISTA grantees on the foundations of volunteer management, were also included.[5]

Finally, VGF grant applications for all 14 grants awarded during FY2020 were reviewed to learn about volunteer management models and practices used by VGF grantees as well as key focus areas of grantees. Exhibit 1 presents the list of FY2020 grantees.

Exhibit 1.—FY2020 VGF grantees

State	Commission	Federal Funding Amount
Florida	Volunteer Florida	$658,401
Illinois	Serve Illinois Commission	$378,522
Iowa	Iowa Commission on Volunteer Service (Volunteer Iowa)	$331,976
Kansas	Kansas Volunteer Commission	$172,176
Maine	Maine Commission for Community Service	$132,958
Massachusetts	Massachusetts Service Alliance	$352,173
Michigan	Michigan Community Service Commission	$740,937
Minnesota	Minnesota Commission on National and Community Service (ServeMN) with partner Minnesota Alliance for Volunteer Advancement (MAVA)	$266,000
Nevada	Nevada Volunteers	$216,810
New Hampshire	Volunteer NH	$360,109
New Jersey	New Jersey Commission on National Community Service (NJ Commission)	$250,860
North Carolina	North Carolina Commission on Volunteerism & Community Service (VolunteerNC)	$270,875
Utah	Utah Commission on Service & Volunteerism (UServeUtah)	$185,000
Wisconsin	Wisconsin National and Community Service Board (Serve Wisconsin)	$235,917

Note. ServeMN is the fiscal agent of the VGF grant and responsible for grant compliance, though it sub-granted all aspects of VGF grant implementation to MAVA. ServeMN and MAVA consider themselves grant partners.

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[4] Searches were conducted using Google Scholar and combinations of the terms "volunteer," "AmeriCorps," and "Corporation for National and Community Service" or "CNCS" with terms such as "management," "recruitment," "retention," "support," "engagement," or "satisfaction." A majority of article abstracts indicated that studies examined individual characteristics of volunteers and their relationships to volunteer outcomes and were thus excluded from our review. Additional resources were found on the AmeriCorps Evidence Exchange by reviewing publications in the CNCS focus area "Capacity Building." Finally, AmeriCorps provided several additional resources for this review.

[5] The foundations provided in this training are adapted from *Volunteer Management: All the Resources of the Community*, 3rd Edition (2011) by Steve McCurley and Rick Lynch.

Review Findings

The following sections present findings from the literature review. First, findings from a review of the FY2020 VGF grantee applications are presented, which describe volunteer management and engagement models and practices used by the VGF grantees. Next, volunteer management and engagement models discussed in the literature are presented—some of which are the same as those used by the FY2020 VGF grantees. Finally, research to understand how volunteer management strategies impact volunteer outcomes is discussed.

Volunteer Generation Fund Grantee Models and Practices

The FY2020 VGF grantees primarily set out to use program funds to support community-based entities on volunteer engagement and management efforts, including via training and capacity building to organizations in their state.

Based on the review of grantee applications, 10 of the 14 FY2020 VGF grantees described using a particular volunteer engagement and/or management model to support training and capacity building (see exhibit 2). Nine grantees described planning to use Service Enterprise, a widely used program to build organizational capacity and train community-based entities in volunteer engagement and management best practices (more details on this model are presented in the following section). One of those nine grantees described using both Service Enterprise and the Human Resources Management model, a theoretical model of implementation of volunteer management practices (it is discussed in more detail in the following section). One grantee cited the Stanford Pathways of Public Service and Civic Engagement model—which is not explicitly focused on volunteer management or engagement but on civic engagement more broadly.

Exhibit 2.—FY2020 VGF grantees

State	Grantee	Service Enterprise	Stanford Pathways	Human Resources Management	Not Specified
Florida	Volunteer Florida				✓
Illinois	Serve Illinois Commission	✓			
Iowa	Volunteer Iowa	✓			
Kansas	Kansas Volunteer Commission	✓			
Maine	Maine Commission for Community Service	✓			
Massachusetts	Massachusetts Service Alliance	✓			
Michigan	Michigan Community Service Commission				✓
Minnesota	ServeMN/MAVA	✓			

State	Grantee	Service Enterprise	Stanford Pathways	Human Resources Management	Not Specified
Nevada	Nevada Volunteers	✓		✓	
New Hampshire	Volunteer NH				✓
New Jersey	NJ Commission	✓			
North Carolina	VolunteerNC	✓			
Utah	UServeUtah		✓		
Wisconsin	Wisconsin National and Community Service Board				N/A
Total		9	1	1	3

Note. The Wisconsin National and Community Service Board is not providing volunteer management and engagement training or capacity-building services as part of this VGF grant but did so as part of their FY2020 VGF grant.

In addition to using VGF funds to strengthen volunteer recruitment and retention through training and capacity building, grantees implement additional approaches to support volunteerism and community engagement for community-based entities. These include enhancing mechanisms to leverage volunteerism in disaster or crisis response, developing networks of organizations and staff, creating online tools for volunteer recruitment and/or management, and advertising.

Volunteer Management in Crisis, Disaster, and COVID-19 Response. At least five grantees structured their VGF grant program model entirely or in part around supporting volunteer management in disaster or crisis response, including some grantees who specifically address the COVID-19 pandemic, a unique contextual factor for the FY2020 grantees.

Organizational Networks. Several grantees planned to use their VGF grants to support community-based entities in building relationships with other individuals and entities and to strengthen volunteer management through supporting coordination and collaboration among organizations. These grantees developed networks aimed at strengthening connections across stakeholders in the volunteerism space and facilitating opportunities for resource sharing and peer learning.

Volunteer Recruitment and Management Tools and Systems. Volunteer recruitment and management tools and systems (most commonly referred to in grantees' VGF applications as platforms or portals) function to connect organizations to the community, allow volunteers to find volunteer positions, facilitate volunteer training, allow volunteers to track hours, and/or facilitate other ways in which organizations can connect with and manage volunteers. At least 10 of the grantees' applications described creating or expanding volunteer platforms or portals. Some grantees also described providing training to organizations on how to use the management tools.

Advertising. Volunteer recruitment can also be targeted through other advertising and marketing efforts. In addition to developing or expanding a volunteer platform, at least four states are using VGF funds for additional marketing efforts to recruit volunteers. For example, Volunteer NH is using VGF funds to conduct an

outreach campaign that includes public service announcements, Google advertisements, and conducting outreach to organizations already registered on the state volunteer platform to update their information.

Specific Populations. Beyond strengthening and supporting volunteer recruitment and retention practices for all volunteers, several grantees' VGF applications include other approaches intended to focus on specific populations of volunteers in their states. Three grantees noted in their applications that they would use their grant to expand access to volunteer opportunities beyond populations that are currently serving as volunteers. At least eight grantees include a youth focus as part of their VGF-funded activities. Grantees engage youth through work with community-based youth organizations and schools to provide service-learning initiatives (e.g., courses, service-learning projects), engage youth in volunteer opportunities, create youth volunteer recognition programs and honors programs, and provide youth camps and retreats focused on volunteering. Two grantees include programs that market volunteer opportunities specifically to older adults. Three grantees referenced corporate volunteer programs to enhance corporate engagement with volunteerism. And two grantees cited focusing on recruitment of skills-based volunteers or individuals who can leverage their specialized skills and talents to strengthen the infrastructure of nonprofits.

Literature on Volunteer Management Models

Three volunteer management models were identified in the literature: the Human Resources Management model, Service Enterprise, and AmeriCorps's in-house model used for training VISTA members.[6] As documented in the previous section, both Human Resources Management and Service Enterprise were also cited by the FY2020 VGF grantees in their program applications. Details regarding each of these models are provided in this section.

The Human Resources Management Model

The Human Resources Management (HRM) model of volunteer management applies classic human resource management workplace practices to the volunteer work environment (Brudney & Meijs, 2014). According to a literature review of volunteer management practices by Einolf (2018), most literature from both academic and practitioner perspectives on volunteer management models focus on this model, which treats volunteers as unpaid employees.

HRM is considered a top-down, "business-based" approach, and many of the components of the model for managing volunteers are similar to those for managing employees in a company or other organization of paid employees. The characteristic components of the HRM model include successive, functional phases of planning, recruitment, orientation, training, supervision/monitoring, recognition, and separation; the recommended practices for volunteer management align with employee management.

This model is often discussed as having two different approaches to engaging in practices: 1) a universal or "one-size-fits-all" approach in which practices are meant to be applied to volunteer management across diverse contexts and organizations, regardless of the type of organization, and 2) a contingency approach, in

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[6] Another model, the Pathways of Public Service and Civic Engagement framework, developed by Stanford University, was also considered for inclusion as one state service commission is using this framework in their VGF grant to strengthen volunteerism in their state. Given that the focus of this framework is on civic engagement broadly for higher education institutions, not volunteer management and engagement, the framework was excluded from this review. For more information on this framework, please visit https://haas.stanford.edu/about/our-approach/pathways-public-service-and-civic-engagement#:~:text=The%20Pathways%20of%20Public%20Service,working%20toward%20the%20common%20good.

which some practices that are part of the HRM model should be applied depending on contextual factors such as the presence of paid staff and organization size.

Brudney and Meijs' (2014) review of volunteer management models determined that much of the literature on HRM models forwards a universalistic approach. Although empirical evidence is limited, the researchers argue that theoretically, contingency approaches to implementing the practices of HRM may be better for responding to the uniqueness of organizations, volunteers, and their relationships, particularly for situations in which volunteers do not perform the same or similar tasks as paid staff. These approaches focus on characteristics such as volunteer relationships with paid staff or organization goals to determine which practices might be most effective in these settings.

A quasi-experimental study of the AmeriCorps Volunteer Infrastructure Program (VIP) examined the effects of implementing volunteer management practices by analyzing differences in the volunteer management capacity of VIP and non-VIP programs (which did not implement any specific management practices) (JBS International, 2012). The VIP program model includes implementing many volunteer management practices recommended as part of HRM, including developing volunteer roles/position descriptions, developing systems for recruitment and placement, providing training and curriculum, providing supervision, developing and implementing recognition and reward systems, and clarifying and promoting the role of volunteers within the organization. Researchers examined the management capacity of VIP and non-VIP programs before and after these management practices were implemented by VIP programs. The researchers found that, compared to non-VIP programs, implementation of these volunteer management practices had a positive impact on the organizational capacity of VIP programs.

However, research on volunteers has shown that not all HRM practices are appropriate for volunteer management (Studer, 2016). In a study of the adaptation of HRM to volunteer management, Studer examined the extent to which HRM practices apply to volunteers, how unique volunteers are from paid staff, and how management can respond to this uniqueness. Studer's examination of HRM showed that several principles of the model do contribute toward effective volunteer management (e.g., a statistically significant relationship with a volunteer outcome), but that desired outcomes could be improved by focusing on aspects such as the relationship between the volunteer and the volunteer manager (e.g., through the application of psychological theories). Einolf (2018) notes that using the HRM model of volunteer management and other theoretically and empirically supported practices are not mutually exclusive, and that organizations can integrate all of these practices for effective volunteer administration.

Service Enterprise

Service Enterprise is a program model for strengthening nonprofit capacity through the fundamental and strategic use of volunteers (Association of Leaders in Volunteer Engagement [AL!VE], 2022). According to AL!VE, the operator of Service Enterprise, it is defined "an organization that strategically leverages volunteers and their skills to successfully deliver on its social mission" (AL!VE, 2022, p. 2). Service Enterprise Administrator Kayla Paulson (2023) described it as a "catalyst for fundamental organizational culture change," noting that it "brings together a cross-functional team that is committed to your organization's mission and maximizing the human capital of the organization." Service Enterprise focuses on volunteer engagement, though it touches on specific volunteer management practices (e.g., onboarding volunteers).

Exhibit 3 (reprinted with permission from AL!VE) provides an overview of 12 key characteristics of organizations classified as Service Enterprises, which fall under 3 domains.

EXHIBIT 3.—Service Enterprise domains and characteristics

Establishing the Foundation	Best Practices	Impact & Outcomes
Funding & Resource Allocation Provision of the financial, human, space, & material tools necessary for the engagement of volunteers, as well as the willingness to seek additional support as needed	**Recruitment & Cultivation** Engaging individuals & groups to serve your organization is an ongoing cultivation process. Recruitment should be targeted to assure a diverse mix of community members with the skills, interests, & abilities to further your mission	**Collaboration** Being a part of your community is vital to the work & services of nonprofit & public sector organizations. Collaborative undertakings with other organizations, your constituents, & your volunteers build relationships & sharpen the focus of service organizations
Technology The broad-based utilization of technology to facilitate all aspects of volunteer engagement, including record-keeping, communication, & service options	**Onboarding** Providing a smooth pathway to service through careful screening, preparation, & guidance that includes both community members & staff involvement	**Communication** Effective communication takes many forms & operates through an increasingly wide & diverse array of channels including formal & informal means, print & social media to send information to external & internal groups
Leadership Involvement Executive & board leadership demonstrate through actions their commitment to community involvement & the engagement of volunteers as a key strategy to achieve the organization's mission	**Training** Education & skill development, as well as the knowledge of organizational parameters & boundaries, are critical to ensure that both volunteers & staff are equipped to perform their work & to work effectively together	**Growth & Change** Vibrant, exciting organizations seek ways to improve services, cultivate leaders, continuously seed new ways of thinking, & create new platforms for action & problem-solving. Staying on the cutting edge of industry practices motivates staff, whether paid or unpaid
Planning Thoughtful, comprehensive preparations for volunteer & community engagement based on established principles & practices of effective management	**Supervision & Support** Assures that oversight & support are consistently provided to volunteers & community partners to ensure they are empowered to succeed, & to feel valued & appreciated	**Tracking & Evaluation** Assessing the degree to which an organization monitors progress toward institutional goals & the performance of volunteers, staff, & partners in reaching these objectives

The Service Enterprise model involves providing training, support, and resources to nonprofits either through local training hubs or national trainers. As of January 2024, there were 19 local training Service Enterprise Hubs or national trainers across the United States (AL!VE, 2024). As of October 2023, 775 organizations had become certified as Service Enterprises since 2010 (K. Paulson, personal communication, October 13, 2023).

The Service Enterprise program training model involves the following seven-part process (AL!VE, 2022):

1. Organizations complete an application to the Service Enterprise program.

2. Participants complete a 2-hour orientation that provides an overview of the basic concepts of Service Enterprise (such as those presented in exhibit 3).

3. Participants complete a diagnostic, an online assessment tool that measures the degree to which an organization is a Service Enterprise.

4. Participants complete a diagnostic debrief with their hub, which is used to review the results of the diagnostic and discuss next steps.

5. Participants complete 12–16 hours of classroom training with sessions providing participants with tools to help them operate as a Service Enterprise. Training topics include building board support, determining the return on volunteer investment, defining strategic roles of volunteers, and identifying

ways to institutionalize the changes. Alongside and following the training, participants also receive coaching or consulting by the Service Enterprise Hub.

6. After completing training and coaching, participants have the opportunity to apply for a Service Enterprise Accreditation. The accreditation process involves a site visit to the organization by a representative from the hub to observe volunteer engagement practices and/or interview those involved. In addition, the organization applying for certification will provide evidence that it is achieving excellence in nine of the twelve characteristics. Accreditation remains valid for 3 years and then organizations must renew their accreditation.

7. Organizations work toward continuous improvement, an ongoing part of the process.

Research has been used to drive the development of the Service Enterprise program since its inception. In 2009, the TCC Group analyzed results from 652 nonprofit organizations that completed the Core Capacity Assessment Tool (CCAT).[7] The CCAT is a 145-question online survey to measure nonprofit organizational effectiveness across 4 core capacities (i.e., leadership, adaptability, management, technical) and their organizational culture (TCC Group, 2009).[8] Analysts created five subgroups based on the number of volunteers engaged by the organization and scores on the volunteer management scale portion of the CCAT. One of the subgroups, which represented eleven percent of the total number of organizations that completed the CCAT, was labeled as a Strong Service Model (SSM) in that they had equal to or greater than 50 volunteers and scored equal to or greater than 240 on the volunteer management scale of the CCAT. Compared to the other four subgroups, the SSM organizations had significantly stronger measures for all core organizational capacities; led and managed their organizations better; were significantly more adaptable, sustainable, and better resourced; and had stronger human resource management practices (TCC Group, 2009). Moreover, any organizations that engaged 10–50 volunteers were as statistically "effective" as those that did not engage volunteers, but at half the median annual budget (TCC Group, 2009). Ultimately, those organizations that represented the SSM in the TCC study we referred to as Service Enterprises (AL!VE, 2022).

Building from the TCC study, Deloitte (2010) conducted interviews with eight high-functioning nonprofit organizations (including six organizations identified by the TCC Group as falling into the SSM category) to validate and refine the definition of a nonprofit Service Enterprise. Their study found the following key findings of Service Enterprises: (1) volunteers enabled the organizations to achieve their mission and key objectives; (2) nonprofits provided significantly more services with fewer resources by effectively using their volunteers; and (3) strong volunteer management programs used by these organizations included recruiting, setting expectations of volunteers, training, matching volunteers with opportunities, and retention (Deloitte, 2010, p. 4).

Following this research to build out an understanding of Service Enterprises, California Volunteers, the state service commission from California, applied for a VGF grant from AmeriCorps in fall 2010 to create the California Volunteers Service Enterprise Initiative, which piloted a model for supporting nonprofits in becoming Service Enterprises (AL!VE, 2023b). In June 2012, California Volunteers partnered with Points of Light and

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[7] The CCAT tool is distinct from the Service Enterprise Diagnostic (SED) that was eventually used as part of the Service Enterprise program. That said, in the early development stages of the SED, researchers who had been involved in analyzing CCAT data helped with the development of the SED. As a result, early versions of the SED contained some questions from the CCAT tool, however most of those questions were related to demographics. Eventually, however, these questions were dropped (S. J. Rehnborg, personal communication, October 11, 2023).

[8] TCC Group referred to the instrument as being valid and reliable but did not provide findings on the validity and reliability measures.

Reimagining Service to support the second year of California Volunteers Service Enterprise Initiative implementation. This partnership yielded a revised curriculum, research-based assessment tools, and other resources (AL!VE, 2023b). The following year, in fall 2013, Points of Light scaled the pilot initiative to 11 states (17 Service Enterprise Hubs with over 60 organizations certified as Service Enterprises).

With a larger data set available through Service Enterprise from the pilot initiative, Points of Light, Algorhythm, and the RGK Center for Philanthropy and Community Service at the University of Texas at Austin updated the set of characteristics of Service Enterprises in 2014 (AL!VE, 2022). Between 2014 and 2021, the pilot project concluded and Points of Light scaled the Service Enterprise program to 31 states (certifying over 640 organizations) (AL!VE, 2023b.).

In 2021–2022, Points of Light and the RGK Center revised the Service Enterprise Diagnostic—renamed as the Index of Volunteer Engagement—as well as the characteristics of Service Enterprises (AL!VE, 2022). The resulting Service Enterprise model is what was used at the time of this report's publication by AL!VE, the new Service Enterprise program licensee as of October 2022 (AL!VE, 2023c).

AmeriCorps VISTA In-Service Training Adapted Model

AmeriCorps VISTA members are often tasked with volunteer management in their positions. AmeriCorps offers a VISTA campus for members that includes in-service training modules on volunteer management.

The Index of Volunteer Engagement

The Index of Volunteer Engagement is presently 77 assessment statements that correspond to the 3 domains and 12 characteristics of the Service Enterprise model. While the latest iteration of the tool reflects the newest model of Service Enterprise, the origins of the tool stemmed from work commissioned by the CNCS through a training and technical assistance contract with ETR Associates in the early 2000s (Rehnborn, 2023). ETR Associates subcontracted to researchers from the University of Texas at Austin (UT Austin) to develop a scientifically valid, reliable, and efficient evaluation tool for national and community service programs and other nonprofit and public sector organizations to help them self-assess their capacity to effectively engage volunteers and/or national service members. The tool was revised multiple times and used for different ends.

Researchers conducted significant psychometric testing on the instrument initially and throughout its revision process. In 2019, the tool moved into a new development phase when UT Austin began a 3-year process for revising the instrument, which involved focus groups of key practitioners, Service Enterprise coaches and trainers, and Points of Light staff. This process led to updates that reflected new methods of delivering service accelerated by the pandemic, changes in organizational uses of technology and social media, and concerns about diversity and inclusion (Rehnborn, 2023).

The volunteer management framework used in the training is adapted from McCurley and Lynch's (2006) model of the volunteer management cycle.[9]

McCurley and Lynch's (2006) book envisioned volunteer management as a means to effectively utilize community resources and provided in-depth information on the multidimensional landscape of volunteering and a guiding framework for organizations to navigate the needs of volunteers with the overall goal of retention. Acknowledging the differences in volunteer motivation, organization infrastructure, and the needs of those served by organization volunteers, McCurley and Lynch emphasized the need to organize and tailor a volunteer management style that fits the culture of the organization.

EXHIBIT 4.—Volunteer management cycle

While specific descriptions of each activity and considerations according to the organizational settings were provided in the volunteer management framework, generally the approach aligned to the organization, supports, and processes required to recruit and retain paid staff in the workplace (which is related to the HRM model discussed previously). Expanding upon a typical HRM approach, the framework contends that in order for volunteer involvement to be effective, the organization must have adequate systems in place to determine volunteer needs, identify ideal volunteers, and create motivational supports for volunteers (McCurley & Lynch, 2006, p. 22). The framework also necessitates that volunteer managers acknowledge the lack of pay when navigating a management system similar to typical practices for paid employees; in lieu of considering wages/salaries, McCurley and Lynch suggest that volunteer managers consider the motivations of each volunteer (e.g., altruism, skill building, family experiences) and how they can align with the needs of the organization throughout the management cycle and volunteer tenure (p. 13).

The key activities in the management cycle are presented in exhibit 4 and described as follows:

1. **Plan.** Research trends in the use of volunteers; identify clear volunteer needs; establish clear internal processes for how volunteers will be guided, evaluated, and recognized.

2. **Recruit.** Create position descriptions that identify qualifications, activities, benefits, time commitment, and other expectations. Develop a targeted recruitment plan and market volunteer opportunities to targeted volunteers.

3. **Screen and Match.** Use volunteer applications to gather information needed to place volunteers; use a standard process to determine whether volunteers are a good fit; interview volunteers and match volunteers with opportunities that fit their motivations, interest, and skills.

4. **Train and Support.** Orient volunteers to the organization and train volunteers on specific tasks they need to be able to perform. Ensure volunteers have ongoing guidance and support and create ways to recognize volunteer efforts. Train staff on how to effectively work with volunteers.

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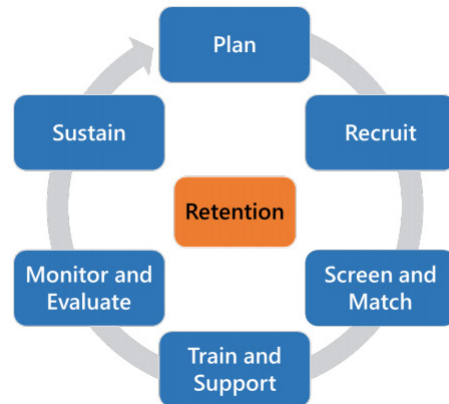
[9] The written training materials did not include evidence associated with each of these practices.

5. **Monitor and Evaluate.** Implement recordkeeping and communication to assess how things are going. Gather input on volunteer performance and outcomes and provide feedback to volunteers. Implement a process for reviewing and responding to input from volunteers.

6. **Sustain.** Identify ways to keep volunteers involved, and secure staff or volunteer resources to continue the program with revised and documented processes, policies, procedures, communication systems, and evaluation data.

The framework is intentionally cyclical because the key activities often interact with each other in a nonlinear way, requiring regular attention to how alterations to one activity may affect others (e.g., addition of new volunteers, areas of volunteer usage). To implement and support each of these key activities, upper management and staff in contact with volunteers must be involved throughout the management process, suggesting a top-down approach, while maintaining the framework's dedication to adequately recruit, match, and train volunteers in order to maintain their motivation to continue volunteering (McCurley & Lynch, 2006, p. 22).

This dedication can be seen through the framework's description of how to manage or supervise volunteers in a style that maximizes their performance. One of the main tenets of effective volunteer management focuses on empowering volunteers to become more autonomous, allowing them to decide how they will achieve results for which they are responsible (McCurley & Lynch, 2006, p. 97). Through this approach, volunteer management becomes less controlling on the part of volunteer supervisors, advances the capability of volunteers, and aims to sustain their motivation to produce good results given the added element of their self-direction. In addition to increasing the self-motivated interest in volunteer work, this approach allows supervisors to focus on identifying overarching strategies to improve volunteer involvement as opposed to managing the day-to-day operations of volunteers (McCurley & Lynch, 2006, p. 97). At a high level, McCurley and Lynch emphasize that effective volunteer management includes cyclical engagement between the six key activities of the management cycle and maintains a mission to retain motivated volunteers through a supportive supervisory framework, similar to a healthy workplace environment.

Evidence on Volunteer Management Practices

The 2018 literature review by Einolf (2018) identifies evidence-based volunteer management practices. For this external literature review, we examined those empirical articles included in Einolf (2018) and published in the past 11 years (2010–present) as well as original research published since Einolf (2018) on volunteer management practices.

Engagement

The bulk of the research found on volunteer engagement relevant to research and evaluation related to Service Enterprise. Given the widespread use of Service Enterprise across the United States, evaluations of this program present some evidence about how the volunteer engagement training program affects organizational outcomes.

According to AL!VE (2022), nonprofits that become Service Enterprises "more effectively serve the community through increased organizational capacity; improve networking opportunities (with people who are enthusiastic about an organization's mission and value); realize operational and infrastructure efficiencies through volunteer engagement; and recognize opportunities to grow organizational revenues by leveraging the time and talent of paid staff and volunteers alike in new and creative ways" (p. 7).

Based on a 2013 Points of Light blog post, for every $1 nonprofits invest in *effective* volunteer engagement (such as by following a Service Enterprise model), they can expect up to $6 in return (Thompson, 2013). Points of Light described how one organization, Catholic Big Brothers Big Sisters in Los Angeles County, California, said that Service Enterprise helped staff at the organization realize new ways to engage volunteers. The organization credited Service Enterprise with increasing its network of young, skills-based volunteers by about 20 percent (Thompson, 2013).

Points of Light has conducted at least three evaluations of Service Enterprise since 2017.[10] The most recent findings, from a 2021 evaluation report (Foltz et al.) are presented here (a review of findings from past reports revealed that the trends across the reports are generally consistent). Data sources for the 2021 evaluation included survey data, focus groups, case studies, and a literature review. This descriptive outcomes-based evaluation primarily relied on self-reported outcomes from nonprofit organization staff who had participated in the Service Enterprise program. There was no counterfactual included in the design, so the findings are descriptive and not indicative of an impact analysis of Service Enterprise.

Key findings are as follows:

- Survey respondents were highly satisfied with the Service Enterprise program, with 88 percent believing it was worth the investment and 90 percent recommending the program to others. In addition, 91 percent of respondents reported that their organization was better equipped to engage volunteers at their organization. Qualitative data supported these findings, with participants noting both the intraorganizational and interorganizational value of the program.
- Respondents viewed themselves as more routine and advanced users of Service Enterprise strategies than others in their organization.
- Survey data show that Service Enterprise is effective in "developing individual ability to affect change related to volunteer engagement, especially in how organizations engage volunteers and the processes in place to support volunteer engagement" (p. 3)
- A majority of survey respondents reported that Service Enterprise was "effective in increasing their organization's ability to implement consistent volunteer engagement processes, invest more resources in volunteer engagement, institutionalize best practices beyond a single leader, and measure return on volunteer investment" (p. 3).
- Survey data suggest that Service Enterprise "has at least some impact on establishing partnerships that improve services (67 percent) and increase services (65 percent)" (p. 3).
- At the beneficiary level, survey data suggest that Service Enterprise "was at least somewhat effective in increasing most respondents' ability to extend reach into targeted communities (65 percent), offer deeper services to beneficiaries (61 percent), offer more types of services to beneficiaries (58 percent) and serve more beneficiaries (57 percent)" (p. 3). Open ended responses suggested that Service Enterprise "helped organizations to be nimbler in responding to COVID-19 and extended reach into new communities" (p. 3).
- Using pre-test and post-test assessments, the evaluation found perceived growth on all Service Enterprise characteristics, with the greatest magnitude of perceived change on effective training, tracking and evaluation as well as planning and development (p. 4). Further, approximately three-fourths of respondents saw their organization as "very to extremely effective in demonstrating an executive commitment to volunteer engagement; matching volunteers to appropriate positions, clarifying roles, and orienting and supporting them throughout their service tenure; and developing a strategy and infrastructure for mission-driven volunteer engagement" (p. 4).

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[10] The evaluation reports are not public-facing but were provided to ICF by staff from Points of Light.

- Service Enterprise was found to be "very or extremely helpful in shaping the volunteer engagement response to COVID-19 by 42 percent of survey respondents and moderately so by about 80 percent" (p. 4).

The Points of Light evaluation therefore provides evidence that participation in Service Enterprise programming and organizational alignment with the Service Enterprise characteristics may enable organizations to better engage volunteers, institutionalize best practices, and measure return on investment.

Recruitment

The literature search yielded no empirical studies on the relationship between an organization's volunteer recruitment practices and an individual's actual decision to volunteer. The studies included in this review that have examined recruitment practices for volunteer organizations include presenting marketing materials for hypothetical volunteer organizations to assess whether participants would join the organization using proxy measures for recruitment. These measures include perceptions of the organization as being attractive to volunteer for and interest in volunteering for the organization. The subsequent sections list evidence-based recruitment practices and the findings from studies supporting each of them.

Communicate the Organization's Investment. A series of experiments conducted by Boezeman and Ellemers (2008) in the Netherlands demonstrated that using marketing materials to convey that an organization invests in—and cares for—its volunteers impacted participants' perceptions of the volunteer organization's attractiveness. Researchers created leaflets that did or did not describe organizations that would provide support for its volunteers. Results indicated that marketing materials intended to induce participants' anticipation of respect as a volunteer led to participants' perceptions that volunteering for the organization would be attractive. The researchers suggested that based on these findings, volunteer organizations may be able to effectively recruit volunteers by communicating both task-oriented and emotion-oriented support for volunteers in recruitment materials.

Align Recruitment Messaging to Volunteering Motives. Two studies listed in Einolf's (2018) review of volunteer management practices found that matching recruitment messages to potential volunteers' motives made them more likely to volunteer with a hypothetical organization. In the first experiment, Clary et al. (1994) assessed participants for their self-rated importance of reasons to volunteer; after these assessments were subtly scored, participants were presented with videotaped public service advertisements that either matched or didn't match what they indicated they valued in their assessment as reasons to volunteer. Participants then answered questions about the advertisement's appeal, such as how appealing, effective, influential, and good it was. Overall, participants who saw matched and mismatched messages did not differ in their perceptions of the advertisement messages themselves, but there was a positive, significant difference in the number of participants in the matched condition who said they would volunteer for the organization compared to the mismatched condition.[11]

In the second study, Clary et al. (1998) developed and tested an inventory of volunteer motivations and, through a series of studies, examined whether matching these motivations to volunteer opportunity messaging predicted participants' evaluation of the message's effectiveness to get them to volunteer with a hypothetical organization. Volunteers were more likely to say that the message was effective at motivating them to volunteer when the message matched their motivations, as measured by the inventory.

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[11] This research did not include examining actual increases in volunteers based on the advertisements.

Explicitly Invite Different Populations of Interest. Another practice for recruiting volunteers involves explicitly signifying a desire to recruit from specific populations in recruitment materials. In one experiment conducted in the Netherlands, Boezeman and Ellemers (2014) tested emphasizing the need for young male volunteers at a childcare center, compared to a control condition (that did not emphasize the need for young male volunteers) on a group of young male participants.[12] Both recruitment materials noted that current staff were mostly comprised of older women; however, the experimental condition noted that young male volunteers would complement women as important role models to the children. Emphasizing this need for young men in recruiting materials caused more young male participants to perceive the hypothetical nonprofit organization as an attractive place to work and to be more inclined to indicate their interest to volunteer for the organization. The researchers argued that these findings showed that potential volunteers of a different demographic (in this study, young males) were more interested in joining an organization when its recruitment messages emphasized that the demographic groups have a unique added value for the organization, and that volunteer organizations may want to consider using such messaging in recruitment materials.

Retention

The research on volunteer management shows several different organization-level factors that are associated with volunteer outcomes; those factors associated with positive volunteer outcomes may promote the likelihood that volunteers remain with an organization. In the following subsections, volunteer retention practices and how these practices are associated with volunteer outcomes is discussed.

While one goal of prior research on volunteerism has been to understand volunteer retention, we only identified two studies that met our inclusion criteria: focused on the impacts of organization-level factors (and not individual characteristics of volunteers) and used a longitudinal survey design to measure the relationship between an organization's management practices and participant retention (McBride & Lee, 2012; Tang et al., 2010). Many of the studies described below used proxy measures to understand retention through questions about volunteer intent to remain, volunteer intent to quit, volunteer engagement, and volunteer satisfaction.[13,14] Therefore, studies that used one or more of these variables as volunteer outcome variables of interest have been included in our evidence base of practices described below.

Match Volunteers to Roles Based on Interest. Matching volunteers to their roles based on career goals has been empirically supported as a best practice for volunteer management. In a longitudinal examination of AmeriCorps members, McBride and Lee (2012) found that members who perceived their AmeriCorps activities to be aligned with their long-term career or job interests were more likely to complete their service term. Based on these findings, the researchers suggested that organizations survey new volunteers to understand their interests at the beginning of the volunteer-organization relationship to best match volunteers with roles based on those interests.

Provide Task-Oriented and Emotional Support. Several studies on the impact of organizational support show that volunteers' perceptions of both task-oriented (i.e., concrete forms of support to assist volunteers during the performance of volunteer work) and emotion-oriented organizational support (i.e., forms of support that elicit positive feelings and are not already included among task-oriented supports) were related to

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[12] This study has not been published. Details were obtained via email with Dr. Boezeman.
[13] Einolf (2018) provides a brief review of correlations among several of these variables, including the correlation between satisfaction and intent to remain.
[14] An evaluation of the AmeriCorps Foster Grandparent and Senior Companion programs showed that dissatisfaction drives members to leave programs.

positive volunteer outcomes. In an examination of volunteers' general perceptions of task-oriented and emotion-oriented organization support by a wildlife charity in the United Kingdom, Alfes et al. (2016) discovered that volunteers' perceptions of each type of support equally enhanced engagement with their voluntary work. This, in turn, was positively correlated with volunteers' happiness and perceived social worth (or how one sees oneself as valued in interpersonal relationships) and negatively correlated with volunteers' intent to leave.

Clearly Define Roles. One practice for volunteer management is to clearly define volunteers' roles. A study by Allen and Mueller (2013) investigated how feelings of burnout by volunteers at an animal shelter can help explain volunteers' intention to quit. Role ambiguity, which was used as one of the antecedents to burnout, was found to be related to feelings of burnout and increased endorsement of intentions to quit. Based on these findings, the researchers suggest using practices such as forming written guidelines formally outlining volunteers' roles to decrease the likelihood that volunteers will feel burnout and therefore want to quit.

Provide Training and Learning Opportunities. Another practice for volunteer management is providing orientation and training for volunteers, which not only prepares volunteers for their role but has been correlated with volunteers' sense of belonging in volunteer organizations. In a longitudinal examination of older adult volunteers at 14 programs, Tang et al. (2010) discovered that those volunteers who felt they had adequate training and support from their organization were more likely to stay. In another study conducted by Huynh et al. (2012) in Australia, volunteer access to training provided by the organization related to volunteers' feelings of connectedness, defined as a positive emotional sense of well-being that results from a strong sense of belonging with other workers and the recipients of one's service, which correlated with positive volunteer outcomes including volunteer satisfaction and determination to continue. And in another study by Newton et al. (2014) of more than two thousand volunteers from five nonprofit organizations in Australia showed that volunteer perceptions of learning and development opportunities are significantly related to organizational commitment (feeling a strong sense of belonging to an organization) and an intention to stay in the organization.

Encourage Volunteers to Voice their Opinions. Research has also shown that volunteers who perceive that they can provide input into volunteer decision-making processes is associated with positive volunteer outcomes. Allen and Mueller's (2013) study of volunteers at an animal shelter showed how a lack of voice, or the lack of ability to provide input in decision-making processes is associated with greater feelings of burnout (through depleting volunteers' cognitive and emotional resources); burnout was associated with an increased likelihood to endorse an intention to quit volunteering. According to the researchers, an implication of these findings is that volunteer organizations that promote ways for volunteers to voice their opinions to leadership may promote retention and mitigate any intentions of quitting.

Promote Autonomy Within the Organization. Some studies have found that volunteer autonomy and decision-making are related to volunteer service completion and retention. In the longitudinal examination of AmeriCorps members conducted by McBride and Lee (2012), researchers found that members who were highly involved in planning volunteer service activities were more likely to complete their service term. In a recent survey of volunteers in China by Cho et al. (2020), volunteer perceptions of empowerment (ability to engage in leadership opportunities) and schedule flexibility (ability to be flexible with volunteering hours) both related positively to volunteer satisfaction and intent to continue volunteering. Another survey of active volunteers with a large volunteer connector organization by Dwyer et al. (2013) found that volunteers were more satisfied when their volunteer team leaders involved them in decisions, although this was not linked to volunteer retention measures. These studies show that for volunteers, decision-making correlates to

measures of retention and that volunteer management practices that promote volunteer autonomy could promote volunteer retention.

Facilitate Relationship Building with Others in the Organization. Research has shown a positive correlation between volunteer relationships with their peers, mentors, and supervisors, and other positive volunteer outcomes (e.g., intent to remain, satisfaction). In a study by Garner and Garner (2011), volunteers' self-reported satisfaction with integration into the organization—or how happy volunteers were with the relationships they formed as a result of their volunteer work—was positively related to their intention to remain. In the longitudinal examination of AmeriCorps members by McBride and Lee (2012), researchers found that members who developed a relationship with a mentor were more likely to complete their service term. In the study by Huynh et al. (2012), volunteers' access to social support related to volunteers' feelings of connectedness, which was also correlated with positive volunteer outcomes including volunteer satisfaction and determination to continue. Another study by Nencini et al. (2016) of volunteers at four different nonprofit organizations in Italy showed that relational bonds created with other volunteers in an organization have an important role in sustaining motivation and volunteer retention. Therefore, to improve the retention rate of volunteers, the researchers across these studies have suggested that organizations promote activities that reinforce bonds among volunteers and between volunteers and management.

Provide Feedback and Recognition. Research shows that volunteers who perceive that their organizations provide them with feedback and show them appreciation are more likely to endorse an intent to continue volunteering with an organization. In the study by Cho et al. (2020) of street parade volunteers, volunteers' responses to survey items showed that rewards and recognition positively and significantly related to volunteer satisfaction and intent to continue volunteering. In the study by Huynh et al. (2012), volunteers who received performance feedback were associated with a greater sense of connection to the organization; connection to the organization was associated with volunteer satisfaction and determination to continue volunteering. Huynh et al. (2012) argue that volunteer managers should support individual volunteers through co-volunteer and supervisor support in order to promote connectedness in the workplace, which may then lead to positive volunteer outcomes.

Conclusion

While there is scholarly literature that supports specific volunteer engagement, recruitment, and retention practices, we identified very few research or evaluation studies that are randomized controlled trials or have a quasi-experimental design. Additionally, we were only able to identify a limited number of evaluation studies of AmeriCorps programs that include different recruitment and retention practices. Nevertheless, volunteer management practices such as matching volunteers to roles based on interest, supporting volunteers, and providing training opportunities are positively associated with retention and other positive volunteer outcomes (e.g., volunteers' happiness). And volunteer engagement practices promoted by Service Enterprise may enable organizations to better leverage the use of volunteers, institutionalize best practices, and measure return on investment. Additional research and evaluation efforts measuring the effects of volunteer management practices on volunteer outcomes will be helpful as volunteer organizations work to reengage volunteers in a post-pandemic world.

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