



The Role of Volunteers in Development

Why bother with Volunteers?

Contrary to some notions today, volunteerism is more important than ever. In a time when more and more fundraising efforts are partially or completely dependent on professional staff, the notion of volunteerism in development may seem impractical or even anachronistic. Admittedly, managing a corps of volunteers can be just as much work, and perhaps even more so than assigning the same tasks to employees. So why bother? We can offer several reasons.

- 1. The impact on the volunteers themselves.** Long-term financial commitment is built upon a tradition of voluntary involvement. When volunteers internalize an organization’s mission and case for support, and begin to articulate it in their own words and experiences, they have invested themselves in the future of the organization — they have invested themselves as owners.
- 2. Donor prospects give more generously to volunteers.** It is widely accepted that in most cases a prospective donor is more likely to respond generously to a committed and capable volunteer than to a paid staff member, no matter how impassioned or articulate the request.

(continued, page 3)

Organizational Success

What do our volunteers want from us?

The most recent data reported by the U.S. Bureau of Labor Statistics indicates that 62.6 million people volunteered through or for an organization at least once in the 12 months that ended September 2013. However, this volunteer rate was the lowest it has been in the past decade, declining 1.1 percentage points to 25.4 percent of the population.

Every organization should strive to create ways for volunteers to be authentically involved in the fulfillment of its mission, especially in the fundraising arena. Now for the first time in 10 years, it appears that good volunteers are harder to get than they used to be — but why is that? Perhaps it has less to do with what we want from them, and more to do with what they want from us.

Volunteers often get involved because someone they know and respect asks them to — but they stay involved if they find the experience rewarding.

Initially, volunteers often get involved with organizations primarily because a person they know and respect asks them to get involved.* They stay for years, however, *only if the experience is rewarding for them*. It has been our experience that organizations who demonstrate the following characteristics will attract and retain a more robust corps of fundraising volunteers.

1. Those organizations who are known and respected for success in serving the community and fulfilling their mission.
2. Well-managed and financially sound organizations (i.e., headed by an effective CEO).

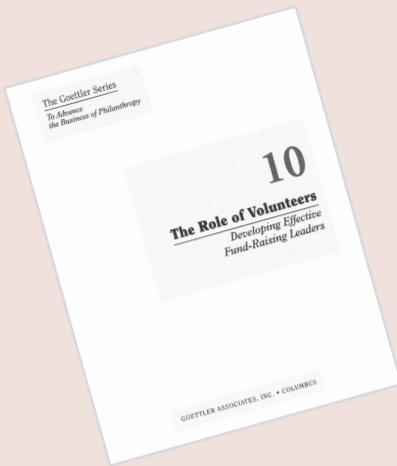
*Some organizations (e.g., food banks) must recruit and train a large number of volunteers just to deliver their services. Here we are speaking primarily of volunteers who are recruited to help the organization raise money.

(continued, page 2)

*To Advance the Business of
Philanthropy*

The Role of Volunteers Developing Effective Fundraising Leaders

As the number of development professionals continues to grow, why do volunteers remain indispensable? How can volunteers and professionals work together most effectively? All this and more is discussed in Volume 10 of the Goettler Series.



GoettlerAssociates is pleased to make our web resources available for fundraising professionals and engaged nonprofit volunteers.

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What do our volunteers want from us?

(continued from page 1)

3. Institutions that are moving forward with an inspiring vision and a workable plan.
4. Trustees who have a meaningful role in advancing the organization.
5. Organizations with effective fundraising programs (i.e., competent development staff).
6. Volunteers who are given worthwhile tasks to perform.

If your organization has been around for more than a few years, then it is probably a well-managed and successful organization that is known and respected. When it comes to attracting volunteers, elements three to six will give you a definite edge — and that's where the experience and expertise of counsel can be especially helpful!

If your organization is not attracting the volunteer corps you desire, these steps may be especially beneficial.

- A well-conceived **strategic planning process** (best facilitated by an objective outsider) can help to refine or redefine your vision, and develop a plan to move the organization in the right direction. When those who will be responsible for carrying out the plan are also involved in its development, the chances of success will be greatly increased.
- A **board development process** — once again, when facilitated by an outsider who is politically disengaged — can help you to redefine the role of trustees, including their relationships with staff. Some organizations set a minimum annual giving level, or even require board members to sign a written agreement.
- A thorough **development assessment** and a development plan based on actual results can help you systematically strengthen your development staff and programs. For example, you may need to better define the role of philanthropy (and those of donors and volunteers) in the advancement of the organization.

Finally, by working with counsel on an ongoing basis — not just during planning/feasibility studies and capital campaigns — you can create a continuum of improvement. That will help to build and maintain a culture of philanthropy, and an involved and responsive constituency for current (and future!) campaigns.



Why bother with volunteers?

(continued from page 1)

3. **Volunteers' motives are clear.** Staff members or paid solicitors may be perceived as merely doing their jobs. While a formal letter or courteous phone call from the development officer could go unanswered for months, an inquiry from a friend or business peer will almost always get a response.

When a volunteer issues an invitation or advocates for a cause, his or her charitable motives are clear.

4. **Volunteers provide accountability and credibility.** They are your eyes and ears in the community and the community's eyes and ears within the organization. Wise volunteers help to ensure that an organization's mission is meeting real community needs, while at the same time helping to ensure that the organization receives the recognition and support to sustain that mission.
5. **Volunteers work best with your staff.** Let's not discount the role development staff plays in this equation, through the cycle of fundraising: identification, cultivation, solicitation and stewardship. The most effective team approach combines the advantages of voluntary leadership with the oversight of professional management.

	Identification	Cultivation	Solicitation	Stewardship
Volunteers and Staff Working Together	Volunteers' contacts are enhanced with research	Prospects' movement toward commitment is managed astutely	Blends volunteers' influence and credibility with professional oversight	Volunteers' appreciation complemented by structured management
Volunteers Alone	Limited to the volunteers' social and professional contacts	Sincere, but often neglected, haphazard, or unfocused	Even effective volunteers may fall behind schedule or stumble when the time comes to ask	Sincere, but often neglected, haphazard, or unfocused
Staff or Paid Solicitor Alone	Targeting the "likely suspects"	Number of prospects who can be cultivated is limited by number of staff who can make calls	Gifts often smaller when personal connection is absent	Long-term relationships often neglected as staff pursues short-term goals



For more on: **The Role of Volunteers, Developing Effective Fundraising Leaders**, access Goettler Series **Volume 10** at www.goettler.com.

What kind of support do our volunteers need most?

Volunteers bring to us their commitment, enthusiasm, reputation, and relationships. As development professionals, what we can give them is the benefit of our knowledge and experience. To make our volunteers effective (which will keep them coming back), we need to ensure that they:

1. Know the organization and its purpose
2. Understand the case for support and the role of philanthropy
3. Understand their role and assignments, and how they fit into the overall fundraising plan and strategy
4. Know the prospect
5. Understand the basic principles and techniques of asking for a gift

In working with volunteers, we can never forget that *people give to people*. For that reason, it's more effective to provide experience than instruction. Plan to accompany your volunteer on his/her first visits with potential donors. Look for situations where the proposition is straightforward, and the probability of success is high. As your volunteer gains confidence, he/she will be able to handle more challenging scenarios.

Counsel can work with your organization to strengthen the functions that support all of the above elements, and integrate them into an effective program of volunteer recruitment, orientation, and training.



GoettlerAssociates

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How to Spot Effective Fundraising Volunteers

Identifying fundraising volunteers and leaders amidst your corps of volunteers is no simple process. Not all will have the ability or desire to be effective fundraisers, so when you identify someone who is willing and able, seize the opportunity.

Of course, not everyone who volunteers to assist with fundraising will possess all of the ingredients of success equally. It is incumbent upon professional staff to encourage the positive characteristics that volunteers have and compensate for those which are less evident. The most desirable traits are:

Influence: Volunteers should be well known and respected within the community, and capable of attracting attention and, ultimately, support.

Affluence and generosity: When a campaign leader makes a major gift it can set the pace for success. An effective volunteer will certainly demonstrate her generosity in proportion to her means, and in relation to the campaign goal, or the amount suggested.

Advocacy and Action: The volunteers' words and actions will speak loudly and inspire others, especially if they are authentic and reliable.

Wisdom: An experienced volunteer can transfer business and life experience to the fundraising process, helping a campaign avoid pitfalls and take advantage of opportunities.

Dedication: Noted fundraiser and author Harold J. (Si) Seymour observed that "Nothing is more dangerous than the second-class attention of a first-class individual." Fundraising requires a personal commitment to advocate for gifts, recruit others, and participate in campaign activities. Those who merely lend their name to a cause without dedicating their effort may think they're helping, but they will only inspire others to less.

Enthusiasm and eloquence: Many will rally to a cause when the leader is able to clearly articulate the case for support in a way that demonstrates personal enthusiasm and moves others to action.

Tenacity: A fundraising goal will most often be attained through healthy doses of rejection, because not everyone will give. A leader must be prepared to stick with the job long after the initial excitement has waned.

Wit: In the midst of difficult decisions or tense meetings, a leavening of laughter can keep everyone moving forward together.