

Chapter 1

How Volunteers Can Strengthen Donor Relationships

RAISING LARGE SUMS of money may seem like a formidable task, given the limited resources of many organizations. Unfortunately, this situation is often worsened when staff and volunteers have not had positive fundraising experiences; they may be reluctant, at first, to participate.

But fundraising can be an exciting and positive experience for everyone involved. As you will discover when you implement the affinity fundraising model, your volunteers and staff will experience a new sense of reward and accomplishment that will motivate them to continue their involvement. Volunteerism, if properly cultivated, is the path to your hidden assets—your untapped human and financial resources.

This chapter provides you with an overview of affinity fundraising. You will learn its advantages and disadvantages, compared to more traditional fundraising methods—a comparison that will help you understand why affinity fundraising might be a preferred method for your organization.

To ensure success, it is of primary importance that the right volunteers be chosen for affinity fundraising. We'll show you how to identify individuals who have the skills, motivation, and attitude necessary for success.

But first, you may be wondering why volunteers should be involved in the first place. Isn't fundraising a task for a professional development staff?

Why Involve Volunteers in Fundraising?

Volunteers Give More

Volunteerism is a key factor in charitable giving. Surveys indicate that (1) households with a volunteer give nearly twice the percentage of household income as contributing households in which the respondent does not

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volunteer, and (2) during an economic recession, giving does not decline as long as volunteerism does not decline.¹

Nonprofit organizations have a limited budget with which to hire staff. Think for a moment how much more you could accomplish with volunteers:

- How many more prospects could be visited
- How many more people would hear about your important work in the community
- How many more could contribute
- How many more donors would develop a deeper understanding of how important your mission really is

Involve volunteers and you will multiply your results.
The shortest distance to the donor is through the volunteer.

Volunteers Have More Influence Than Staff

Volunteers can communicate more effectively with prospective donors than staff can. Volunteers work for different reasons from staff; fundraising isn't simply part of their job description. They donate their own time and resources because they believe deeply in the organization. Their conviction and altruism is the candle that ignites the fire.

Volunteers Attract Others Who Are Committed

What you will discover is that greater volunteer involvement will fuel the growth of a larger, more committed pool of donors and organizational stakeholders. By nurturing the interests of your special volunteers, you will be able to secure the support and resources necessary to achieve the goals of your organization.

Who Has Potential for Affinity Fundraising?

Unfortunately, most nonprofit organizations involve volunteers primarily in the programmatic functions of the organization and have little or no experience with volunteers in fundraising efforts. This book will show you how to recruit and train select volunteers who have the required aptitude and skills.

We will not be concerned with volunteers whose involvement is sporadic or occasional. Our purposes are best served by concentrating on the indi-

viduals whose involvement is characterized by longevity and regularity, as well as those who have an emotional or personal involvement with the organization's mission. They have high affinity for the organization. These individuals are likely to participate in activities that are integral to the well-being of the organization. They might be board members, committee chairs, or key professional staff, including staff whose job description does not include fundraising activities. We will refer to this select group as the *core volunteers* (see Figure 1.1).

Characteristics of Core Volunteers

You can identify potential core volunteers because they

- Love the organization and care deeply about its future
- Have several years involvement as a donor, volunteer, or staff member
- May have already involved their families and friends in the organization
- Contribute their time or financial resources freely

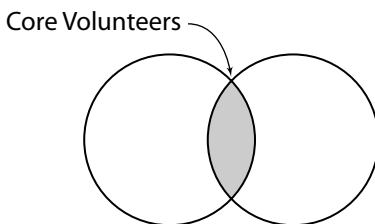
Characteristics of Staff Members Who Become Core Volunteers

You can identify potential staff core volunteers because

- They often volunteer their personal time for special projects.
- The organization is their chief charitable involvement.
- Their morale is good; they feel adequately compensated and appreciated.

FIGURE 1.1

Core Volunteers and the Total Volunteer Population



Why Do Some Volunteers and Staff Become Core Volunteers?

Some 80 percent of core volunteers actually are the best prospects for giving. Thus volunteers often become prospects and eventual donors (see Figure 1.2).

The reverse situation also occurs. A donor may wish to become a member of the core volunteer group because he or she realizes the opportunity and potential of surfacing significant gifts from others. The donor may wish to visit with other prospects. Also, individuals might move into or from various groups (see Figure 1.3).

Core volunteers provide the human resources required for affinity fundraising. They identify, prioritize, and visit with prospective donors (prospects). Because affinity fundraising is volunteer-driven, the volunteers eventually become involved in shaping and implementing the plan for capital, annual, endowment, planned, and special project giving.

FIGURE 1.2

Prospects Among Core Volunteers



FIGURE 1.3

Possible Progressions of Individuals into Groups

Staff → core volunteer → prospect → donor
 Donor → core volunteer
 Core volunteer → prospect → donor
 Prospect → donor → core volunteer
 Prospect → core volunteer → donor

Perhaps you question whether your organization has potential core volunteers or whether you have enough core volunteers to make a difference. In Chapter Four we will help you identify your core volunteers. Subsequent chapters will help you expand that group into a committed group of leaders. You will also learn how to cultivate individuals to higher levels of affinity. But whether you have one or one hundred core volunteers, you can start building your affinity fundraising program today.

Two Approaches to Fundraising: Traditional and Affinity

Here is a way to compare affinity fundraising with the traditional approach:

In the traditional approach to fundraising: identify those with the greatest wealth (who may or may not have connections with the organization); ask directly for contributions.

In affinity fundraising: identify individuals closest to the organization; listen and respond to their most important interests, values, and beliefs; invite their participation in areas that interest them and that validate their personal needs.

Let us discuss the advantages and disadvantages of both approaches.

The Traditional Approach

Many fundraising professionals, ourselves included, have used the traditional direct approach, which involves targeting wealthy people or their friends. When volunteers are involved, they may be asked to target those friends or colleagues and convert them to the nonprofit's agenda. The scenario in which "one hand washes the other" does work well with the affluent. However, the inherent difficulty of this approach is that it falters when used with the general, charitable population. Many individuals may be resistant to or offended by the conversion process. Moreover, many prospective donors have their own priorities regarding charitable giving. It is difficult to convert individuals who have little or no affinity for the nonprofit's work.

For all these reasons, the traditional approach may be discouraging for volunteers who are faced with a dual job: (1) to educate or sell the prospect on the organization and its mission and (2) to ask for a gift. The end result is that volunteers may feel overwhelmed and not complete their calls. In the long term, professionals often need to do the mop-up work, which overburdens a campaign that may already be understaffed.

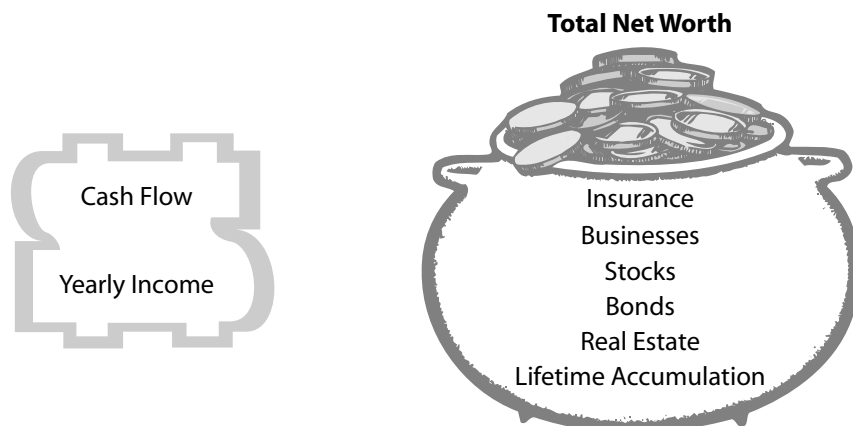
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Staff members, because of their expertise or knowledge, are usually more likely to complete personal calls. However, many organizations lack the staffing required to solicit the number of prospects necessary to complete a campaign. Another consideration may be staff's lack of experience with personal solicitation. For most nonprofit managers, the face-to-face visit is not a large part of their everyday agenda. Consequently, many development personnel are reluctant to make personal calls.

Another shortcoming with the direct approach is that it limits the number of prospects. Overuse of wealth indicators as a priority factor shortchanges the organization. This method overlooks vast numbers of potential donors. It overlooks a significant number of individuals who may not be considered wealthy by traditional attributes of affluence but who are nonetheless capable of making significant gifts. Moreover, it overlooks the potential of volunteers, who often become your best contributors.

Traditional fundraising campaigns focus on an individual's cash flow, or net income, which limits the possibility of securing a prospect's greatest source of charitable dollars—total net worth. This is a much larger pot of potential dollars that includes an individual's total lifetime accumulations. It may include insurance, stocks, bonds, and real estate, as well as current or expected income from individuals and businesses. Affinity fundraising creates opportunities for donors to donate from this larger pot of money, based on their individual needs and interests (see Figure 1.4).

FIGURE 1.4
Cash Flow Versus Net Worth Contributions



Contrast the situation just described with the more traditional method in which donors typically move *up* the pyramid, increasing gift size. Usually donors are not solicited for estate gifts unless they have demonstrated a long history of giving or significant charitable involvement. The comparison of affinity and traditional fundraising is shown in Figure 1.5.

The Affinity Fundraising Approach

In affinity fundraising it is the volunteer's first task to ascertain a prospect's willingness to make estate gifts. Once the prospect makes this important decision, the person can be solicited for other types of giving, as appropriate. In the affinity model, donors typically move *up and down* the pyramid, participating in multiple giving opportunities.

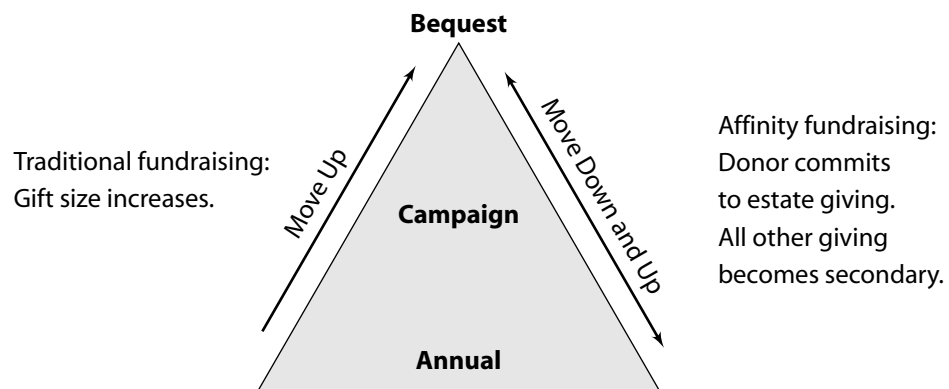
One presumed advantage of the traditional fundraising method is that it is considered a faster method of securing funds. In some cases this is true. It is usually quicker and easier to get smaller gifts. Although in some cases affinity fundraising might require more time, we believe that in the long term, affinity fundraising will secure greater resources for the organization.

Affinity fundraising fits naturally with volunteer leadership. Because volunteers are asked only to visit with individuals who have an affinity for the nonprofit, the job becomes less threatening, less like fundraising, and more like fun. This process minimizes the fear that many volunteer solicitors experience due to lack of experience or to unpleasant fundraising experiences.

With affinity fundraising, the emphasis is not on the "ask" but on listening and building relationships. You will notice this distinction as you

FIGURE 1.5

Fundraising Pyramid: Traditional Versus Affinity Model



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proceed through the following chapters. Volunteers are not trained in fundraising. Fundraising terminology is never used. The phrase “fundraising training” could intimidate volunteers because their prior experiences may have demonstrated that fundraising is an undesirable activity. Instead, volunteers receive “coaching in making personal visits.”

Volunteers will be guided through the process, step by step. They will learn only what they need to know in order to successfully complete each step. Because this process is less overwhelming, volunteers tend to complete their assignments and normally don’t experience the burnout that volunteers experience when they use the direct approach. Experience shows that approximately 80 percent of volunteers who participate in affinity fundraising training meetings complete their calls.

Rather than confine prospects to cash contributions, affinity fundraising opens the door to transfer-of-wealth resources. The scripting techniques of affinity fundraising, learned through practice role plays of the interview format, identify individuals who are predisposed to estate-type giving. Our experience indicates that after individuals make a commitment to planned giving, all other types of giving become inconsequential by comparison. Moreover, in addition to estate-type giving, the donor’s goals, values, interests, and cash flow resources can more easily be aligned to benefit annual, campaign, or special project objectives.

Note

1. *Giving and Volunteering in the U.S.: Findings from Six National Surveys*. INDEPENDENT SECTOR, 1999.