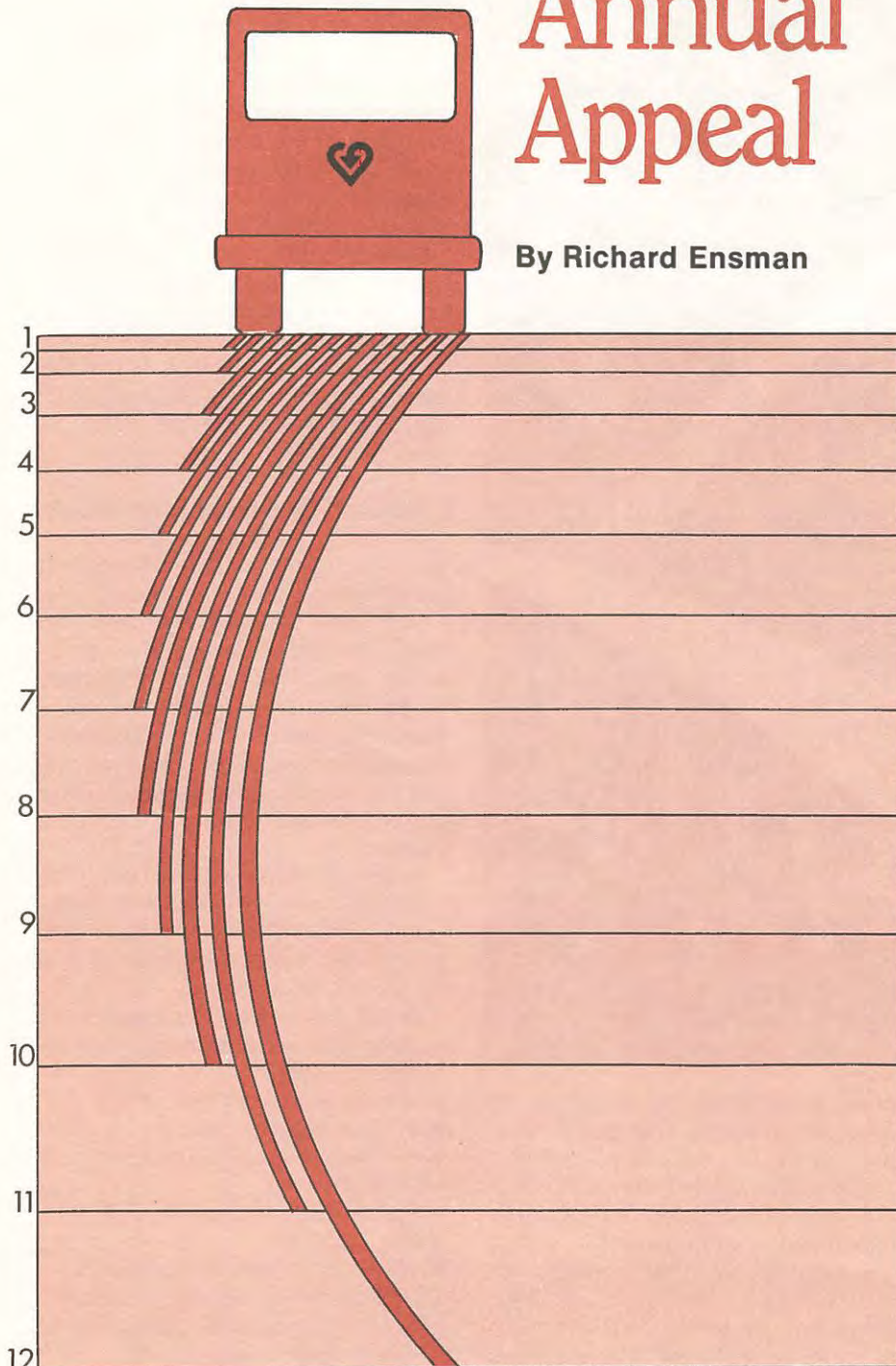


Recruiting Volunteers Through An

Annual Appeal

By Richard Ensman



THE RESULTS OF THE APPEAL were superb. Twenty-seven pledges arrived in the morning's mail. The evening telephone effort resulted in 56 more pledges of support. More than 50 percent of the donors made personal comments about the value of the agency's work. Early returns clearly indicated that this year's appeal would easily be the most successful in history.

Is this the story of a well-orchestrated annual fund drive? Are all the indications of success an expression of financial support from a committed constituency?

Not at all. This is the story of another kind of appeal—an annual appeal for the time and talent of volunteers. And, as every agency administrator knows, volunteer support is extremely important—sometimes even crucial—to the success and growth of agency programs.

The "annual volunteer appeal" is not really a novel concept, yet it is not frequently used by agencies in the 1980s. That's surprising given the relative advantages of such an approach.

From the standpoint of volunteer coordinators, one annual "push" for volunteers saves lots of time and money. Day-to-day or week-to-week recruiting becomes unnecessary, leaving time for the all-important tasks of training and supervising men and women who choose to give their time and talents to the agency. An annual volunteer appeal is much easier to publicize, too. It's next to impossible to make a big media splash—with letters, phone calls, newspaper announcements and special editions of newsletters—every time an agency wants to recruit a volunteer envelope stuffer. But, if the envelope stuffer—and 99 other volunteers—are going to be recruited all at once, a big publicity push is not only possible, it is also relatively easy.

From the standpoint of prospective volunteers, the annual appeal is ideal. Each can see the entire range of volunteer needs an agency has and can pick and choose assignments without fearing that "better opportunities" will come up a

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week later. The annual appeal also serves as a kind of guide to people interested in volunteering; many appeals actually arrange volunteer jobs in "catalog" fashion, with brief job descriptions, duty hours and expected levels of responsibility attached to each catalog entry.

Annual volunteer appeals can quickly become part and parcel of the agency's lore and tradition. People look forward to the appeal. It generates excitement and commitments of time and talent.

Creating An Inventory of Volunteer Positions

Before an appeal can be conducted, however, someone in the agency—the volunteer coordinator, the chief executive, the program director—must have a listing of all prospective volunteer jobs. It's amazing how loosely organized the volunteer program can be in so many well-managed nonprofit organizations! A few simple steps can yield an organized, complete listing of volunteer jobs.

First, all staff in the agency must know that an appeal is coming up and that centralized volunteer recruitment will take place.

Second, staff utilizing the services of volunteers should be asked to prepare simple, but complete, job descriptions for each volunteer position available. They should contain the same level of depth and professionalism that a staff job description would contain. And, that's not all. These job descriptions should contain summaries of qualifications (personal and professional), as well as lines of supervision and accountability, expected work hours, and any non-financial compensation (for example, educational programs, special training experiences, or public recognition) involved in the position.

Third, these job descriptions can be forwarded to the person responsible for the annual volunteer appeal with a request for a certain *number* of volunteers. The appeal coordinator, of course, has to review all of the descriptions and prepare simple summaries of all volunteer positions for the appeal itself.

Finally, once this system of centralized recruitment is in place, an ongoing master list can be used to track volunteer positions—filled and unfilled, recognition or award dates, anticipated start and termination dates of particular volunteers, and other logistical needs of the volunteer program. The master list is

really nothing more than a comprehensive inventory of positions, kept up to date on an ongoing basis.

Preparing for the Appeal

A volunteer appeal need not be an elaborate or time-consuming affair. A small agency could prepare an appeal with a minimum of expense and effort, provided a design for appeal materials exists.

Two broad areas of concern are paramount in this phase of the recruitment effort—recruitment materials and lists of prospective volunteers.

First, an overview of materials. A volunteer appeal is really nothing more than an appeal for resources—in this case, time and talent. An appeal for volunteers can be modeled after an appeal for funds. Using the standard format of a direct mail fund raising appeal, the volunteer appeal would consist of five elements.

The **appeal letter** is probably the most important of these. Usually two pages in length, this letter describes—in general terms—the needs of the agency and the vision of its leaders. The terminology and tone of the letter should be geared to the needs of the potential readership. An older, more traditional audience, for instance, might respond most favorably to an appeal stressing the agency's heritage and competence. A readership consisting of professional people in their 20s would probably respond most favorably to an appeal stressing the challenges and excitement of the agency's work. These images are, of course, stereotypical, but the appeal letter should be written with the agency's audience in mind. Only when the reader sees the agency's values and virtues "merging" with his or her own will an appeal be a major success.

The **volunteer brochure** is another vital piece in the direct mail appeal. This brochure contains the listing of volunteer positions, hopefully described in vivid, colorful terms. A short sentence or paragraph should accompany each volunteer position entry. Something like this, perhaps:

RECEPTIONIST. For senior adult recreation center. Greet visitors and callers—approximately 20 telephone calls and 15 visitors a day. Light filing and typing. A chance to greet and meet a wide variety of people—people with problems and needs (and smiles). Six hours per week. Ideal for a warm and caring person. Intensive training is provided.

The brochure can be prepared in list form, or if the agency wants to make the material a little bit more exciting, it can be prepared in catalog form (small booklets of four or eight pages with volunteer positions listed inside), it can use artwork (for instance, sketches of children could accompany descriptions of youth service volunteer positions), or it can describe the volunteer jobs on small cards, with one position per card.

Sometimes positions can be arranged by program or activity; sometimes they can be listed randomly; there is no standard format. Both approaches seem to generate interest and wide readership.

The volunteer brochure can be an attractive and novel description of volunteer activities available in the agency. It can be a chance for the agency to use its own creativity and imagination in placing its needs before the public. More important, even, the brochure can be used throughout the year—it is not limited in scope to the volunteer appeal.

The **response device** is the card that appeal readers will use to sign up or express interest in volunteer positions. If there's a large number of positions available, design of this card could be tricky. Usually, the response card in a fund raising appeal is a somewhat stiff piece of paper about 8-1/2 by 3-1/2 inches. It fits comfortably inside a Number 10 (business size) envelope and the reader's name is imprinted on the card, appearing in the window of the Number 10 envelope. This format is ideal, of course; anything with the reader's name already imprinted on it will help to create a sense of personalization and induce greater response rates.

The response device might simply leave a space for readers to write in the volunteer position(s) they like. Or, a numerical code might be used, with readers invited to circle the number(s) corresponding to particular positions.

Whatever approach is taken, it is important that some motivational material appear on the response card. "Yes, I'm going to support the work of the XYZ Agency with a gift of my time this year," or "I love people and I'd like to work with them. My area of interest is checked below." Again, such statements help to personalize the appeal and elicit strong reader sentiment. Some response devices use photographs or sketches along with this material.

The **exterior envelope** is the Number 10 envelope containing the appeal.

(Usually a Number 10 is used, but an agency could adopt a different format; a Number 10, however, is the perfect size for most letters and brochures.) This envelope might simply be a standard agency envelope—or it might be a variation of the agency's standard envelope with some volunteer recruitment material appearing on the cover itself. A sketch of a small child, a logo for the recruitment appeal, or an invitation to "read what's inside and serve your community" might generate immediate interest on the part of readers.

The **business reply envelope (BRE)** is the "return" envelope readers can use to send back their response cards. A BRE is a relatively important piece in the direct mail package. Although many people will fill out a response card and return it in their own envelope, direct mail research has consistently shown that BREs do induce greater response rates. A business reply envelope simply allows the reader to return the response card by dropping the envelope in any mailbox. No postage or addressing is needed. A business reply mail permit can be obtained at low cost from the U.S. Postal Service.

Next comes the question of mailing lists. The most extensive and well-prepared appeal will do little good if it is not directed to the right people.

Every agency has certain "publics" interested in its programs and services. Every agency experiences different expressions of interest and support from different groups of constituents. If lists of the various agency publics are not readily available to the appeal coordinator, he or she should seek them out. They might include former donors, annual donors, staff, former staff, clients, former clients, friends of the agency, members of affiliates, residents of the surrounding community, local civic organizations and neighborhood religious groups. These publics will be the prime recipients of the agency's volunteer appeal, so the appeal coordinator must be sure that

- A list of the "publics" is available and clearly understood;
- Mailing lists exist for each of the publics;
- The lists exist in a form suitable for mailing a volunteer appeal (for instance, the list might be on computer tape or an addressograph file);
- The lists are up-to-date and reliable.

If the constituency of an organization is diverse, a single volunteer appeal—

however well written—may not do the job. Individual appeals directed to particular *segments* of the constituency may be necessary to motivate people to give their time and talents. For instance, an agency might direct one appeal letter to former clients, another appeal letter to "friends of the agency," still another to past volunteers. Each of the appeals would focus on different experiences and images of the agency; each appeal would be written with a special group of people in mind, and directed to the portion of the list containing the names and addresses of the clients, friends, or past volunteers being targeted.

Just as in fund raising, the market for volunteer recruitment may need to be tightly segmented and the appeal's format and content varied for each segment.

Publicizing the Appeal

The best appeal will not be fully effective if it is dropped on prospects cold. An agency preparing an annual volunteer recruitment program would be wise to let people know what's coming—especially if the appeal is a first-time-ever event.

Several publicity methods have proven particularly effective in volunteer groups around the U.S. in generating interest in these recruitment efforts.

First, **pre-appeal letters** can be sent to volunteer prospects or the entire agency constituency. Written by the agency's chief executive, volunteer coordinator or perhaps a board member, the pre-appeal letter tells people that an important and vital message will be coming to them in the next few weeks. It often asks people to be ready to make a commitment of time or talent. It preps people for what is to come.

Second, **general media publicity** is useful for creating background knowledge of the appeal. Media publicity can include articles in the agency's newsletter or house organ, features in the community's newspapers, or if special events can be staged, spots on local radio or television. (Some agencies, for instance, highlight the contributions of volunteers around this time and invite reporters to write stories or do TV spots on them.)

Third, **volunteer recognition efforts** can occur around this time. Some agencies have an annual recognition and awards dinner—thanking people for their past efforts on behalf of the agency and instituting a new appeal for volun-

teers at the same time.

Fourth, if the agency recruits volunteers via other community institutions, **speeches, talks and coffee hours** throughout the community are especially helpful. Most civic, community and social organizations, as well as churches and schools, are usually delighted to host representatives of agencies seeking volunteer help.

Throughout the entire pre-appeal period, the agency's leadership should be talking about the upcoming event. Informal contact and conversation with past volunteers, mention of the appeal in community contacts, and even, use of buttons, bumper stickers, and posters throughout the community all create a genuine awareness of the work of the agency's volunteers.

Thanking Volunteers

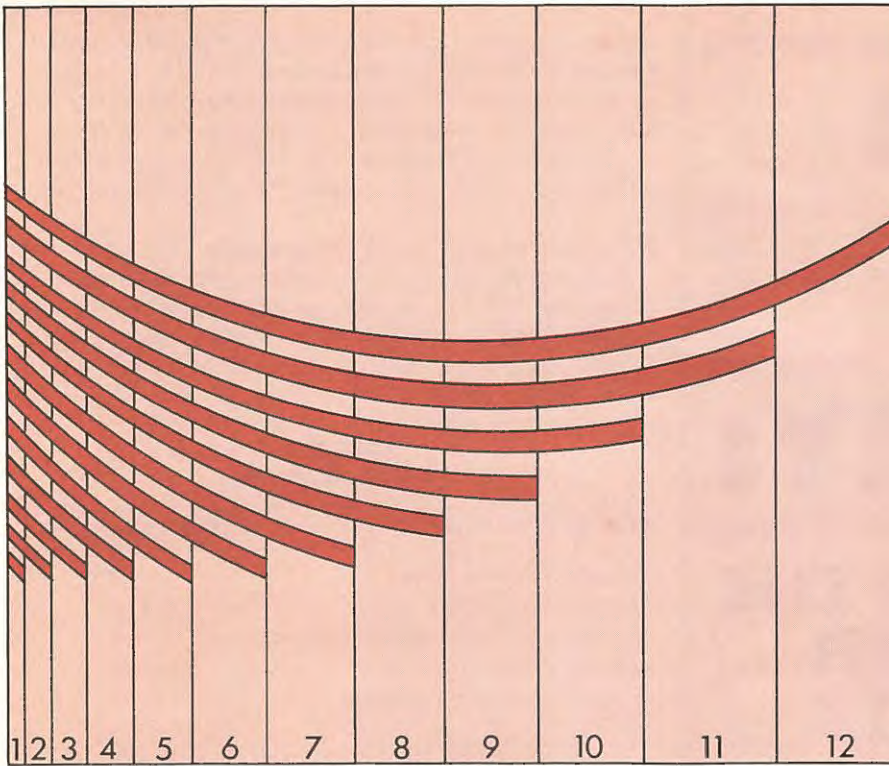
Everyone knows that volunteers need occasional recognition and thanks for their work. Many agency administrators, however, forget that *new* volunteers need immediate thanks for their efforts *to come*. Psychologists often speak of the need for quick and substantial reinforcement for new behaviors; this is true in volunteer administration as well as other areas of human behavior.

A new volunteer, walking into the agency for the first time, will probably be a little apprehensive or uncertain about his or her duties, abilities and value. Once a volunteer has made a commitment to give time to an agency, the agency should do everything in its power to affirm the role of the new member of the agency team. A personal thank-you note from the agency's board president or chief executive, a telephone call from the volunteer coordinator, a tour of the agency—with emphasis on volunteer amenities (coffee pot, lounge area, library)—might be conducted, or, a small gift (a book, membership card, or description of the agency's history) might be presented to the new volunteer.

Yes, volunteers should be thanked from time to time after periods of extensive service. But, new volunteers, embarking on a new journey in their lives, need just as much recognition and care (or maybe more) as "old" volunteers.

Follow-up

Although a volunteer appeal occurs only once a year, volunteers work around the year. Because volunteers are hu-



man—and because agency needs and duties change—volunteers and positions can become mismatched from time to time. The scope of a volunteer job changes, leaving the volunteer alienated and frustrated. Perhaps a volunteer just wants to try something new or cannot volunteer during certain hours because of a change in family routine. All of these factors can involve frustration—and yet, challenge—for the agency with a comprehensive volunteer program.

First, an agency volunteer coordinator would be wise to check up on volunteers from time to time. Every six months wouldn't hurt, and a yearly check-up is almost mandatory. It can consist of an informal conference, a review of performance and problems, and a preview of future volunteer possibilities. It need not be quite as elaborate as a performance appraisal or evaluation, but it should be conducted in depth so that the volunteer's deepest needs and desires should be brought out and used as the basis for appraising the value of the volunteer effort.

Second, the agency should keep a running record of volunteer activities and accomplishments. Volunteers can be encouraged to keep logs on a daily basis or complete monthly progress reports on their work. Perhaps some statistical material—involving contact with clients or office routines—would be

helpful. Statistics and reports help the top managers of the agency keep abreast of volunteer efforts and often point the way to new program directions within the agency.

Third, volunteer activities should be formally recognized from time to time. Volunteer awards and recognition activities already have been mentioned, but ongoing thank-you notes, certificates, newspaper publicity, dinners, coffee hours, family days or just simple expressions of verbal thanks are all important—both to convey the genuine appreciation of the agency's leadership for the untiring efforts of volunteers and to affirm the role of the volunteer.

Fourth, volunteers should be encouraged to recruit other volunteers. Recruitment need not be limited to an annual appeal or other conventional means. The best source for qualified, enthusiastic volunteers is existing volunteers. Every few months the agency's volunteer coordinator might send out a referral slip to every volunteer asking for names of prospective volunteers. Or, a meeting might be scheduled—with lots of advance publicity—for interested persons. Or, perhaps volunteers could be encouraged to bring friends along with them on their "volunteer rounds" to get them acquainted with the agency.

Fifth, volunteers should be invited to appraise their own jobs—and their entire

volunteer program—from time to time. It's not just supervisors and paid staff who should be evaluating the success of a volunteer program. On the contrary, volunteers often bring the best grass-roots insight into client satisfaction, efficiency, cost-effectiveness and program results. Their views should be constantly solicited. Also, volunteers should be asked to suggest changes and improvements in volunteer recruitment, training and supervision methods. Often their views are compellingly objective and should never be ignored.

Finally, the agency should evaluate the success of the entire appeal effort. Volunteer recruitment and administration are far too important in today's human service agency to be left to haphazard planning and follow-up. In fact, before a volunteer appeal is even conducted, agency administrators might sit down to set some realistic goals for the program: How many publicity outlets will be involved in the appeal? How many volunteers will be recruited? How many volunteer hours will be donated to the agency over the coming year? How many new volunteers will "stick with it" for an entire year? How many new clients will be served as a result of the volunteer program?

All of these questions—and probably more in many agencies—are extremely important. These questions should be posed before the appeal is even initiated, and once complete, the questions can be answered with a careful audit of performance and results. Even if the appeal does not meet the standards set by the agency, lessons can be learned. New plans can be made for the next year's appeal. Obstacles can be identified and later overcome. Problems can be parceled out to staff for resolution. Without question, the volunteer appeal should be rigorously scrutinized just as carefully as any other agency operation. Success will come only with careful planning and analysis.

An annual appeal is not a sure-fire way to start or improve a volunteer program. It is but one way to recruit volunteers in a competitive environment. But—it is a proven technique for instilling interest and enthusiasm among potential agency volunteers. With a little creativity and a lot of spirit among agency leaders, the annual appeal can become a tradition very quickly—one that is eagerly awaited for its benefits to volunteers and agency operations alike.