

TIME AND MONEY

The Role of Volunteering in Philanthropy

RESEARCH INSIGHTS

A 2014 survey explored the current volunteering activity of Fidelity Charitable® donors across charitable sectors. The survey investigated the relationship between volunteerism and charitable financial support, the influence of age and life stage on volunteer activity, factors donors use to evaluate volunteer commitments, and intent to increase or decrease volunteer activity in the future.

Key findings

- Most (79%) Fidelity Charitable® donors volunteered in the last 12 months. Among those volunteers, more than two-thirds (67%) committed 50 or more hours to volunteering, with nearly half (49%) volunteering for three or more organizations.
- 84% of volunteers expect to maintain or increase volunteering commitments in coming years.
- 87% of volunteers say there is an overlap between their volunteer and financial support.
- Half (50%) of volunteers say they give more financial support because they volunteer.
- Age and life stage influence the amount of time donors give to causes. While younger donors are more likely to volunteer, they spend fewer hours overall; donors near retirement age volunteer more hours for more organizations.



Among Fidelity Charitable donors in 2014:

79% VOLUNTEERED

**67% of volunteers
GAVE 50 OR MORE HOURS**

**84% EXPECT TO MAINTAIN
OR INCREASE VOLUNTEERING
commitments in coming years**

**50% GIVE MORE FINANCIAL SUPPORT
because they volunteer**

What is the prevalence and outlook for volunteerism?

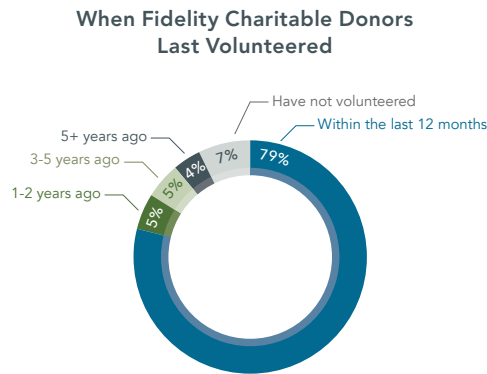
Most Fidelity Charitable donors volunteered last year

In the last 12 months, **nearly 4 in 5 (79%) donors volunteered¹ for a charitable organization**, indicating their interest in providing more than financial support for their charitable causes.

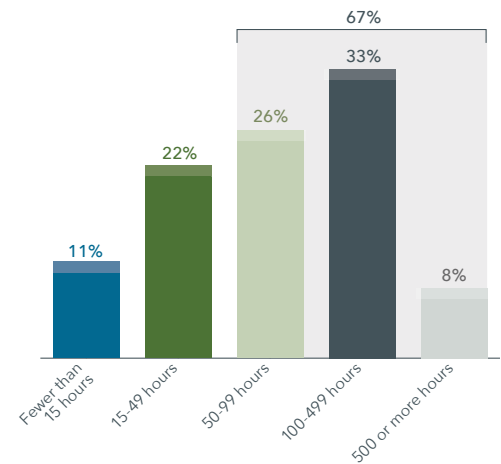
Two-thirds (67%) of those volunteers committed 50 or more hours to volunteering, with 41% committing more than 100 hours.

Nearly half (49%) volunteered for three or more organizations.

Though fewer than 1 in 10 donors (7%) have not yet volunteered, this group was most likely to cite lack of time and preference for financial support as reasons for not volunteering.

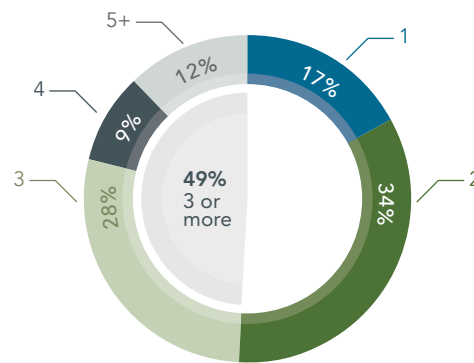


Hours Volunteered During Past Year*



* Among donors who volunteered in the last 12 months.

Number of Organizations*



* Among donors who volunteered in the last 12 months.

Among all Americans in 2013²:

25% VOLUNTEERED

51% of volunteers GAVE 50 OR MORE HOURS

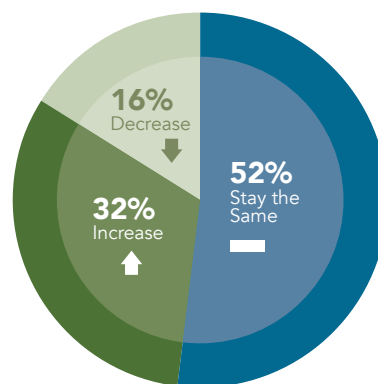
Most volunteers in America were involved with ONE (71%) OR TWO (19%) ORGANIZATIONS

Donors plan to continue or increase volunteering in the future

84% of volunteers expect to maintain or increase their commitments over the next few years, including about half (52%) who plan to keep their current commitments at the same level.

Less frequent volunteers, who give fewer than 50 hours, are more likely to say they will increase their commitments in the next few years (40% compared to 32% overall), while the most involved volunteers are planning to maintain their current commitments. 60% of those who have volunteered more than 100 hours say they will volunteer the same number of hours in the next few years.

Prediction of Future Volunteer Time



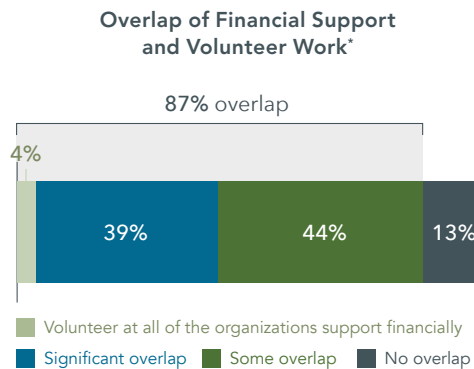
¹ In this executive summary, unless otherwise noted, volunteer refers to a Fidelity Charitable donor who has volunteered (93% of sample). In the survey questionnaire, a volunteer was described as "an officer, trustee, or other person who performs services for a charitable organization but does not receive compensation, either directly or indirectly, for those services with the exception of expenses." A volunteer can perform "a broad range of activities, such as serving as a board member, coaching or refereeing a sports activity, leading scouts, providing support to a religious organization, fundraising for an organization, tutoring, or teaching."

² Bureau of Labor Statistics. "Volunteering in the United States." (2014)

What is the relationship between volunteerism and financial support for charity?

Two-pronged support for charities

Most volunteers support their causes with both time and money—not one or the other. 87% of volunteers say there is overlap between the organizations they support financially and where they volunteer, with 43% describing significant or total overlap with the organizations they support financially and as a volunteer.



* among volunteers

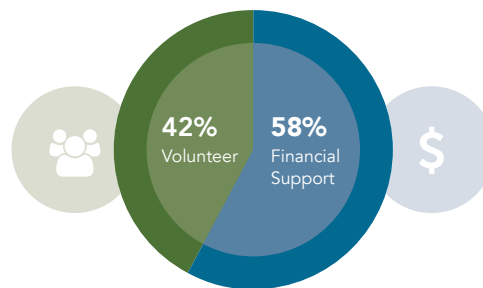
Financial support usually comes first

Volunteers are more likely (58%) to support a charity financially before volunteering. However, 2 in 5 (42%) volunteered at a charity before making a donation to that organization, indicating that for a significant number of donors, volunteering can be an important way of evaluating an organization for future support.

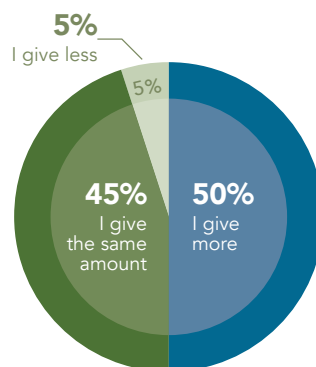
Volunteering can also influence charitable contributions. While 45% of volunteers say they give the same amount of financial support as they would if they did not volunteer, **half (50%) say volunteering leads them to give more financial support.**

These results suggest that organizations that provide robust volunteer opportunities have an edge in creating a steady donor base and in growing their overall level of financial support.

Financial or Volunteer Support—Which Came First?



Influence of Volunteering on Financial Support



Volunteering varies across sectors

Few volunteer for sectors that they are not also supporting financially.

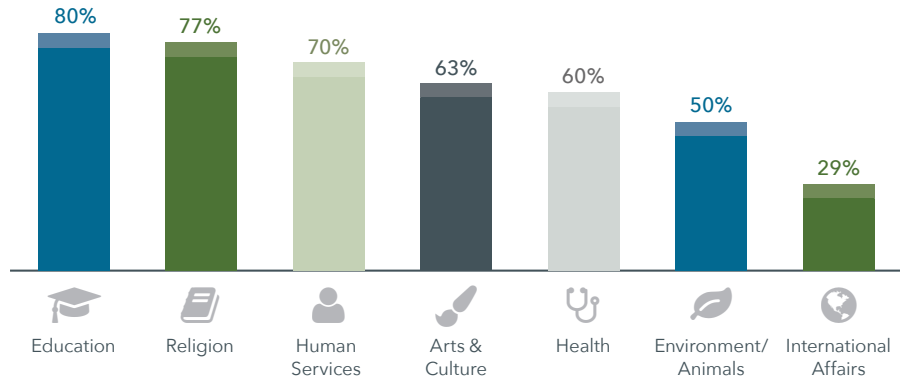
However, they do not devote their time equally—volunteers are more heavily concentrated in some sectors over others.

Volunteers are most likely to donate time and financial resources to organizations that support religion (70% volunteer and donate), education (52%), and human services (48%), while organizations that support environment and animals (26%) and international affairs (15%) are more likely to receive financial support alone from supporters.

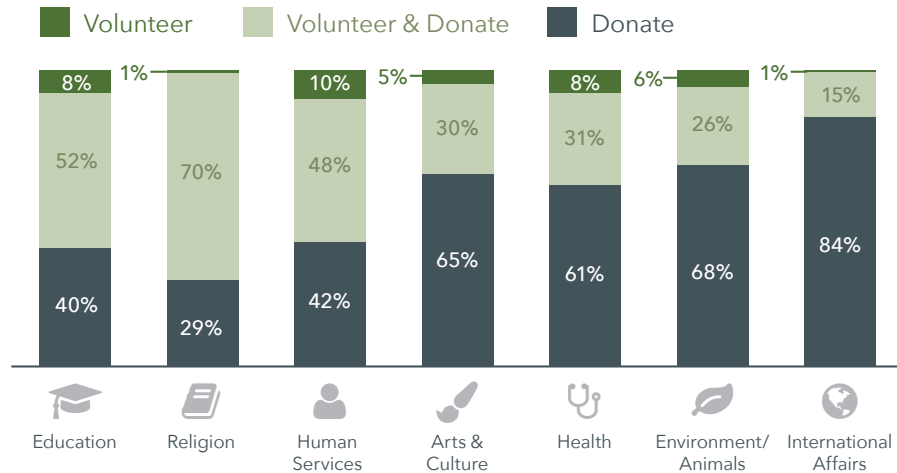
Sectors with high rates of volunteerism have several commonalities, including regular touchpoints with potential volunteers and mature structures for volunteer engagement. Conversely, practical considerations likely reduce volunteer rates in other sectors; volunteers may need specialized skills or may not have easy access to volunteer opportunities.

Type of Support by Sector

PERCENTAGE WHO HAVE VOLUNTEERED AND/OR DONATED RESOURCES TO THIS SECTOR, IN THE LAST 12 MONTHS



PROPORTIONS OF THOSE WHO VOLUNTEER, DONATE AND VOLUNTEER & DONATE



How do donors choose volunteer opportunities and what roles do they play?

Mission is a critical factor in volunteerism

Volunteers report that an **organization's mission and ability to serve the community are the most critical factors** when determining whether or not to give time to an organization. 85% say mission is a critical factor, while 60% say ability to serve their local community is important.

However, while mission comes first, donors are also seeking meaningful volunteer opportunities. The ability to use a specific skill set (59%) and the type of volunteer work (52%) factor heavily into the decision about where to volunteer. Volunteers see these as far more important factors compared to flexibility in location (28%), relative convenience of location (24%), and the number of volunteer hours required (20%).

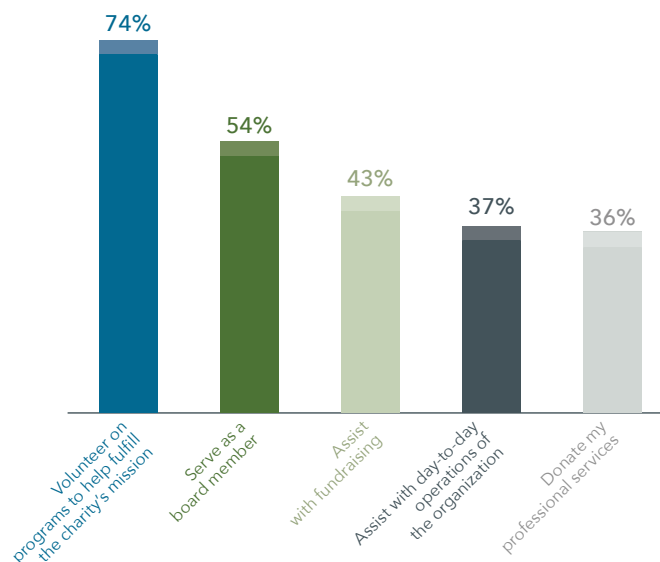
Factors Critical in Deciding Where to Volunteer



A majority of volunteers support programs, many take on skilled roles

Nearly three-quarters (74%) of volunteers perform work that helps an organization fulfill its charitable mission. Additionally, many volunteers describe roles that suggest a **deeper involvement in charitable causes**—nearly 54% serve on a nonprofit board, 43% assist with fundraising, and 36% donate professional services.

Description of Volunteer Work



How does stage of life influence volunteerism?

Younger donors

While most (89%) donors 50 and under have volunteered in the last 12 months, this group volunteers fewer hours overall (25% spend 100 or more hours, compared to 54% of those near retirement, ages 61-70). However, 50 and under volunteers are optimistic about future time committed to volunteering: **43% plan to increase their volunteering in the next few years.**

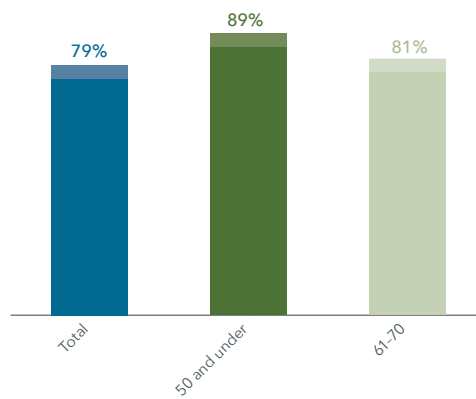
When deciding where to volunteer, **younger volunteers also demonstrate different priorities from the broader volunteer population**, indicating that they may balance a range of family and career obligations with their philanthropy. Volunteers under 50 are more likely to consider critical the required volunteer hours (28%, compared to 18% of those near retirement age) and the ability to volunteer with family (34%, compared with 8% of those near retirement age).

Donors near retirement age

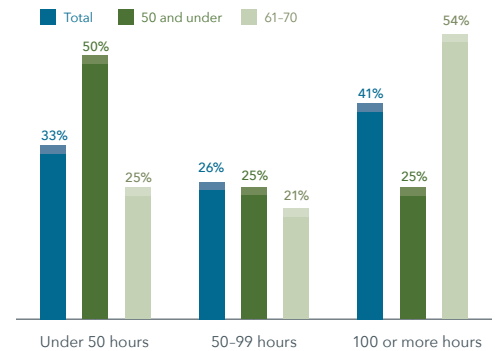
On average, donors near retirement age, 61 to 70 years old, spend the most time volunteering (54% spend 100 or more hours, compared to 25% of donors 50 and under). Moreover, 4 in 5 (82%) plan to maintain or increase their volunteer hours in coming years. Volunteers 61-70 are also more likely to show interest in opportunities that require a specific skill set (65%).

Compared to younger volunteers, volunteers near retirement age are increasing their focus on philanthropy, dedicating more time to charitable causes as they wind down their careers, but also looking to engage in volunteer roles that put their skills to work.

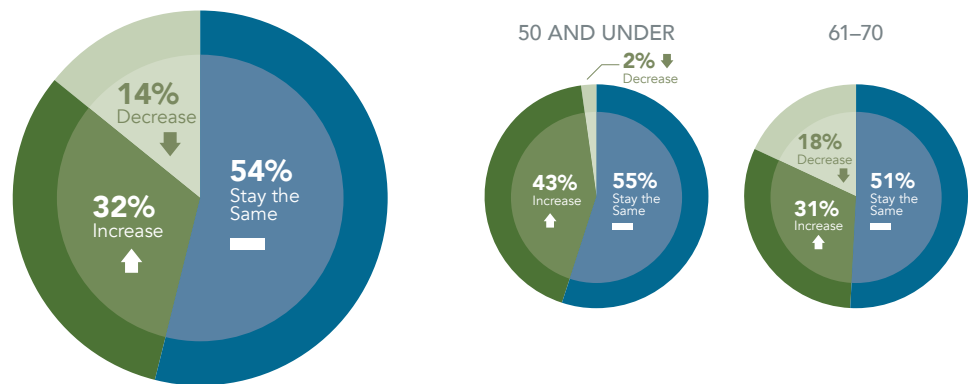
Volunteered in the Last 12 Months, By Age



Hours Volunteered in Last 12 Months, By Age

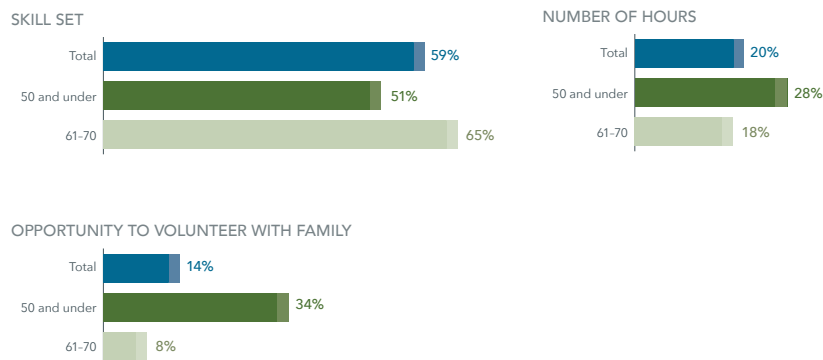


Prediction of Future Volunteer Time, By Age*



* Among those who have volunteered in the last 12 months

Factors Critical in Deciding Where to Volunteer, By Age



METHODOLOGY AND BACKGROUND

This report is based on a survey conducted by Ipsos, an independent research firm, in August-September 2014 on behalf of Fidelity Charitable. 354 donors provided information. The percentages reported exclude donor responses of NA/Unsure.

Throughout the report, reference to “donors” refers to the primary donor or the primary corporate contact connected to the “Giving Account®.” All Giving Accounts have one person designated as the primary Account Holder (or in the case of Corporate accounts, the primary Corporate contact), although each Giving Account® may have more than one Account Holder (i.e., person with advisory privileges, including the ability to recommend grants) associated with it.

ABOUT FIDELITY CHARITABLE

Fidelity Charitable is an independent public charity that has helped donors support more than 190,000 nonprofit organizations with nearly \$19 billion in grants. Established in 1991, Fidelity Charitable launched the first national donor-advised fund program. The mission of the organization is to further the American tradition of philanthropy by providing programs that make charitable giving simple and effective.

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