



Case Currents – Council for Advancement and Support of Education
January 1992

FUND - RAISING DEBATE

Who Should Ask for the Gift? Volunteers

By Abbie J. Von Schlegell

When I was associate director of major gifts at Stanford University in the 1970s, senior staff actually discouraged me from soliciting gifts. The university was in the midst of a \$300-million campaign and believed in deep volunteer involvement, so staff worked closely with volunteers who did all the asking at the highest levels. Those volunteers were dedicated and well trained, and the campaign ended up setting a national record for campus fund raising.

This example is just one of many that helps prove the worth of volunteer solicitors. They bring to our campuses enthusiasm, perspective, motivation, and so much more. They are ambassadors to the community, and their vested interest results in more and bigger gifts from themselves and their peers.

Consider that in the billion-dollar campaign Stanford just finished, more than 80 percent of the university's major donors are or were fund-raising volunteers there. What better endorsement for the use of volunteers?

This unique ability to obtain large gifts for our institutions isn't new; in fact, it's grounded in the history of American volunteerism. Through the years, nonprofit organizations have been established by community volunteers who saw a need, raised funds to meet it, and assumed the responsibility necessary to govern the organization. Indeed, this country's volunteer-driven third sector is a model for nations around the world. Today, volunteerism remains essential to the nonprofit community's livelihood and provides a meaningful way for donors to become personally involved in its work.

Volunteerism benefits both the institution and the volunteer. Social scientists have identified a basic human need to be connected, to

'Volunteers are the personal link between campus and community; they offer talents, loyalty, and effort that staff alone simply can't provide.'

counsel in advancement



feel part of a group. It's our job as development officers to make the most of our volunteers' connections with our institutions and with potential donors.

The value of volunteers...

As people become more involved with an organization, they often make larger and more frequent gifts and show greater willingness to ask others to do the same. A committed volunteer not only gives and raises funds but encourages others to become involved. Thus an overly staff-intensive operation sacrifices much more than the knowledge, confidence, and flexibility evident in the most dedicated volunteers.

A volunteer who feels responsible to the campus can contribute as much or more than a staff member. However, the proper training needed to produce these contributions takes time, money, and plenty of effort. So the question remains: Why should we train volunteers when we have professional staff?

The answer lies in the differing nature of the duties volunteers and staff perform. Staff members are certainly essential to the development office and to successful solicitation; few major gifts result from a single volunteer ask.

But regardless of whether they solicit funds directly, volunteers are crucial in identifying and cultivating donors. You would never enter a campaign without identifying a qualified list of prospects; nor should you go into one without recruiting an equally qualified team of volunteers.

The following are just a few of many reasons to include well-trained volunteers in your development program:

- *Volunteers have influence.* They can open doors that few staff members can move. Often, the volunteer is among the more influential and powerful leaders in the community and can speak for an institution with credibility and authority. In addition, because volunteers frequently move in circles beyond the institution, they are able to understand power struggles and political situations in communities and corporations that a staff member never could. A volunteer can use this perspective to smooth the way for a successful solicitation.

What's more, by having a peer make the approach, the institution demonstrates proper respect for the prospective donor. It is far more personal to be asked by a friend, or even someone with a simple common connection, than by a staff representative. It's also evident to the prospect that a volunteer is making the ask solely because he or she cares deeply for the institution and wants others to care about it as well.

Over the years, peer-to-peer solicitation has yielded excellent results. Volunteers can talk with their peers—corporate and community leaders—in a way that's impossible for professional staff.



Only a peer can say, for example, “We have to do this for the institution; now it’s our turn to give something back” What’s more, proficient volunteers can wheel and deal with prospects for large gifts. Polite solicitations from paid staff members often don’t get the same generous results.

Thus, volunteers can approach prospects in an extremely direct way. A quote from a volunteer chair at Princeton University illustrates the effectiveness of this tactic:

“I asked the prominent person for a major gift and he said, ‘I don’t have that kind of money.’ I pulled out proxy statements of the companies in which he owned stock. ‘I’ll be the first to admit you may not want to make a major gift,’ said, ‘but you have to admit you can afford to make one.’ The next week he gave \$500,000 and became a vice chair of the major gifts committee. After he got back from an extended vacation, he apologized for not doing his share of work and gave another \$250,000.”

Only a volunteer could have done what this chairman did: He called the prospect’s bluff.

- *Volunteers make friends.* After seeing and hearing about key volunteers involved with an institution, prospects are more likely to join the effort themselves, both as donors and as volunteers. The physical presence of such key volunteers helps to validate the institution’s worthiness and creates a higher level of expectation for others. After all, volunteers’ only motivation to work for the campus and encourage dedication from others is their devotion to the cause—and examples like that are infectious.

- *Volunteers add enthusiasm.* Because staff members often feel they’re drowning in work, they can easily lose perspective on the campaign’s ultimate mission. Volunteers are more apt to remain enthusiastic about the institution and its goals because they have specific, focused tasks or assignments. They can concentrate all their energies where staff sometimes cannot.

In fact, committed volunteers galvanize the administration and staff. Their energy and passion reminds staff of the purpose behind their mission, which in turn provides motivation.

Of course, volunteers, too, can lose passion for the cause. But with the help of good background materials and training, the staff can help keep them encouraged and committed.

- *Volunteers leverage staff time and effort.* Although volunteers may not realize it, institutions often view them as surrogate staff members. Effective programs make this obvious by placing a job description in the packets each volunteer receives at the onset of his or her term, assigning particular tasks with deadlines, and making clear that ineffective volunteers will be replaced.

The reason, of course, is that most institutions need volunteer help. The use of volunteers as staff has made the era of mega-campaigns possible; without volunteers, no campus would have the

support it needs to conduct such enormous and comprehensive efforts. And this new approach will improve our role as development professionals no matter where we are: The universities conducting these mega-campaigns are actually training volunteers for all of us, not depleting the overall supply.

- *Volunteers complete the team.* Volunteers' help in planning a major gift ask is invaluable; many times, we need them to fill in the last piece of the solicitation strategy. Volunteers form the link between the prospect and the campus, and their unique perspective helps them relate to both.

A fine example of the value of staff-volunteer cooperation is in the ask itself. The staff officer, who has researched the prospect and identified a specific project that interests him or her, assures the prospect that the gift will be compatible with personal and family interests. The volunteer then convinces the donor that the institution needs support and that the major gift will indeed have a significant impact on its well-being.

I've seen this kind of well-prepared team approach result in a prospect's actually offering to make a significant gift before the visitors even got to the ask!

- *Volunteers build for the future.* The most important reason to use volunteers is their long-term commitment to your institution. Volunteers often feel they've invested so much time that their commitment reaches further than even the most dedicated staff member's.

And in many cases they're right. Cultivating a major or "ultimate" gift takes time, but we in the development field can be transient; staff members often stay at an institution just a few years. Can we depend on employees to stay around long enough to carry out the solicitation process? We can depend on volunteers—alumni, trustees, and friends—to remain dedicated to our institutions.

- *Volunteers are free—and priceless, too.* In a time of diminishing resources, it is our responsibility to harness volunteer power for fund raising. Volunteers can both increase the amount of work we accomplish and leverage our connections with prospects. With staff members serving as team leaders, script writers, and coaches, the use of volunteers becomes extremely cost-effective. They allow your campus to apply its scarce resources elsewhere.

But volunteers are much more than cheap labor. Volunteers offer things money can't buy: a vested interest in your campus as well as a passion and a commitment no one else can supply.

Staff members often stay around campus just a few years. But we can depend on volunteers — alumni, trustees, and friends — to remain dedicated to our institutions.



...and how we should support them

For volunteers to bring all of these assets to an institution, it's critical to define their primary responsibilities from the start. Volunteers want and need to know the facts because they know you're depending on them.

Of course, organizing volunteer efforts takes plenty of staff time. So does any worthwhile project. To get the results, both tangible and intangible, that volunteers can provide our institutions, we in development must

- identify and recruit volunteers carefully;
- train, educate, and train some more;
- provide a motivating environment;
- make personal contacts and individualized approaches;
- monitor progress and evaluate regularly; and
- reward those who do good work and remove the ones who don't.

Finally, it's imperative to thank and recognize volunteers in as many ways as possible. Without some type of motivational feedback, volunteers won't feel their job is important. Although staff is the backbone of any institution's development program, volunteers contribute much of the heart and soul. They are the personal link between campus and community; they offer talents, loyalty, and effort that staff alone simply can't provide. Staff members and volunteers are inextricable and, with proper coordination, can achieve remarkable results.

Abbie J. von Schlegell is senior vice president and head of the Chicago office of Barnes & Roche, Inc., a national fund-raising consulting firm. She's previously served as assistant and associate director of development at Stanford University and on the major gifts staff at the University of Chicago. CURRENTS adapted this article from a presentation she gave to the National Society of Fund Raising Executives in March 1990.