

# Why and How to Use Volunteers in Fundraising



**After reading this chapter, you will be able to:**

- List the reasons why people volunteer to do fundraising.
- List the qualities to look for in volunteer fundraisers.
- List various fundraising activities in which you can use volunteers.

“The American tradition of philanthropy is built on the foundation of volunteerism and that tradition must not be lost,” says James Greenfield in his book *Fundraising*, second edition. In the United States, where voluntary action has been such a strong part of the philanthropic process, volunteer fundraisers have been recognized as an integral part of the profession of fundraising. Volunteers in the United States have been involved in fundraising as early as colonial days, when Benjamin Franklin set about the task of raising money for charitable organizations. In other parts of the world, where fundraising is an emerging profession, the role of volunteers is even more critical.

Many development officers struggle with these questions: Is it easier to just do it oneself? Who should make the ask—paid staff or volunteers? Can volunteers be as effective as staff in making the ask? Who can be recruited to serve as volunteer fundraisers? How do these volunteers receive the training and information they need to be effective fundraisers? If staff members are the professionals, why does an organization need volunteers for its fundraising efforts? The answers to these questions will vary from organization to organization, but almost every nonprofit organization benefits from involving volunteers in more of their fundraising activities. The key is learning how to recruit the right volunteers for the right job and providing those volunteers with the tools they need in order to be effective fundraisers.

In her book *Pinpointing Affluence*, Judith Nichols says that volunteers are the best advocates for an organization. “They provide the community’s endorsement for your nonprofit, encouraging people of affluence and influence to follow their lead.” As Nichols explains, it is important for a nonprofit to prove its credibility by showing the ability to recruit volunteer fundraisers. Equally as important as the advantages to the organization of involving volunteers are the benefits to the volunteer fundraisers. Nichols quotes Maurice Gurin in stating that, “In soliciting large gifts, volunteers derive the kind of satisfaction that increases their own interests and commitment. Depriving them of that satisfaction could well have serious consequences for fundraising and for philanthropy in general.”

## **Why Do People Volunteer?**

In *The Seven Faces of Philanthropy*, Russ Alan Prince and Karen Maru File talk about seven types of people and what motivates each to give: Altruist, Communitarian, Devout, Investor, Socialite, Repayer, and Dynast. Altruists give (or volunteer) purely for the sake of being able to help. Communitarians contribute their time, talent, and treasure to a cause they feel will make their community a better place in which to live and because they truly care about their community.

Religious beliefs often play a significant role in people's propensity to give a gift or to volunteer their time, as in the case of the Devouts. Investors are more likely to make a gift of time or money if they feel there is some payback for themselves or others. Socialites are often the donors, or volunteers, who are seen at events where they can mix and mingle with other like-minded people. Repayers give of their time and/or money because they feel the need to give something back to society, or more specifically to an organization that has helped them, a friend, or a family member. Dynasts give and/or volunteer mainly because it is part of their family tradition. No matter what the motivation, there is always one factor that stands out in the minds of the major donor. In his book *Mega-gifts*, Jerold Panas uncovers this factor, citing his research that proves donors give for many different reasons, but above all is the belief in the organization's mission.

Like donors, volunteers become involved for many reasons, including family history, religious influence, altruism, wanting to give back, community spirit, investing in their own or someone else's future, or because it is fun. But, if they do not believe in the mission of the organization, they will not be effective volunteers who can successfully ask a potential donor to contribute to the organization.



### TIPS & TECHNIQUES

***Here are some cardinal rules of involving volunteers in fundraising that will be stressed throughout this book:***

- Volunteers can only be effective if they truly believe in the mission of the organization.
- Volunteers should be invited to give of their time, talent, and treasure.
- Volunteers must be given meaningful work, not just busy work.
- Volunteers require staff support in order to be effective.

The mission is the driving force behind the organization's programs and activities—its reason for existence—and the mission needs to be clearly understood and accepted by the volunteers in order for them to be effective at fundraising for any organization.

Who is the ideal volunteer? “It is someone who is committed to your mission,” says Betsy B. Clardy, CFRE, in *Advancing Philanthropy* (July/August 2004). “It is someone who has connections to people you cannot reach otherwise; someone who really wants to give of their time, talent and treasure to help you.”

What motivates volunteers to get involved in an organization's fundraising efforts? For many Board members, fundraising is seen as an obligation to ensure the fiscal stability of the organization. For other volunteers, they may do so because (1) they have a connection to the organization—a relative who is a member of the staff or board; (2) they or a friend or relative have been recipients of the organization's services; or (3) they have been approached by another volunteer and invited to get involved. No matter what the motivation for getting involved, if they do not care about the cause, they will not be effective volunteers.

In a survey done by the author (*New Directions for Philanthropic Fundraising*), volunteers report that they are willing to do fundraising for those nonprofits that have a mission or cause in which they believe but also that give them the support volunteers need, including staff communication and information. Recognition gifts do not seem to excite volunteers, but a simple thank you, a published acknowledgment, or perhaps a fun recognition event is what they are looking for, according to the volunteers surveyed. Jim Ingolio's research on donor recognition can easily be transferred to recognition for volunteers. Ingolio found that “55 percent of all donors stop giving within the first year to a particular charity, and nearly 85 percent of all donors no longer give to the same charities by the fifth year after their first time gift.”

The serious problem of donor attrition is often tied to acknowledgment and recognition of donors. Likewise, volunteer attrition often results when the nonprofit overlooks providing volunteers with the proper tools to enable them

to succeed and fails to acknowledge their efforts. What types of recognition do donors and volunteers desire? Ingolio surveyed nonprofits and donors in Pennsylvania and found that although half the nonprofits surveyed said that donors display their tokens of appreciation, only one-third of the donors replied that they actually display those items. However, “80 percent of the donors felt that some form of recognition is important for good donor stewardship” and “only 20 percent of donors believed their charitable giving is motivated by recognition.”

Likewise, volunteers agree that while they want to be recognized for their efforts, there does not have to be an elaborate gift or event for the organization to show appreciation for its volunteers. What is needed are (1) expectations that are clearly communicated, (2) the tools that will enable the volunteers to succeed, and (3) acknowledgment that the volunteer role is important to the organization. The importance of recognizing volunteers for their fundraising efforts, not only with token gifts, but by recognizing their contribution in a more personal way, is paramount to maintaining relationships with fundraising volunteers.



#### IN THE REAL WORLD

## Recognizing Volunteers

In a focus group, volunteers were asked how they felt about the organizations for which they volunteer, soliciting them for monetary contributions in addition to their volunteer time. There were varied responses to this question, but one points to the role of the importance of this intangible recognition of the volunteer efforts. One volunteer said he didn't mind being asked for a gift, but one organization he had volunteered for really made him angry when it sent him a direct mail piece, addressed to “Dear Friend,” not recognizing his special relationship with the organization. He not only did not give to that appeal, but he also stopped volunteering for the organization.

According to the U.S. Bureau of Labor Statistics, more than 28 percent of all Americans volunteered in 2003. But how does the nonprofit get its “fair share” of these volunteers, and how does it find the volunteers who are willing to ask for money? Understanding what motivates volunteers can help in the recruitment process. Fundraising volunteers are a unique type of volunteer. Unfortunately, many people, even Board members, often say, “I’ll do anything for this organization, but don’t ask me to raise money. I can’t ask anyone for money.” So, how does an organization find those unique volunteers who actually enjoy asking for money? Or are these people a figment of the Development Director’s imagination?

## **Is a Good Fundraiser Born or Is Fundraising an Acquired Skill?**

Professional fundraisers often joke about the fact that no one sets out as a child to be a fundraiser when he or she grows up. Very few people appear to be “born to raise,” although good fundraisers do seem to share some common traits. Panas lists qualities to look for in a professional fundraiser. The top five are (1) impeccable integrity, (2) good listener, (3) ability to motivate, (4) hard worker, and (5) concern for people.

These same qualities should be sought in volunteer fundraisers as well. Volunteer fundraisers certainly need to have integrity in order to gain the trust of potential donors. Volunteers will, at times, handle sensitive information about prospective donors such as prior giving history, relationship with the organization, and so on, and these volunteers must have a clear understanding of the ethical issues involved with their volunteer positions. People of integrity will be well respected in the community and can bring this respect and credibility to the organizations for which they volunteer.

Volunteer fundraisers must surely be good listeners. Eighty percent of communication with potential donors should be in listening, not in speaking.

Although volunteer fundraisers must be able to articulate the case, it is in listening that the volunteers will gain insight into the donors' needs and desires. Volunteers are often reluctant to accept the fundraising role because they think they are not the slick talker, salesperson type. These volunteers may not recognize that quiet, deep-thinking people are often more successful fundraisers because they listen to what the prospective donors are really saying and can often find the right hot button to prompt a major gift, simply because of this wonderful ability to listen. In fact, it is sometimes said that God gave us two ears and one mouth for a reason!

Volunteers, especially those who serve in leadership roles, must be able to inspire and motivate others to action. Because this quality is intangible, it sometimes takes trial and error to determine which volunteers truly have the ability to lead and inspire others. Usually they are people who are in leadership positions in their professions or leaders in their churches, synagogues, service clubs, and/or political arenas, but not always; it may be the person has never emerged as a community leader because he or she hasn't found a cause to feel passionate enough about to make it a major focus. The true leader possesses a special charisma. It is what Andy Stanley refers to in *Visioneering* when he says, "anybody who has ever received and followed through successfully with a God-given vision has possessed a form of authority that rests not on position or accomplishment, but on an inner conviction and the willingness to bring his or her life into alignment with that conviction." The nonprofit professional working with volunteers must always be on the lookout for those true visionary leaders who will surface from time to time, and cultivate these people to accept leadership roles within the organization where they will have the opportunity to inspire and motivate other volunteers to positive action.

There is no question that volunteering is hard work. Volunteer fundraisers must often be willing to learn new skills, to step out of their comfort zone, and to accept new responsibilities—and all of this is hard work. The time commitment alone is a lot of work for busy people. Many volunteers give so much of

their time to a nonprofit that it is truly an avocation, and the best volunteers have enough free time to devote to the agreed-upon volunteer tasks. For this reason, entrepreneurs often make good volunteers because, while their time may be limited, a boss does not direct their schedule. However, if these people are passionate about the organization and its mission, they will find the time to be effective volunteers. Experience shows that those who really care about a cause will find the time to devote to it.

Finally, volunteer fundraisers must care about people. No matter the purpose of the fundraising—capital, endowment, or operating expenses—the truism of “people giving to people” should always be remembered. Volunteers who care about the people being served by the organization for which they volunteer will passionately communicate the case for support. Volunteer fundraisers must be sensitive to the needs of staff, other volunteers, the clients of the organization, and above all, the donors.

Fundraising can be taught and/or learned from experience. Today, courses for professional fundraisers are available online and on college campuses throughout North America. Although most of the participants in fundraising conferences, workshops, and formal education classes are professionals pursuing fundraising as a career, some volunteers will gladly avail themselves of this training in order to better help the organizations they care about. Particularly in grassroots organizations and in countries where fundraising is a fairly new profession, volunteers play a vital role in fundraising and are often the only fundraising support the organization has in its development efforts. These volunteers are often found at meetings, workshops, and conferences where they can learn more about fundraising in order to become more effective in their role as volunteer fundraisers.

## **Fundraising Roles for Volunteers**

Most organizations rely heavily on volunteers when conducting a capital campaign, but often ignore the possibility of increasing their reach and effectiveness in





**IN THE REAL WORLD**

## Volunteer Dedication

***One consultant cites several instances of volunteers who, on their own time and money, have pursued ongoing education in the fundraising profession:***

- One volunteer, who donated an enormous amount of her time for her children's preschool, attended a 10-month training program, at her own expense, in order to better help her organization with its fundraising efforts.
- When the Association of Fundraising Professionals' international conference was held in Philadelphia a few years ago, a married couple flew there from Phoenix, again at their own expense, because the wife was on the board of several nonprofits and wanted to enhance her ability to help these organizations with their fundraising.
- A volunteer fundraiser not only paid her own membership in the Association of Fundraising Professionals and attended all of the meetings and conferences held by her chapter at her own expense, but also served on the Board of the chapter.

fundraising by using volunteers throughout all of their fundraising efforts. Numerous fundraising activities can effectively use volunteers, including the following:

- Special events.
- Annual fund.
  - Direct mail.
  - Telephone fundraising.
  - Corporate appeals.

- Grant proposals.
- Major gifts appeals.
- Capital and endowment campaigns.
- Planned giving efforts.

Some of these activities are traditionally known to be volunteer dependent, but all of them can effectively use volunteers. Greenfield says, “Every activity has an absolute need for volunteer leadership. Without someone to recruit others, conduct the meetings, provide direction (and respect), keep the program on track, and insist on performance and success, the entire effort is lost.” Although staff can certainly fill many, if not all, of these roles, volunteer leadership brings a new dimension to these fundraising activities by providing that essential ingredient—an outside perspective that looks at the organization and the task at hand as a special avocation. The following chapters discuss in detail these various roles volunteers can play in a nonprofit organization’s fundraising efforts.

## **Why Volunteers Are Effective at Making the Ask**

“Leadership Volunteers have the ability to influence retention and the upward movement of donors more than anyone else” (Burk). Volunteers are in a unique position to ask others for money for several reasons: (1) They aren’t getting paid to do it; (2) They have a real commitment to the mission of the organization; (3) They have already made a significant contribution themselves; (4) They care enough that they are taking time from their “real work” to participate in the nonprofit organization’s fundraising program; and (5) They are often doing a task that they don’t really savor, but for which they recognize a need. Few people actually enjoy asking others for money. Although many volunteers out there are really good at it, most of them will say they really don’t enjoy it. So, if they are willing to do something they don’t really enjoy without any pay, some other reward must keep them coming back and make them successful at what they do.

Kay Sprinkel Grace says, “Volunteer involvement is a basic component of the nonprofit sector’s capacity to respond to community needs.” Without volunteer fundraisers, many organizations would need to hire huge development staffs, driving up the cost of fundraising and forcing the organizations to cut back on the very reason for their existence—program! Grace goes on to say, “Because volunteers represent the community, they provide insight and perspective that nonprofits must have to shape their programs and outreach appropriately.”

One of the reasons why volunteers are so good at asking for money is simply that they are *volunteers*. This does not mean to say that staff people are not committed to their organizations. Many readers will be able to cite numerous instances of staff people (perhaps themselves) who have been with their organization for many years and are obviously committed to the organization. Let’s face it, most people do not work for a nonprofit because of the huge salary they are pulling down, but rather because they believe in what the organization is doing. The recent trend toward more stability in the profession points out the fact that development officers are staying in their jobs longer because of this commitment, but there is still that special commitment that comes only with volunteering. In fact, most development staff people still volunteer for some other nonprofits in their free time—at their church, their children’s school, the local Chamber of Commerce, the AFP or another professional organization, or some other agency whose mission is especially close to their hearts. As volunteers themselves, most development people will understand that special feeling that comes from volunteering that is different from the satisfaction received on the job.

Another reason why volunteers can be more effective than staff is that they are generally soliciting their peers and approaching people to give at a level at which they themselves have already given. For this reason, it is recommended that staff and volunteers call on major donors as a team. (More about this topic in a later chapter.) Volunteers can easily tell peers that they have already made an investment in this organization themselves because they believe so strongly in the good work the organization is doing. They can then invite prospective donors to join them in this investment. Greenfield says that when a solicitation comes

from a friend, “the information and intent are trusted,” and the enthusiasm of the volunteer can be the convincing factor to persuade the donors to give.

The volunteer role in fundraising is critical because of the sincerity and commitment volunteers bring to the table, the connections that often would not be available to the nonprofit fundraiser, and the special expertise and leadership qualities that lend credibility to the organization.

## Summary

Volunteers are the foundation of a strong development program. Although this is accepted as part of the definition of philanthropy, most organizations underuse volunteers or use them in the wrong ways. Among the ways volunteers can play a meaningful role in the organization’s development program are the following:

- Special events.
- Annual fund.
  - Direct mail.
  - Telephone fundraising.
  - Business appeals.
- Grant proposals.
- Major gift efforts.
- Capital campaigns.
- Planned giving.

Although the fundraising program must be a joint effort between staff and volunteers, volunteers are generally more effective at fundraising than staff for several reasons:

- They are volunteers, not in paid staff positions.
- They believe strongly in the mission of the organization.

- They have already made a financial commitment at the level at which they are asking the prospects to give.
- They are asking peers to join them in investing in the organization.

## Further Reading

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