

## ABSTRACT

*This study explores several key senior volunteerism policy issues that need to be addressed from a local perspective in order to meet the challenges of the twenty-first century. Using inputs from a national survey of Voluntary Action Centers, prominent volunteer agencies in the United States, this study examines the impact of the national economy on senior volunteerism, the status of funding, the relationship between local senior volunteerism and employment, the role of risk management, and the affect of an aging society on senior volunteerism.*

# Senior Volunteerism Policies at the Local Level: Adaptation and Leadership in the 21st Century

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## THE ISSUE

Senior volunteerism has played an influential role in the development and provision of services to older persons residing in communities throughout the United States. Senior volunteers have served young and old in a variety of local settings: civic organizations and government, schools, religious institutions, hospitals, the military, and various rural and urban associations. Senior volunteer efforts have been instrumental in facilitating many programs on the local level, including senior centers, nutrition projects, recreational activities, health programs, advocacy and legal efforts (Ellis & Noyes, 1990; U.S. Senate, 1992; Van Til, 1988).

As we enter the twenty-first century, we find that senior volunteerism at the local level is changing. Policies which have guided the development of senior volunteerism in the past are not necessarily applicable in today's society. Local volunteer policies and programs which were developed in conjunction with historical

events must again respond to economic, demographic, and social changes. Senior volunteerism is faced with the challenge of adapting local programs to societal pressures while maintaining a steady course of leadership into the twenty-first century (Independent Sector, 1990; Kershner & Butler, 1988; Wilson, 1990).

The purpose of this study is to explore several key policy questions that need to be addressed from a local perspective in order to meet the challenge of adaptation and leadership in the twenty-first century. Input was sought from local level senior volunteer programs regarding the current and future status of local level volunteerism. The local programs selected for this study were the Voluntary Action Centers, an informal association of prominent national volunteer agencies in the United States.

Key questions to be explored are:

1. What is the impact of the national economy on senior volunteerism at the local level?

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2. What is the status of funding of local senior volunteer programs?
3. What is the relationship between local senior volunteerism and employment?
4. What role does risk management play in local senior volunteerism?
5. How does an aging society affect senior volunteerism on the local level?

This study explores these questions as one step toward developing policies that could prove helpful to local level senior volunteer programs functioning in a constantly changing environment.

## BACKGROUND

Each of these five policy questions has been considered in past studies of volunteerism. These studies have presented information and insights into how these five issues have affected volunteer organizations, the actions they have taken, and potential future volunteer policy options. We review past findings on these critical questions here in order to provide a context for the current research, conducted for this study. These same five issues are later reviewed regarding our research findings.

### *1. What is the impact of the national economy on senior volunteerism on the local level?*

The downturn and continuing uncertain economic situation in the U.S. is having an impact on human service agencies. Volunteer programs report being asked to manage with fewer resources despite greater needs. They have less financial support, increased client loads, a heightened demand for services and increased costs such as insurance and salaries.

In addition to providing services to ongoing client cases, agencies are confronted with new clients seeking assistance due to job layoffs and loss of benefits (Kouri, 1990). Unemployment has extended to white collar and middle management employees who are entering the ranks of the formerly employed. Ironically, many of these workers had been volunteers and donors in the past.

Demands on all agencies are expected to become even greater when the full impact of lay-offs is felt and if the economic downturn should continue (King, 1992). Often volunteer agencies are being asked to meet the newly emerging needs resulting from limited resources and to pick up the slack not met by government or other sources of aid.

### *2. What is the status of funding of local senior volunteer programs?*

When resources for aging activities are tight, competition can occur on the local level between applicants for the same funds. Old and new senior volunteer programs may find themselves opposing each other in the quest for limited dollars. Senior volunteer programs may receive funding, but not necessarily for the amount requested. Conflict may occur within agencies as aging programs vie with other programs for a share of an agency's budget.

Local agencies which cooperate during economically strong times may no longer afford such relationships. The corporate sector which has supported volunteer programs must reevaluate their return on investments; senior volunteer programs cannot assume that past donations will be renewed (King, 1992).

Policy guidelines for future funding of voluntary agencies have been suggested by the Independent Sector, a national coalition of 650 foundations, corporations and national voluntary organizations: (1) do not allow government to transfer government responsibilities to voluntary organizations; (2) maintain and strengthen tax incentives for charitable giving; (3) do not impose new taxes on nonprofit organizations but remove the existing two percent excise tax on foundations; (4) stimulate development of hundreds of more effective voluntary action centers (O'Connell and O'Connell, 1989). The Independent Sector, which comprises 6% of national income and spends \$250 billion a year, maintains that these guidelines could affect society's needs and volunteerism's goals.

### *3. What is the relationship between local senior volunteerism and employment?*

Several policy issues affect senior volunteerism and work. Reimbursement for out-of-pocket expenses can be vital to maintaining senior volunteer participation; out-of-pocket expenses should not be eliminated completely. Reimbursement of senior volunteer expenses may incur less adverse affects than other budget categories when public and private sectors reduce funding for volunteer programs.

Involvement of senior volunteers in program management in the place of paid employees can help control program costs. Substitution of volunteers for paid staff may be prohibited by public law; contracts with employee unions and can give rise to outright employee opposition, demoralization and hostility. A strong ethic pervades the field of volunteerism which implies that volunteers, young or old, should not be involved to the detriment of regular staff.

A potential exists for exploitation of volunteers who are not paid for their labor (Cahn, 1988; Koeck, Shreve and Gagnier, 1981). Effective senior volunteer involvement can be impeded when paid professionals are unwilling to accept them as legitimate partners. When paid staff resent and fail to support senior volunteers, volunteer programs are likely to encounter problems with retention, morale, and performance (Brudney, 1990).

Future senior volunteer programs will need to consider employment related issues including barriers to volunteerism, volunteer career pathing, effective recruitment strategies, positive working conditions, and a system of incentives or fringe benefits (Costello, 1991). Volunteer recruitment can be enhanced by programs that prepare older volunteers for challenging positions and training them for meaningful work (Heil & Marks, 1991; Lynch, 1990; O'Donald, 1989).

### *4. What role does risk management play in local senior volunteerism?*

Risk management has become a seri-

ous concern of senior volunteer programs. In the past, the public attributed an underdog role to volunteer agencies based on their perceptions of the purposes, administrative style, female gender orientation, and financing of volunteer agencies. This role has changed; heightened resource capabilities have positioned senior volunteer programs for possible attack (Wilson, 1992).

Actions of senior volunteer programs are being challenged legally. Volunteers and agencies can be sued; for some complainants, suing is preferred to negotiating out of court (Schindler, 1992). For a volunteer organization, protection against a lawsuit can be expensive due to the high costs of insurance and litigation (Wilson, 1992).

Awareness and resolution of certain personnel issues in volunteer management can reduce liability problems. These issues include: obtaining a reference check on a volunteer; maintaining confidentiality of personnel files; complying with wage and hour laws; addressing stipend and reimbursement concerns; implementing a progressive disciplinary approach; and avoiding defamation of persons when dismissal from a volunteer position is warranted (McCormick and Warbasse, 1992).

### *5. How does an aging society affect senior volunteerism on the local level?*

The changing demographics of a growing elderly population will require increasing numbers and types of volunteers to address the needs of senior volunteer programs (Robert Wood Johnson, 1989). Older adults represent an untapped resource for community service and social action (Costello, 1991). The percentage of volunteers in the older population range from 9% to 37% (Fischer et al., 1991).

Volunteering at all ages has been influenced by several factors. Income and education are positively related to volunteering (Lemke and Moos, 1989). Married persons are more likely to volunteer than unmarried persons although this factor may be explained by the higher incomes

of married persons (Chambre, 1984; Hodgkinson & Weitzman, 1986). Women spend more hours volunteering than men but the greatest recent increase has been found among men (Hayghe, 1991; Romero, 1987; Morgan, 1986).

## METHODS

A national survey of local-level agencies on the topic of volunteerism and aging was conducted in 1992 by the Center on Aging at the University of Maryland at College Park. Respondents were associates of the Voluntary Action Centers (VAC). Voluntary Action Centers (VACs) act as referral services that encourage volunteerism throughout the United States. VACs are notified by organizations of their need for volunteers. The VACs refer this information to potential volunteers and assist them in linking up with appropriate volunteer positions. The 372 associate members of VACs operate independently although most receive basic funding or are part of United Way. VACs provide technical assistance such as training to nonprofit agencies and they help corporations develop volunteer programs. VACs are inter-related in the Points of Light Foundation through which they share ideas and resources.

All 372 associate members of VAC agreed to respond to a 116-item mailed questionnaire containing both open and closed ended questions on state policy on volunteerism and aging. Complete questionnaires were received from 160 respondents for a response rate of 43%.

## FINDINGS

Data addressing the five key questions are presented below. These data represent the viewpoints of the VAC directors which are based on their perspectives as local agencies faced with these challenges in an aging society.

### *1. What is the impact of the national economy on senior volunteerism at the local level?*

The state of the national economy has

been a pervasive concern in the United States in recent years. An unstable, unpredictable economy has had a far-reaching impact on multiple aspects of American society including senior volunteerism. According to VAC respondents, the national economy has had an impact on local senior volunteer programs over the last five years in four areas: funding, number of volunteers, number of clients served, and units of volunteer service. Funding has decreased for 38.75% of VACs. The number of senior volunteers increased 58.75%, a situation attributed by many respondents (35.67%) to increases in social needs. The number of clients served increased (71.25%) as did the number of units of volunteer service (up 50.62%).

### *2. What is the status of funding of senior volunteer programs?*

The state of the national economy is reflected in the state of funding of senior volunteer programs. Funding sources, the amount of funding, and resource allocation have changed for VACs over the last five years. The number of funding sources totaled 447 and the average number of funding sources for each VAC was 2.8. Top funding sources were foundations (55.62%), private sector (55.0%), private donations (50.62%) and government (50.62%) based on sum of state (26.87%) and federal (23.75%).

Change in the amount of funding was reported by a large percentage (80.62%) of VACs. Increases in the amount of funding are noted primarily for the private sector (28.75%), foundations (25.0%), and private donations (24.38%). Funding increased for 215 sources and the average number of funding sources per VAC was 1.34. Decreases in amount of funding were cited primarily for state government (15.62%), foundations (14.38%), and private sector (11.88%). Funding decreased for a total of 119 sources. The average number of decreases in funding sources per VAC was .74.

Resource allocation has also changed for VACs. Many VACs (77.5%) have noted changes in the amount of funds assigned to various budget categories. The primary increase has been in operational funds reported by 55.62% of responding VACs while relatively smaller percentage increases were noted for unrestricted funds (15.0%) and start-up funds (13.12%). Decreases in budget categories have been relatively minor with a decrease ranging 5–10% in each category. These changes suggest a direction that VAC budgets, and consequently VAC senior volunteer programs, may be taking in the future.

### *3. What is the relationship between local senior volunteerism and employment?*

Senior volunteers are, by definition, the core of senior volunteer programs. It can be difficult to manage a senior volunteer program when the definition of senior volunteerism is in a state of flux. Volunteerism was once characterized by one individual helping another individual through direct, personal contact. Senior volunteerism has developed into a highly organized and often a large scale activity. Recruitment and retention of senior volunteers and the relationship of senior volunteerism and employment are critical (Klug, 1990).

Social needs (35.62%) have contributed the most to an increase in the number of volunteers at VACs: The "opportunity to do something useful" (70%) is the primary feature that attracts VAC volunteers. Other factors in recruitment were cited by less than 4% of respondents. Recruitment of senior volunteers has become a difficult task due to competition with other programs for the same pool of volunteers (cited by 28.75%). Although competition for senior volunteers is a critical issue in maintaining and advancing senior volunteer programs, VAC respondents (76.88%) indicated that a program can have too many volunteers. Recruitment and retention can be affected by reimbursement of expenses but VAC responses give mixed

opinions, with responses about reimbursement distributed evenly along a continuum ranging from "very important" to "not important."

The relationship of senior volunteerism and employment is an unresolved issue. Volunteerism, unlike employment, is an activity that does not receive monetary compensation. This distinction has become less clear as voluntary organizations adapt employment practices to volunteerism. Only 8.75% of VACs noted state level opposition to the practice of providing stipends to certain senior volunteers for their activities. Over half the VACs (58.12%) stated opposition to senior volunteer programs which may be replacing paid workers with senior volunteers. Sources of opposition were unions (59.38%), program staff (51.5%), senior volunteers (32.5%), and private sector (30.62%). Nearly half (47.5%) of the VACs offered guidance to programs on how to reassign senior volunteers into other volunteer assignments. One third (35%) of the VACs offered guidance to programs on how to retire senior volunteers.

### *4. What role does risk management play in local senior volunteerism?*

In an era of increasing emphasis on legal matters, risk management issues are affecting administration of senior volunteer programs. Half (50.62%) the VAC respondents report having a policy on providing insurance coverage for programs. Liability insurance is the most popular (46.25%) and other types of insurance are cited by only a small percentage. The importance of providing personal insurance to senior volunteers receives a mixed response ranging from "very" or "somewhat important" (46.88%) to "unimportant" or "don't know" (31.87%).

### *5. How does an aging society affect senior volunteerism?*

Changes in the 65 and over population affect volunteerism at the local level within individual states and across the

United States. The majority of VACs (94.38%) report 13–18% of the population in their states are age 65 and over, compared to an overall rate of 12.6% in the 1990 population (AARP, 1991). VACs cited the economy as the most significant factor affecting volunteerism among older persons in their states. These VACs report that the economic situation has affected a 41.5% decrease in funding of senior volunteerism in their states, a 61.5% increase in number of senior volunteers, a 75.4% increase in the number of people served, and a 53% increase in units of service.

VACs (40.62%) reported 19–20% of older persons are categorized as poverty level in their states. This figure compares with a 12.2% poverty rate for persons 65 and older and a 19% rate for the poor or near poor in 1990 (AARP, 1991). VACs cited the economy as the most significant factor affecting volunteerism among older persons in their states. These VACs report that the economic situation has affected a 37.5% decrease in funding senior volunteerism in their states. The economy has affected a 58.1% increase in numbers of senior volunteers, a 71.3% increase in the number of people served, and a 50% increase in units of service.

Influences on senior volunteerism policy on the local level were reported by VACs. When asked to name all major influences, VACs cited senior volunteers (60.62%), funding sources (57.5%), state voluntary associations (56.25%), and state legislators (53.75%). When asked to name the primary influence, VACs cited voluntary associations (16.88%), state legislators (15.0%), and funding sources (11.25%).

## DISCUSSION

### *1. What is the impact of the national economy on senior volunteerism at the local level?*

Senior volunteer programs are doing more with less funding. On one hand, funding for local programs has decreased in terms of actual dollars (for 39% of VACs) or decreased in value due to inflation (for 44% of VACs). On the other

hand, utilization of senior volunteers has increased in terms of number of people served (71%) and number of units of senior volunteer service (51%). The number of senior volunteers to meet these needs is up 59%. These figures indicate more people are being served by more volunteers but with less units of service per client.

Although senior volunteer activity is currently strong in local programs, there is a question about how long volunteerism will be able to continue this pattern before reaching limits in performance and program expansion. Compounding this problem is the increasing number of elderly and their need for services provided by volunteers.

### *2. What is the status of funding of local senior volunteer programs?*

The state of funding reported by the VACs suggests factors for consideration by local senior volunteer programs in raising and managing funds. Unlike the past when senior volunteer programs typically were sponsored by a single dominant and reliable funding source, VAC funding comes from nearly three sources and averages five major types of sources per VAC. The sources are varied, coming from foundations, the private sector, and the public sector.

Management of multi-funded senior volunteer programs at the local level changes, particularly in the areas of grantsmanship, fund raising, and marketing. The process of applying for funding, once simple and informal, tends now to be more complicated and formal. Business which might have been conducted through a handshake or letter of understanding between local participants is being replaced with detailed written applications, critical review of proposals, and competition for limited funds. Competition has increased and success in obtaining funds, even through multiple applications, is uncertain. The quest for funding has expanded from local supporters to include state and national sources.

More staff time of local senior volunteer programs is being allocated to fund raising. A staff that is already overloaded with tasks is faced with difficult options:

- 1) Pursue funding, increase administrative work time, reduce direct service contact, and increase the risk of meeting fewer client needs involving direct contact;
- 2) Do not increase administrative work time and run the risk of not securing adequate funding and the program declining while maintaining direct service contact;
- 3) Enter other organizational relationships such as a merger which combine organizational resources and possibly increase client services;
- 4) Cut back or terminate all or selected operations.

Another approach to funding is to focus on developing staff capabilities and expanding their tasks. Staff in senior volunteer programs are often motivated by an altruistic orientation and they measure performance in terms of the people they served. Staff, however, are becoming increasingly called upon to perform organizational tasks, such as fund raising, grantsmanship and marketing. Redefinition of job descriptions and retraining are needed to enable staff to have the capabilities needed to compete for funds.

### *3. What is the relationship between local senior volunteerism and employment?*

The distinction between senior volunteerism and employment is narrowing. Among the interfaces that may occur are:

- 1) A senior volunteer acquires training, supervised experience, and an opportunity to become proficient at skills transferable to the local market place;
- 2) Local employers provide financial support to senior volunteer programs to conduct training and supervise experience as prerequisite to volunteers accepting paid jobs in the work place;
- 3) Senior volunteer programs need additional expertise that their limited, over committed budgets and already demanding work loads are unable to

cover. Employers provide consultation to senior volunteers in needed areas such as financial management. Consultation may be offered as a civic responsibility, for tax incentives, to improve corporate image and to forge political/economical/social ties;

- 4) Stipends may provide limited monetary compensation to senior volunteers who meet eligibility requirements and offer certain services to local clients. Stipends provide earned income for the financially disadvantaged and pump dollars into the local economy.

### *4. What role does risk management play in local senior volunteerism?*

This study suggests the importance of insurance to senior volunteer programs and identifies liability insurance as the main type of insurance purchased. The increased financial stature of senior volunteer programs, a social system in which litigation has become common, and the large scale operations of volunteer organizations have contributed to a demand for policies which protect the interests of senior volunteers and senior volunteer programs.

The high costs of insurance can prove prohibitive to senior volunteer programs, particularly in a time of budgetary restrictions. Using funds to purchase insurance can mean that expenditures for other items, including direct client services, may have to be reduced. The mission of a senior volunteer program may have to be rethought and activities eliminated to free up funds to purchase adequate insurance coverage. When the risk management issues become insurmountable, the senior volunteer program may have to be dissolved. The outcome on the local level is clients who need services cannot obtain them.

Resolution of this problem is tied to the implementation of policy that redefines the parameters of litigation and insurance claims. Senior volunteer pro-

grams can work in their local communities with their professional association and other allies such as government, corporate sponsors and client associations to enact risk management policies acceptable to volunteerism.

5. *How does an aging society affect senior volunteerism on the local level?*

Changes in the population 65 years and over influence the configurations of volunteerism on local, state, and national levels. Ideally, response to increases and decreases in the numbers and needs of the older population for volunteer services should be rapid. Realistically, response rate may be slower. Time is needed to accomplish shifts in funding, staff, facilities, and volunteers between programs. Political considerations affect how funds are allocated, independent of need. Although planning could help alleviate the time gap between identification of a need and implementation of a solution, planning by senior volunteer programs is limited by several factors: lack of financial support for staff to devote time to planning function, day-to-day pressures that make service activities the top priority, and uncertain prospects of being able to implement long range plans.

## CONCLUSION

VAC associate members report issues that their programs are confronting regarding senior volunteerism. Policies will need to be developed regarding these issues so that VACs can manage senior volunteerism effectively in a constantly changing environment. In order to accomplish this, the needs of local level agencies must be reviewed in the context of the state and national environments impacting them. Policy developed at these levels must take into consideration local-level problems and issues and all three levels must work together for effective outcomes.

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