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# **Working with Volunteer Fundraisers**

**By Tyrone McKinley Freeman and Beth Breeze**

When properly engaged and well managed, volunteer fundraisers can be vital sources of moral support and concentrated labor to maximize the success of fundraising programs. Their participation can help small fundraising shops extend the reach of limited staffing and budgets. They can imbue larger fundraising operations with energy and excitement. Volunteers can work directly with staff-driven fundraising programs or conduct their own supporter-driven fundraising outside of organizations. In either case, volunteer fundraisers provide notable resources to advance resource development in support of organizational visions and missions.

As a result of this chapter, readers will:

- Understand the strategic role and value of volunteer fundraisers
- Distinguish two main types of volunteer fundraisers
- Learn about volunteer trends
- Gain insight about volunteer motivations
- Understand the six steps for successful volunteer integration

Research from the Corporation for National and Community Service (CNCS) (2018) has repeatedly confirmed the connection between volunteering and other acts of civic engagement related to fundraising in the United States. According to the agency, volunteers donate to charity at two times the rate of non-volunteers. Their example of giving is essential for cultivating the interests of other potential givers. These volunteers do favors for their neighbors and good things for their neighborhoods at two times and three times the rates of non-volunteers, respectively. They are also five times more likely to belong to a civic group or community association than

their non-volunteering peers. Further, fundraising is the number one activity that volunteers report doing when they serve (CNCS 2018).

While these facts may be surprising to some, they demonstrate the investment volunteers have in their communities, and the social networks they can bring into fundraising programs. These qualities are in keeping with the volunteers' strategic role and value to fundraising.

### **Strategic Role and Value of Volunteer Fundraisers**

Volunteers represent an internalization of an organization's values that is vital for successful fundraising. They embody the mission and can serve as powerful advocates of its validity and impact because they are not financially compensated for their service and have no vested financial interest. Volunteers have their own lives, jobs, and many other responsibilities related to family, work, and community. The fact that they choose to serve an organization speaks highly of its work and should be utilized to support fundraising.

Volunteer fundraisers can play useful roles at any stage of the *Fundraising Cycle* (see Chapter 13), which is a powerful tool for engaging supporters. When examining the case for support, analyzing market requirements, and defining and validating needs statements and objectives, volunteers can serve as bell-weepers for assessing the local community's needs and responsiveness to particular cases for support. Through their local involvement as citizens they can provide insights to keep fundraising activities fresh and relevant.

When evaluating gift markets, selecting fundraising vehicles, identifying potential giving sources, and creating fundraising and communications plans, volunteers can provide recommendations, contacts, and other valuable inputs for decision making processes. Here, their belief in philanthropic support and example as organizational donors is paramount. Given the connection between volunteerism and philanthropic giving, fundraisers would be remiss in their

responsibilities if volunteers were not provided opportunities to add financial support to their contributions of time and talent. This is particularly true of volunteers involved with solicitation. Before asking others to give financially, they should be givers themselves.

With training and encouragement, volunteers can help solicit gifts, demonstrate stewardship, and renew gifts through strategic engagement with donors. Here, their linkages to donors and prospective donors are essential. The principle of *Linkage Ability Interest* (from Chapter 13) states that the greatest potential for a gift exists when a prospective donor has a linkage or connection to an organization, the ability to give at the desired level, and an interest in the cause. Volunteers can help make these connections and discern donor interests and giving capacities through their social networks. In support of prospective donor research, volunteers can help assess donor lists for likelihood of giving and help organizational staff build meaningful relationships with donors.

Volunteers can be powerful witnesses and organizational advocates when put before an individual donor, foundation officer, or corporate giving committee. They can passionately convey the importance of the mission, especially those who have personally benefited from it. Creating appropriate opportunities for sharing their enthusiasm can help solidify donor relationships and illustrate an organization's impact in personal ways.

The experience of nonprofits affected by external shocks, such as economic recessions and global pandemics, highlights the profound value of being able to draw on non-salaried help when faced with periods of financial insecurity or surges in demand for services. Being prepared for these moments, however, requires fundraisers to regularly think about meaningful volunteer engagement so that programs and teams can be built in this manner. There are two broad categories of fundraising volunteers:

- *Staff-driven*: Volunteers who have been recruited to help with fundraising efforts including administrative support, events, campaigns, and committee service. They fundraise on behalf of the organization and are authorized representatives.
- *Supporter-driven*: Volunteers operating independently to fundraise in aid of a nonprofit organization. Nonprofits may not be aware that these volunteers are holding events or crowdfunding campaigns until the final sum is passed on to the organization.

Whatever combination of ‘staff-driven’ and ‘supporter-driven’ volunteer fundraising is suitable for an organization, responsibility for all fundraising begins and ends with an organization’s board of directors (see Chapter 20). Integrating board members into the fundraising program is a central task for fundraisers to address.

This chapter focuses primarily on staff-driven volunteers, but fundraisers should also be prepared to engage with supporter-driven volunteers when made aware of their efforts. An awareness of volunteer trends is important for developing formal programs for volunteer fundraisers.

### **Volunteer Trends**

Volunteering is universal. The United Nations (2018) estimates that the annual hours of service produced by volunteers globally represents the equivalent of a labor force comprised of over 109 million full-time workers. Every day, these volunteers provide vital services and acts of care important to community life around the world. Only 30 percent of this volunteer work force participated through formal nonprofit organizations. The majority of this service to others was rendered person-to-person with individuals living outside the volunteer’s household. Together,

volunteers in Asia and the Pacific, Europe and Central Asia, and North America comprised 72 percent of the voluntary labor force. Across the globe, women dominate the volunteer ranks.

In the United States, 2018 CNCS data shows 77.4 million Americans (or 30.3 percent of the adult population) formally volunteer for nonprofit organizations, contributing nearly 7 billion hours of service worth more than \$167 billion in labor. This represents a significant increase in rates of volunteering over the past decade. In response to the 9-11 national emergency in 2001, American volunteerism grew. The deep recession later in that decade reversed this trend. Steady decline following the recession continued into 2015 with a low of 24.9 percent of the population volunteering. The 2018 nearly 6-point boost in volunteerism was a positive sign, but it occurred prior to the Covid-19 global pandemic of the early 2020s, which wreaked havoc on the global economy and nonprofit organizations reliant upon volunteers.

In the early weeks of the pandemic, Gallup reported a decline in American volunteerism to 58 percent from 64 percent three years prior (Jones 2020). However, VolunteerMatch (2021), the popular recruiting website, surveyed users during the pandemic and found that just as the rest of the economy went virtual due to shutdowns and quarantines, so did volunteerism as supporters connected online with nonprofits. People also assisted others in their communities. Numerous media reports about volunteers' grocery shopping for struggling neighbors and making masks for first responders captured ways in which citizens responded to the crises as governments were overwhelmed (U.S. Bureau of Labor Statistics 2020). However, the long-term effects of the pandemic on volunteerism remain to be seen.

Most American volunteers give their time to religious organizations (CNCS 2018). Sport, hobby, arts, and culture organizations are the second largest sites for volunteer service followed by educational and youth-serving organizations; civic, political, professional and international

organizations; hospital and other health organizations; public safety organizations; and environmental and animal care organizations. In keeping with global trends, American women gave 3.9 billion hours of volunteer service, while men gave 3 billion hours. Demographically, Generation X leads American volunteer rates (36.4 percent) followed by Baby Boomers (30.75 percent), Millennials (28.2 percent), Generation Y (26.1 percent) and the Silent Generation (24.8 percent).

### **Volunteer Motivations**

Before attempting to manage volunteer fundraisers, staff need to understand them. People volunteer for many reasons, including those related to valuing particular organizational missions, wanting to learn, interacting with others, developing employable skills, and coping with difficult life experiences (Musick and Wilson 2008). Many volunteers have altruistic desires to make a difference through service and be part of programs positively impacting community life. Some volunteer by utilizing special knowledge or skills in order to develop themselves personally or professionally (Fashant and Evan 2020). Volunteerism is also an avenue for acquiring new skills, gaining meaningful work-related experiences, and developing networking opportunities that may lead to employment or promotion (Faletahan, van Burg, Thompson, and Wempe 2020). Many professionals also volunteer as they transition from work to retirement, and retirees often increase their volunteer commitments to fill portions of their newly available time (CNCS 2018). Volunteerism can fulfill a need for camaraderie, belonging, and greater life satisfaction from being helpful to others. These motivations are not mutually exclusive. Indeed, volunteers often have both self- and other-oriented motives animating their service.

Volunteer service can be integral to the success of an organization's fundraising efforts. Major donors and employers are two sources of highly motivated volunteer labor for fundraising.

Major donors can be effective peer ambassadors because of their preexisting relationships with organizations and other potential donors. Those that become involved as volunteer fundraisers are motivated to make a practical difference for a nonprofit they are passionate about by using their access to networks of wealthy people and their personal credibility to ask for sizeable gifts (Breeze and Lloyd 2013).

Employee fundraising is a common feature of fundraising around the world (Breeze and Scaife 2015) and is comprised of numerous programs often including corporate matching-gifts. Programs typically include workplace giving, donations to nonprofits where employees volunteer, and disaster relief (CECP 2020). Money donated in the name of a corporation is often raised by staff who solicited colleagues and customers. ‘Shop floor’ employees are increasingly involved in selecting which nonprofits will benefit from these efforts, leading to choices based more on personal experiences and philanthropic preferences rather than corporate goals (Breeze and Wiepking 2019). Employers facilitate these efforts in order to support the communities in which their staff and customers live, and also to secure additional benefits relating to marketing, personnel recruitment and retention, and enhanced corporate reputation (Gautier and Pache 2015).

Whether volunteer fundraisers originate from employer or major donor relationships, professional fundraisers must be prepared to manage varying motivations, conflicts, needs, and expectations in order to maximize the volunteers’ experience and impact.

### **Six Steps for Successful Volunteer Fundraiser Involvement**

Effectively utilizing staff-driven volunteers in fundraising requires planning and ongoing attention. Recalling the Fundraising Cycle, the six steps in this section (see Figure 22.1) offer a process for maximizing the engagement of staff-driven volunteers. Supporter-driven fundraising



volunteers are, by definition, outside organizations' direct control but the following advice can still be relevant for supporting, acknowledging, and retaining them.

<<INSERT Figure 22.1 Six Steps for Successful Volunteer Fundraiser Involvement here >>

#### *Step One: Determine the Organization's Needs*

It is essential to clarify what kind of voluntary fundraising help is needed. Volunteers do not take a salary but they do incur costs, notably staff management time, which must be accounted for to ensure a net benefit. To avoid volunteer-driven drift, fundraising strategy must remain central. Consult the Fundraising Cycle to identify the specific areas where volunteer fundraisers may add value to program planning and implementation. Consider donor development and review the specific donor identification, cultivation, solicitation, and stewardship activities where assistance from volunteers is needed to advance a campaign. With key needs identified, fundraisers will be better able to properly channel volunteer energy into the optimal fundraising activities.

This step also includes legal considerations and researching best practices to help guide volunteer engagement. This information can then be operationalized through development of policies and procedures. For instance, organizations working with children and vulnerable groups commonly require background security checks for volunteers who might interact with beneficiaries. Privacy, confidentiality of donor records, and basic ethical practice are some areas to address early in the volunteer fundraiser planning process.

#### *Step Two: Identify and Recruit Volunteers*

After establishing the parameters of volunteer service, it is time to seek interested individuals. Some use informal methods, such as word of mouth and social media, or advertising through organizations that promote volunteerism such as local United Ways, community

foundations, service clubs, and corporations, to seek one-time volunteers for simple tasks.

Volunteers may also come from within existing organizational networks. They can rise in their levels of engagement from other areas of the organization. For instance, letting donors know that volunteers are needed can enhance efforts to attract interested participants. Becoming involved as volunteers should strengthen donors' overall commitment to the nonprofit if it is a fulfilling experience and may generate benefits in positive psychological well-being (Konrath 2014).

Volunteers on advisory councils or in program and service-related roles may be interested in participating in some fundraising capacity as extensions of their commitments.

For significant volunteer roles, such as chairing a capital campaign committee or running a major fundraising event, it is important to develop detailed job descriptions. For more transient and less risky tasks, such as seeking helpers for a fundraising event who may greet guests or set up decorations, activity descriptions can be simple. Whatever the scale and nature of the role, pay attention to achieving a good fit between potential volunteers' skills and preferences, and the tasks that need doing. A gregarious volunteer will be frustrated if asked to process event registrations alone in a room, a task which could be well-suited to a volunteer who prefers—or needs—to do their volunteering from home.

### *Step Three: Welcome and Develop Fundraising Volunteers*

After volunteers are recruited, providing orientation and training helps them feel welcome and gain the necessary skills and knowledge to become effective team members. Volunteers will have different training needs based upon their roles and history with the organization, but all should receive sufficient organizational information to help them thrive. A firm grounding in the mission, operations, programmatic needs, case for support, and cultivation and solicitation techniques is necessary for interacting with donors. To ensure that staff act

ethically and fairly towards all volunteers it is important to have formal policies covering topics such as recruitment (including diversity, equity, and inclusion considerations), training, expenses, supervision, health and safety, confidentiality, and complaint procedures (Galloway 2019).

Offer continual opportunities for volunteers to gain deeper knowledge. Use volunteer job descriptions and work backwards to create training opportunities aligned with the tasks to be completed. Also, more experienced volunteer fundraisers can help induct newer ones, which reinforces knowledge and builds relationships for both groups.

For volunteers interested in direct solicitation, plan to gradually increase their activities. It is best to begin by involving these volunteers in non-solicitation tasks such as making thank you phone calls, inviting friends to events, and accompanying staff on donor visits before conducting face-to-face solicitations. Further, fundraising volunteers should be oriented to gift acceptance policies.

#### *Step Four: Ensure Meaningful Engagement*

Make volunteer assignments and communicate expectations in ways that are mindful of individual interests, talents, and temperaments. For volunteers to find meaning in their service, they must feel connected to their work, capable of successfully completing it, and find it personally enriching. If a younger volunteer is seeking suitable experience to build their resume, or an older volunteer is seeking a companionable environment, determine if the organization can realistically meet those needs. If not, it is important to be clear up front to avoid disappointment and possibly ineffective volunteer service. Similarly, never miss an opportunity to connect volunteers' contributions to the mission.

Do not forget to provide ongoing training, validation, and support as necessary throughout the course of volunteer assignments. The goal is not busywork, but to meaningfully engage volunteers in advancing the mission.

*Step Five: Manage Fundraising Volunteers' Performance*

Volunteers, like salaried employees, must be managed, but the process is different and lacks financial remuneration and other considerations. Volunteers likely want to feel ownership of their tasks and also need the backing of the organization to be successful. Be aware of generational differences. For example, Millennials may well prefer and perform better with more flexibility and more empowerment to be self-directed in what they do (Saxton et al. 2015).

Keep closely in touch with volunteers, especially at the planning and evaluation stages of fundraising activities. Regular reviews, which can include informal chats, can help ensure that the role is meeting their hopes and expectations. These conversations can also help reveal other skills and connections held by the volunteer that could enhance their contribution and the organization's volunteer efforts (Galloway 2019). If areas of concern arise in relation to their work, provide constructive feedback, specific recommendations, and support to facilitate the desired changes. For those who continue to struggle, it may be necessary to provide further training, to identify a different mode of service, or to terminate the volunteer relationship altogether. These can be difficult conversations but sometimes can come as a relief to volunteers who are already aware of an issue. Expressing deep appreciation for a volunteer's contributions and explaining changes as related to organizational needs, may assuage the volunteer's feelings in other cases.

### *Step Six: Recognize and Retain Fundraising Volunteers*

The final step in successful fundraising volunteer involvement is to provide ongoing personalized recognition. Express thanks regularly so that volunteers feel known and appreciated. Marking milestones, such as after their first fundraising event or following their participation in soliciting a significant donation and celebrating anniversaries of service are important. If they make behind-the-scenes contributions, such as maintaining the donor database or training other volunteers, explain the results of that work—for example, new income, a stronger organization, and positive impact for beneficiaries.

As much as feasible, recognition should be tailored to suit each volunteer. Some will enjoy public recognition, such as thanks at staff meetings, being featured on the website, or honored at an event. Others may prefer private recognition, such as a handwritten note from the organization leader or from beneficiaries (if appropriate). Research shows that people who regularly volunteer are less concerned about enhancing their public image, so private incentives may be preferable to public ones (Exley 2018). Regardless of its form, recognition is essential to supporting volunteers, ensuring their satisfaction, and showing appreciation for their service.

While there are many external factors beyond fundraisers' control that influence volunteer attrition, research shows that volunteers tend to end their involvement due to poor matches between their skills and available volunteer activities; inadequate acknowledgement and recognition practices; poor training and support; and inadequate leadership and supervision (Eisner et al. 2009). Unlike other external factors such as volunteer time constraints, these factors can be avoided if fundraising professionals demonstrate care for their volunteers by providing orientation, training, support, and recognition.

### **Conclusion**

Helping nonprofit organizations to raise funds is one of the most common types of volunteering across the world, and volunteers are also likely to be donors themselves. Through their freely chosen and uncompensated involvement, volunteers embody passion and commitment to the cause, which is inspirational to potential donors, and therefore adds special value to fundraising efforts.

All types and sizes of non-profits can successfully recruit and retain volunteer fundraisers, as John Ramsey, co-founder of the UK Association of Volunteer Managers, explains, “Brilliant volunteer involvement isn’t the preserve of money-rich organisations, it’s the preserve of people-rich organisations” (cited in Saxton et al. 2015, 2). Professional fundraisers should make every effort to create meaningful opportunities to involve volunteers across the Fundraising Cycle, using the six steps in this chapter. Not only will volunteers help secure resources to fulfill nonprofit missions, they can become trusted advisors and allies for fundraising, within the organization and beyond.

### **Discussion Questions**

1. What distinctive value can volunteer fundraisers provide to organizations? List three ways in which volunteer fundraisers are best placed to assist with securing resources.
2. What is distinctive about the motivations of volunteer fundraisers? How can this information aid organizations in identifying, recruiting, and retaining volunteers?
3. Which step in the six steps for successful volunteer fundraiser involvement seems most challenging and why? What are some ideas for addressing the challenges?

### **Application Exercises**

1. Find a volunteer handbook for an organization online and compare it to the six steps of volunteer engagement. Write a one-page analysis of the manual and how well it is or is not in alignment with the six steps. Consider what the manual reveals about how the organization thinks about volunteer motivation, training, and recognition.
2. Use the six steps to interview a volunteer who has fundraised in an official capacity with an organization. Develop one question for per step in order to ask about their experience with organizational needs, being recruited, being oriented and trained, having meaningful engagement, receiving feedback on their contributions, and feeling recognized. Consider their responses and reflect upon the how the interviewee's comments could help you best support volunteers.
3. Brainstorm some imaginative ways of recognizing contributions of volunteer fundraisers. Develop a list of three ways each to meaningfully recognize a) the corporate executive who volunteered as chair of a fundraising campaign committee; b) the celebrity guest who served as an event MC; and c) the college student who made phone calls to donors during a thank-a-thon.

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