

Effective Use Of Volunteers: Who, Why, When And How

As with any other resource, the wise and creative management of volunteers can contribute significantly to make an operating and human difference for the non-profit involved.

By Mark London, director of marketing
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According to the American Association of Fund-Raising Council, over 92 million Americans — or almost two in five — give of their income, energy and time annually for more than 690,000 gift-supported organizations.

The assignments of volunteers cover a broad gamut: They range from the task of soliciting a modest gift for the annual campaign, to the leadership of a multi-million-dollar capital campaign.

The requirements for these assignments also vary greatly. For a solicitor seeking an annual gift, a bare acquaintance with fund raising could be adequate; for a capital campaign chairman, a comprehensive understanding of fund raising would be useful, if not essential.

The word "volunteer" is derived from the Latin verb "volo" meaning "to will" or "to wish." A volunteer is someone who wishes to give of his various talents, to something he feels worthy of them.

Five key traits common to volunteers at all levels are:

- A commitment to a cause or institution which the volunteer is prepared to meet through personal and financial effort
- The desire to meet a challenge head on — and win
- A wish to contribute to a "common good"
- Availability of spare time
- Ego gratification that follows after success

Psychologists say people volunteer because they need to affiliate with others, to be recognized and appreciated, in order to reach full individual potential. Consider one volunteer's viewpoint:

"If you want my loyalty, interest and best efforts, remember that:

- I need a sense of belonging, a feeling that I am honestly needed for my

total self, not just for my hands, nor because I take orders well.

- I need to have a sense of sharing in planning our objectives. My need will be satisfied only when I feel that my ideas have had a fair hearing.

- I need to feel that the goal and objectives arrived at are *within reach* and that they make sense to *me*.

- I need to feel that what I'm doing has real purpose or contributes to human welfare — that its value extends even beyond my personal gain, or the hours I give.

- I need to share in *making the rules* by which, together, we shall live and work toward our goals.

- I need to know in some clear detail just what is expected of me — not only my detailed task, but where I have opportunity to make personal and financial decisions.

- I need to have some *responsibilities* that *challenge*, that are within range of my abilities and interest, and that contribute toward reaching my assigned goal, and that cover all goals.

- I need to see that *progress* is being made toward the goals *we* have set.

- I need to be kept informed. What I'm not up on, I may be down on. (Keeping me informed is one way to give me status as an individual.)

- I need to have confidence in my superiors — confidence based upon assurance of consistently fair treatment and recognition when it is due.

Top-echelon campaign leadership is, for the most part, voluntary. Although most fund-raising leaders are volunteers, not all volunteers are enlisted to be leaders.

There is an old axiom in fund raising: all volunteers should be selected on the "3 W" principle of **wealth, wisdom, and work**.

Fund-raising leaders cannot carry the total burden of a campaign, however small. They need the consistent and reliable aid of a corps of volunteer workers who accept the responsibility and share in the planning of campaign activities which culminate in obtaining a gift commitment from a prospect.

The "care and feeding" of volunteers is a gentle art that requires human insight, bolstered by considerable skill in persuasion. The essential psychology to employ is to invite the volunteers to share in a group activity to promote the welfare of a worthwhile institution.

A potential volunteer's interest can be deflected if he is asked simply to serve on a committee. The left-handed dictionary states that a committee is a group that keeps minutes and wastes hours.

Next to mothers-in-law, Congress and the IRS, few groups are referred to more disparagingly than committees. Consider these definitions: "A committee is made up of the unfit selected by the unwilling to do the unnecessary" and a committee is "a place where the loneliness of thought is replaced by the togetherness of nothingness."

Committees indeed are badmouthed, yet they are as prolific as fleas on a dog. If they are such repulsive beasts, why



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A UJA Job Description: The Campaign Chairman

These are the criteria for a successful chairman:

- 1) Willingness to put in the necessary time.
- 2) Willingness to learn the needs of your fellow Jews, and the techniques that make for success in fund raising. For instance, be prepared to participate in leadership training and solicitor seminars and briefings. These are minimum expectations for you to do your job effectively.
- 3) Enthusiasm to motivate volunteers to achieve goals.
- 4) Willingness to be solicited face-to-face by an overall Campaign leader for a personal contribution which is perceived as an appropriate gift by your peers.
- 5) Ability to create a campaign structure which provides significant work, training, and growth for volunteers. (See suggestions for campaign division structure in the Campaign Planning guide.)
- 6) Management Skills — become involved in the recruitment, training, and assignment of volunteers; manage leadership continuity; be sensitive to the needs and skills of new workers as well as past leaders.
- 7) Solicit leaders, key workers, and givers in the division — at least seven, face-to-face.
- 8) Develop and execute a campaign plan: short-range — immediate campaign plan; long-range — setting goals, leadership continuity, worker recruitment, young leadership.
- 9) Maintain a productive working relationship with the campaign professional.
- 10) Follow-up workers on fund-raising assignments.
- 11) Visit Israel on a UJA-Federation mission and visit Federation agencies — most important.
- 12) As a leader, be accessible by phone and in person to other leaders, campaign professionals, and all those who volunteer their time in your division.

This is part of the Campaign Chairman's Manual, which every candidate for chairman is asked to read, prior to consideration or acceptance of the post.

then are there so many? Why can no organization function without them? The parts get more done in less time than the whole.

Committees provide the structural framework for performing specific tasks or solving problems. That improves the odds for achieving at least some results. And, because committees are smaller groups, they have greater flexibility to meet and adapt quickly to both the organization's changing needs and demands, and those of the community it serves.

Well-structured, well-managed committees also:

- Permit all members broader participation in the organization's operations;
- Utilize members' special interests, knowledge, talents and skills;
- Allow greater diversity of ideas which increases the number of potential solutions to any problem;
- Facilitate decision-making and action;
- Provide continuity and organiza-

tional memory, an on-going structure to offset rapid personnel turnover;

- Address such individual volunteer needs as affiliation, recognition and individual growth;

- Increase esprit de corps, and distribute responsibility for a given task, which avoids overwhelming a single member or threatening the less assertive volunteer.

When managed skillfully, committees aid the organization.

However, committees can be and more often are too large, too numerous, poorly structured and/or poorly managed. They then constipate the organization and become sluggish, cumbersome, tedious, indecisive, and expensive.

Volunteers should — must understand and take seriously the role of the committee and its members, so when called upon, the volunteer will fit in and be willing to do the essential.

The basic requirements to ensure fit management of committees include: clearly defined and limited direction, scope, authority and time frame; appro-

priate size, good chairman; interested and responsible members.

A committee must know *what* it is to do. Is it to make a decision, prepare recommendations or just brainstorm? What subject matter is it to consider? There'll be little effective action unless the committee knows its job.

How long does a committee have to complete its work? Organizations often make the mistake of leaving the time limit for decision making or action, open-ended. Action is facilitated by specific deadlines. The committee must act or disband after an appropriate, clearly-defined amount of time is spent on necessary research, discussion and deliberation.

If there is one thing you really have to have in successful fund raising, it's exciting leadership.

Leadership is not just ornamentation. It's not merely "inherited respectability".

Winston Churchill said "Great leadership seems to have an affinity for the great event and the mighty crisis".

The bigger the cause may be and the bolder its objectives, the more likely it is that a top leader will emerge. This top leader will bring warmth and confidence to the cause. He/she has a way of attracting the interest and loyalty of effective and devoted lieutenants. They know what the committee system is for and how to use it. And by the example of their own words, deeds, and gifts, they help to set high standards of performance and thus invoke a broad and adequate response of enthusiastic support. They also never doubt the ultimate victory.

Where do you find such leadership?

Generally, campaign leadership should be found in the family. The courtship of good leadership is seldom easy, and may necessitate approaching a whole series of choices. The warning is to keep all such hunts secret. Because when the word gets around that several have been asked and have turned the job down, the difficulty of enlisting the right kind of leadership becomes needlessly compounded and sometimes insurmountable.

Your chairman is crucial to a successful organization or committee. He or she:

- Leads in setting committee goals and objectives; establishing strategies to meet goals and objectives; defining the work program and monitoring its progress;
- Understands the decision-making process and knows how to lead the committee through it;
- Plans committee meetings, prepares the agenda, and arranges meeting time and location for maximum group convenience and effectiveness;

- Prepares and distributes the necessary materials and information for the committee to begin its work and delegates responsibilities and tasks to appropriate committee members;

- Conducts the meeting firmly, but flexibly;

- Draws all committee members into the discussions;

- Keeps the discussion on track;

- Avoids imposing his or her opinions;

- Is sensitive to the needs and positions of other committee members;

- Sees that complete, accurate minutes are taken at each meeting and distributed to members promptly;

- Sees that costs are held within budget;

- Communicates often and in appropriate detail with the rest of the organization.

The committee and the organization will be in trouble if this individual is not selected carefully.

Remember — the ways of effective voluntary organizations are seldom the ways of a democracy. You don't *elect* people for this work; you *pick* them.

As logic and purpose dictate a particular committee's existence, so should members have valid reasons for serving on that committee. Who wants to serve on a committee whose work is personally alien, distasteful, or incomprehensible? Or, simply because the committee needed a body quota and because the volunteer needed to serve on a committee to fulfill a membership requirement?

In contrast, an interested, responsible volunteer brings experience, ideas and a positive attitude. The volunteer also:

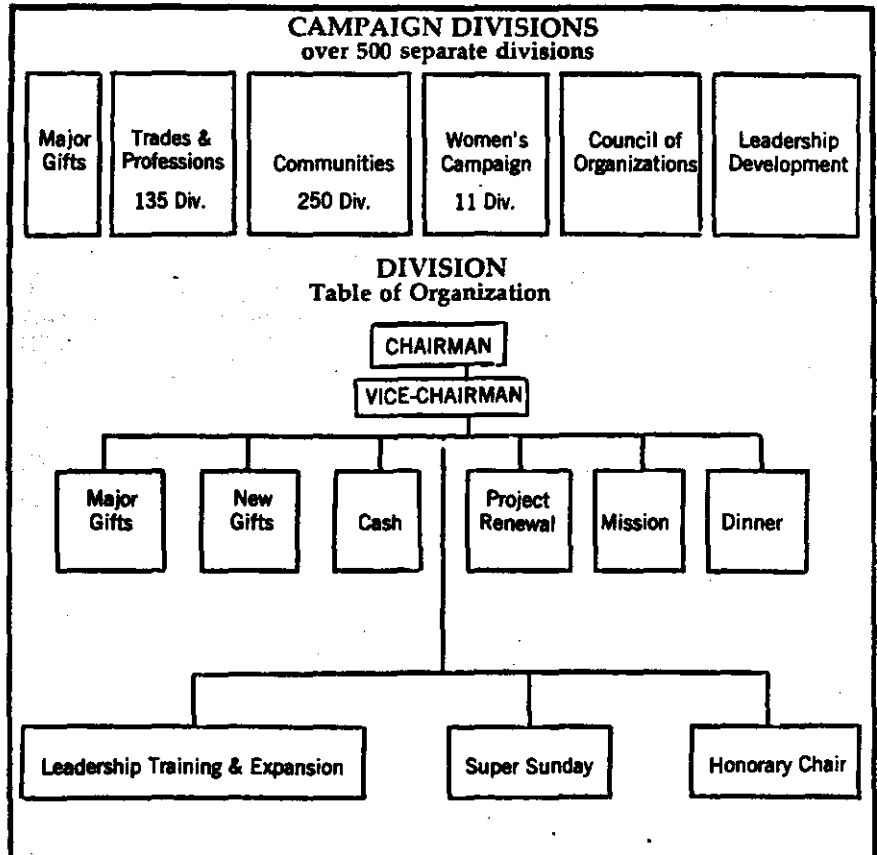
- Attends committee meetings regularly and punctually;

- Knows and accepts the committee's charges and the issues involved in its work;

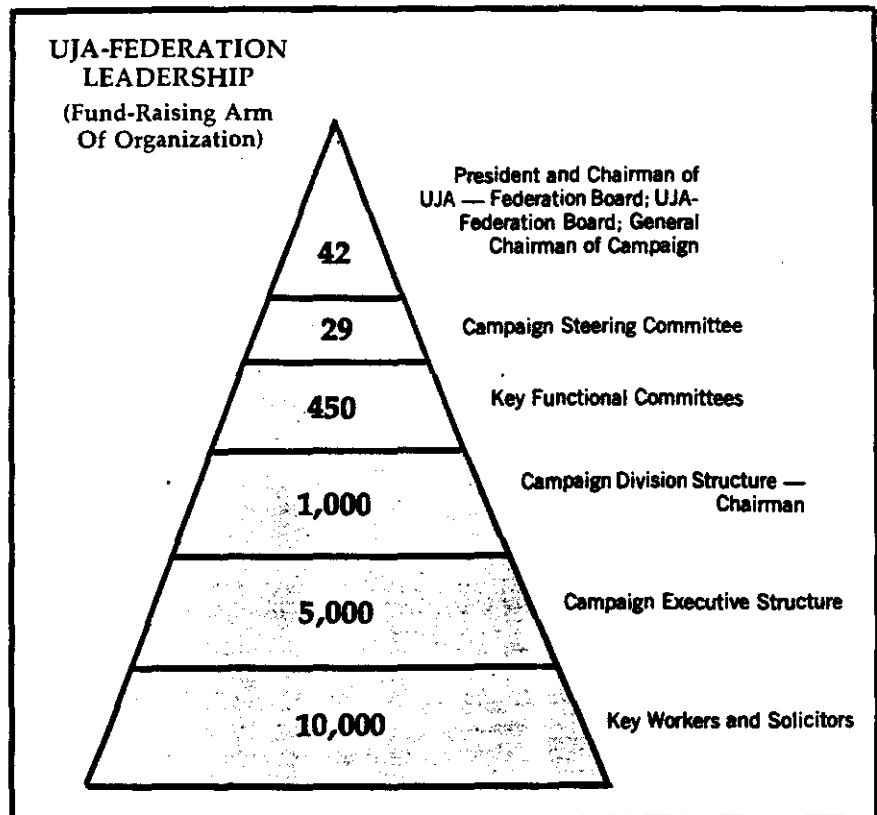
- Accepts and carries out responsibility for delegated tasks within the assigned time frame;

- Takes an active role in committee discussions and selecting alternative courses for action;

- Learns how to gather, assimilate and evaluate data for making decisions;



Detailed organization within campaign divisions is a key to the prudent and effective use of volunteers for the United Jewish Appeal — Federation Campaign.



Leadership of the United Jewish Federation, the fund-raising arm of the organization, reflects the numerous volunteers contributing talents to the campaign.

● Is accountable to the committee chairman for use of organization resources (money and material);

● And is cooperative with, responsive and sensitive to other members of the committee.

If there is an art here, it is more an art of public relations than anything else, involving pride, recognition, optimism, universality and dramatization. And the higher you hold your standards, the better people will perform. Remember, the best of the volunteers always have the inescapable limitations of diversity of interest, limited attention periods, and secondary responsibility. These factors should never be overlooked in your planning and never forgotten while the show goes on.

As far as committee work is concerned, most people clearly prefer the pursuit of happiness to the happiness of pursuit. Only about a third of those who enroll perform with little prodding; another third act "effectively or moderately so with some needling"; and the other third "are no good at all and not worth the time to call them up".

Remember causes don't need workers so much as they need "informed and dedicated advocates."

Also, all the old studies have shown that there is a direct relationship between the number of workers and the final amount of money raised.

To give you a little background — United Jewish Appeal is an umbrella organization that raises funds to support 133 organizations in New York City, social programs in Israel and around the world. There are a total of 700,000 Jewish households in our coverage area, the largest concentration of Jewish population in the world — even larger than that of Israel. In 1984, we received \$116 million from a total of 125,000 gifts. We raised all together, in the 1984 campaign year, 122 million. To give you an overall view, nationally, UJA raised 600 million. We are the largest single fund, raising the largest amount of money in the country.

As with any business this size, division of labor is critical. Our territory — Greater New York including the five boroughs of New York City plus Westchester, Nassau and Suffolk counties — cannot be addressed as a whole. It must be broken into manageable units to assure coverage and quality of campaigning. These units we call divisions and there are over 500 of them. As an example, in our Trades and Profession segment, we have 135 divisions; in our communities segment, 250 divisions, and within our Women's Campaign, 11 divisions.

The overall campaign is organized to

maximize our opportunities to reach and attract every prospect, and to provide volunteer opportunities to everyone who wishes to participate, in addition to contributing. We are working with almost 20,000 volunteers, which, I believe is probably the largest group of any single fund raiser in the country. Now, I'm talking about volunteers spread over our three organizations: United Jewish Appeal, the Federation of Jewish Philanthropies of Greater New York and the United Jewish Appeal Federation Campaign.

Always keep in mind the volunteers' viewpoint, if you want their loyalty, interests and best efforts. Don't be afraid

to work with volunteers, but remember it is hard work. ●

Missing Children Service Signs With Agency

Richard Parker & Associates, 680 Beach Street, #415, San Francisco, CA, 94109 — 415/441-6866, a direct marketing agency, has announced the signing of The Kevin Collins Foundation for Missing Children, located in San Francisco. The Foundation is unique in that it offers assistance to parents and officials with mobilization for search and rescue of stranger-abducted children.

WHO SHOULD CONDUCT YOUR NEXT TELEPHONE FUND-RAISING OR SALES CAMPAIGN?

The Philadelphia Orchestra selected a consulting firm that they could trust to tailor a campaign to meet their specific fund-raising, public relations, and marketing needs.

So did the Pennsylvania Ballet, the Walnut Street Theatre, the Academy of Natural Sciences, and other arts and cultural organizations.

Also, some of America's highest ranked educational institutions were just as careful to make the best business decision. Among them are the University of Pennsylvania's Wharton School, the Penn Law School, the Pennsylvania Academy of the Fine Arts, and Bryn Mawr College. The name of the consulting firm? Telefund Management Incorporated.

What else do these organizations have in common? Successful, cost-effective results on every level.

How has Telefund Management become one of the nation's fastest growing non-profit telemarketing firms? Easy. We have taken a basic concept, telemarketing,

and made it better. We are innovators. Our scientific testing and research always ensure that the services we provide are the best available in the industry.

Our broad experience guarantees we will design and implement a fund-raising or marketing telephone campaign specifically for your organization.

Whether from our in-house telemarketing facility or on-site at your offices, we will meticulously develop the tone and message that you believe will be most appropriate.

And, by employing advanced training techniques, we ensure that each representative will be best prepared to handle your constituents' questions and objections.

Before handing the baton to the person who will conduct your telephone project, make sure that it will be in good hands.

For more information, call us collect or write. We will be happy to give you all of the information you need to make your job easier.

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