

22.1 - Fundraising Volunteers: Editorial

22.1 - Reflections on Fundraising from the Front Line

22.1 - Journey of Recovery: Serenity Renewal for Families Fundraises for its Future

22.1 - Building and Managing Fundraising Volunteer Teams

22.1 - The Successes and Challenges of School Fundraising

22.1 - Community Fundraising Initiative Run by Volunteers

22.1 - Door-to-Door Canvassing - What Does the Future Hold?

22.1 - Barriers and Motivators - Working with Volunteer Fundraisers

22.1 - The Case for Building a Fundraising Board of Directors

22.1 - Volunteer Staff Partnerships – Creating Genuine Connections to Build Community Together

22.1 - Where Did Everyone Go?

### **Editorial Happy spring!**

As I sat on my front porch, soaking up the first warm rays of sun we have seen in Ottawa this year, my thoughts turned to new beginnings, hope and renewal. So apt, as we launch our new look website and refreshed logo. A wonderful start to our year—we hope you love them as much as we do.

Last summer the editorial team brainstormed ideas for themes for 2014 and the idea to build an issue around fundraising volunteers: the joys and challenges was born. Surprisingly this was a theme that we had not tackled since 1993, but it is one that certainly resonated with our contributors.

A common thread emerged—the changing fundraising landscape, increased competition and diminished support from traditional revenue streams. But we hope you will be inspired by the creativity employed to address these challenges by both nonprofits and their volunteer fundraising teams.

Marlene Beitz sets the tone for the issue by discussing "the good old days" and what has changed over the last 40 years. Brian Tardif makes the case for building a fundraising board of directors and contributors Faiza Kanji and Bryan Dawson show us how to create genuine connections between staff and volunteers. John Cox, Laura Dimic and Karen Graszat give us tips on how to build and manage volunteer fundraising teams for large and small organizations.

We have also looked at the stresses on small organizations (Ann Carmichael, Lauralee Comeau and Carrie-Ann Goodfellow) and the challenges of running a large door-to-door campaign (Ruth Vant and Crystal Cobb).

I think you will agree with me that the themes of hope and renewal resonate in these articles from our diverse group of contributors from around the country. We believe you will be inspired and motivated as you go about building and managing your volunteer teams to grow the much needed revenues for your organizations.

***Maria Redpath, Editorial Team***

### **Reflections on Fundraising from the Front Line**

by Carrie-Ann Goodfellow, Toronto, ON

I, like so many others before me, thought fundraising was easy. You ask for money, you get given money, job done. I *especially* thought it would be easy when you throw in a cause that is playing a vital role in the community. Or, at least, so I thought...

I have been a fundraiser for six years (this almost sounds like I should be sitting in a circle confessing with other fundraisers, right?). I think I am a fairly typical fundraiser. I fell into the job, fell in love with it, and have not looked back. Sure, I have noticed some early onset greyness appearing over those six years, but the end result is worth the stress. I still remember the first time someone agreed to give me their money—their actual money—for the cause I was fundraising for in Vancouver. They thought about it, agreed and gave me a cheque then and there. I almost grabbed it from them and ran out the door before they could change their mind. Over the years, since that giddy moment, I have experienced many highs and lows, as is par for the course with this job.

Fundraisers know that you will experience more noes than yeses (and if you get more of the latter, you will need to start bottling and selling whatever you have). I tend to joke that after my first ten noes I stopped taking them personally. It is difficult to fight to raise funds for a cause that is so critical, when the community at large offers little support, as they assume you must be fully funded by the Government. We are fortunate at Distress Centres to be partnered with both United Way Toronto and the City of Toronto, who between themselves fund approximately one third of our annual operating costs. Simple math dictates that we then require an additional two thirds to make our annual targets.

When I took on the role of Resource Development Manager at Distress Centres just under one year ago, I thought to myself, this would be simple. We are saving lives! Every call we answer through our 408-HELP Line helps to ensure that another of our most vulnerable members of society finds the strength and resiliency to keep going, to make it though the day, to live. We are the emotional safety net for our community, and the only 24/7-crisis support line in the city. Our callers all come from diverse backgrounds. Chances are, if you live in the Toronto area, you are six degrees of separation from someone who has used our line, participated in one of our programs or volunteers their time with us. So why is it so hard to secure that additional two thirds of funding?

One reason is the sheer number of other charities. There are more than 170,000 charities in Canada. As of 2003, there were 2,000 active grant-making foundations registered in Canada. To simplify this, that is

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85 charities for every foundation. We are all competing for the same dollars and the pot is only getting smaller. Last year, we submitted more than 150 applications for funding to family foundations. Many of these were foundations that may not have been aware of the work we do prior to receiving the application. Many of these foundations are run by trusts set up by financial institutions, which is not ideal for building relationships. As all fundraisers know, solid relationships are key to being heard and for receiving game changing funding. Corporations have always proven difficult nuts to crack, and more are now focusing on creating partnerships that benefit their business, i.e., exposure. Agencies like ours do not have large grandstanding events or even premises to which we can invite companies, that corporations have for publicity— that is a key challenge.

But it is not all doom and gloom. Our Board of Directors is playing a role in building relationships with potential prospects using their personal contacts. This has already resulted in a coup of major gifts being donated to the agency, one of which has been pledged over a multi-year period. Our Board and executive director are also playing a key role in our major gift campaign, which we will be launching later this year. This will be the first time Distress Centres has launched such a campaign, and hopes are high for a good result. We have good reason to be optimistic. Distress Centres has a 59% retention rate for private donors, 18% above the national average. Our donors really care about what we do and we have done a fantastic job at communicating our results to them. We have a robust fundraising plan in place for 2014 that will see us target a smaller number of foundation and corporate prospects and work on building closer relationships with them. We will be making use of our current donors and contacts to help garner personal connections to future prospects, building upon existing relationships to get our message across.

We are excited about the year ahead. We have 47 years of experience on our side, a passionate and committed team and a loyal donor base waiting to be mobilized. Sure, you could just focus on the challenges, but I prefer to look at the opportunities. And hey, would life not be dull without the challenges anyway?

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*Carrie-Ann Goodfellow has been a fundraiser for 6 years in both Vancouver and Toronto and currently works for Distress Centres, Canada's oldest and largest crisis helpline agency. She has more than 15 years' experience of working in the private and public sector in the United Kingdom and Canada.*

### **Journey of Recovery: Serenity Renewal for Families Fundraises for its Future**

by Ann Carmichael, Ottawa, ON

Serenity Renewal for Families provides education and counselling to persons affected by addiction, addictive behaviours and mental health issues. We support people from all walks of life and the person who reaches out for help may be an addicted person, but is often a family member. It could be a parent, child, partner, grandparent or friend who makes that call. Each year, we see over 1,000 clients in more than 5,000 face-to-face encounters and take more than 17,000 phone calls. We may make referrals for treatment, follow through on aftercare, provide counselling or give guidance for making healthier

choices for the rest of their lives. We bring hope and healing to the hopeless and teach them that change is possible.

Very often those who seek our services are unable to pay. Many live with disability or are unemployed and depend on some form of social assistance; others are struggling with the financial challenges of raising a family or living on a low or fixed income; still others are coming to us in chaos and have difficulty managing their money. Our policy for 30 years has been to turn no one away for financial reasons. Our actions have been guided by our overarching principle of serving those in need in our community with dignity and respect.

Fundraising needs for Serenity Renewal for Families were manageable for the first 25 years. We received half our budget from a private donor, a religious order of sisters called the Congregation of Notre Dame (CND). The sisters provided not only funds but helped out in administrative and day-to-day activities. The other half of our budget was raised through fees, donations, fundraising events and grants. For years, \$400,000 served our needs: what we received, we spent on programs, rent and salaries and very little was needed in reserve.

All that changed in December 2009 when we received our last cheque from the CND. We had done our best to prepare for this eventuality, but we were ill-equipped for fundraising on a big scale. The global economic downturn also made it impossible to replace our core funding through donations, grants and government funding. An inspiration and measure of our staff's dedication was that they worked for four months without salary to keep the doors open and keep up their tradition of listening and teaching that is so much in demand. A measure of our strength was the grassroots support we found in the more than 100,000 people who came through our doors over the years.

A decisive step towards defining a business model for survival took place early in 2009 when we engaged the services of Ketchum Canada Inc. (KCI), philanthropy consultants, to conduct a feasibility study. Our question to them was: "Should we move heaven and earth to keep Serenity Renewal for Families alive or should we pack up our tent and move on?" KCI surveyed our clients, community agencies, hospitals, treatment centres and donors. Their results indicated that we were considered "a hidden gem" and that closing our doors would be "a disaster" for not only our clients, but also for organizations that refer clients for help. Braced by this resounding vote of confidence we undertook to implement KCI's plan for survival.

In the busy years since, we relocated to much smaller premises, altered our governance structure and devised a communications plan to reach out to community donors, agencies and government. We doubled our efforts in fundraising events but all the while sought to build community support and to engage our 150 volunteers. We raised our fees for the first time in 30 years and called upon those who could afford to pay, to help those who could not. We sought project grants to help defray our ongoing operating costs at the same time as we renewed and refreshed our programs. We made inroads in the corporate world, starting small and seeking sponsorships for events. We communicated our fundraising achievements through electronic newsletters and quarterly events, website and social media. Once more, we drew on generous volunteers to help us through the learning curve as we adapted to media

Showcasing Canadian talent in the leadership of volunteers that was new to us. We set up online payment processes to facilitate registration in both our programs and events. We introduced monthly giving options to leverage donations and improve our cash flow and streamlined our income tax receipt process to accommodate the increase in donations. In 2013, we launched a 30th anniversary campaign to celebrate where we came from and why we are here. The campaign culminated in our 30<sup>th</sup> anniversary dinner in November 2013. It was a great party!

Building community support both at client and professional levels was critical to our success so far. We are not out of the woods yet but with the support of staff, board, clients, donors, sponsors, grantors and all the people who responded to our call for help, we are looking at a future of promise. In our work, we refer often to “the journey of recovery”. I can only say this journey has been quite the ride!

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*Ann Carmichael has been the Executive Director of Serenity Renewal for Families since October 2011. Previously, she served as a volunteer board member in various capacities, including Board Chair and Treasurer. Ms. Carmichael’s background in human resources consulting and entrepreneurship has been an asset to Serenity Renewal for Families in its transition to a fundraising business model.*

### **Building and Managing Fundraising Volunteer Teams**

by John Cox, Toronto, ON

As Senior Volunteer Engagement Coordinator for the Canadian Cancer Society in Toronto I manage up to 200 returning or newly recruited volunteers, for 10 to 15 fundraising events annually. Depending on the event, the size of the planning committee can vary from a handful of volunteers to 30 members.

Over the years, I have come to believe that two key areas for building teams and managing fundraising volunteers are recruiting the right volunteer for the right role, and supporting and engaging the volunteer.

The following suggestions can help create an effective fundraising volunteer team.

#### **Recruiting and selecting fundraising volunteers**

- Months before each fundraising event, a manager of volunteers must start recruiting and building the volunteer planning committee. Each committee volunteer has a specific role or task based on their individual skill set and expertise.
- When developing a fundraising team one thing to keep in mind is that when someone is devoted to a cause that they believe in they will do everything they can to help out. This commitment is something I look for when selecting volunteers.
- Ensure a proper screening process is in place. Depending on the role requirements, the screening steps require a volunteer application form, an interview, reference checks and security background checks.



- Selecting the right volunteer for the right position helps to create an enjoyable volunteer experience and a positive image for your organization. The volunteer will feel valued and may continue volunteering year after year. They will also share their positive experience with others if they feel they are making a difference.
- If a volunteer is in a role that is not the right fit they may feel that they are wasting their time and energy. They may leave prematurely.
- The volunteer is more likely to join your team if they have a clear understanding of what your event is all about and the volunteer opportunities that are available. Give your volunteer options. Before you approach a potential volunteer plan ahead and rehearse what you would like to say. Explain that you have a volunteer opportunity for them that matches their skills and expertise. Let the volunteer know that they will be part of something special and that their hard work will allow them to support a good cause and give back to the community; it is important that volunteers know where the funds raised will go.
- There are different kinds of roles required on every fundraising team. Some people are more comfortable than others asking for money. There are other roles for those who are not.
- If a volunteer indicates they can establish new relationships easily, they are organized and goal orientated and they are not afraid to ask for money, then fundraising is the perfect volunteer opportunity for them! For these people, asking for money is like a game. They enjoy it so much that they pass this enthusiasm on to the donor. These volunteers play a vital role on an event planning committee and can either make or break your event, so selecting the right volunteer for the right position is essential.
- Provide the fundraising volunteer with a script, best practices around fundraising and appropriate training. This will ensure their fundraising approach is aligned with the tone and policies of the organization.

### **Supporting and engaging fundraising volunteers**

- Keep them motivated and energized. They will have many questions, especially new recruits. Answer any questions they may have as quickly as possible.
- Have regular committee meetings and ask your volunteers for their input in the decision-making process. This will keep them engaged and will also increase their commitment level.
- Be a leader. The best way to do this is to be effective, well organized and energetic. Let your enthusiasm show at all times, and be there for support.
- Provide the volunteer with as many tools, documents and guidebooks as are available. If your volunteer is new, team them up with an experienced volunteer.
- Continuously ask for their involvement from the beginning planning stages through to the end of your event. Strategize together on how to reach your fundraising goal, so you will have a greater success in achieving it.
- After the event, debrief and discuss what worked and what did not.

By working collaboratively, volunteers will feel valued, empowered and part of a team. Your event will succeed and your volunteer will have a positive volunteer experience.

*John Cox started managing volunteers in 2005 with Big Brothers and Big Sisters of Toronto. He is currently the Senior Volunteer Engagement Coordinator with the Canadian Cancer Society, Toronto.*

### **The Successes and Challenges of School Fundraising**

By Lauralee Comeau, Ottawa, ON

Fundraising ... the mere mention of this word invokes fear in individuals, creating a reluctance to participate. I will be the first to say, “Yes, there is an abundant amount of work involved in any fundraiser— on the other hand there is a sense of great accomplishment and satisfaction that goes along with a successful event.”

Based on my involvement and experience from numerous schools over the last 14 years, as well as working for many years for a registered charity —fundraising is a vital and critical component to any organization and in some cases, a required tool to achieve goals.

From a school perspective, it does not matter whether it is an elementary or secondary school, big or small, old or new, high- or low-income families, rural or urban—fundraising is still a big part and extremely critical component of the school. We have all witnessed the increasingly limited amount of funds available, not just for a few luxuries or desired items, but for basics such as a new play structure, or in the case of a newly constructed school, helping a library with limited resources to add to its collection. Fundraising has become the main avenue to accomplish many of the aforementioned goals.

Fundraising goals, objectives, above criteria and procedures have to be carefully examined and planned. What may have proven successful in an elementary school (e.g., lunch programs with milk, subs, pita sandwiches) would not be successful in a secondary setting that already has a cafeteria service in place.

There are numerous factors that are essential to consider prior to making any decisions on what fundraisers to introduce.

Questions to ask will include some or all of these:

- What is the fundraiser for, and does the event fit in with your goals?
- What financial outlays of funds are needed to proceed?
- Is there any other school nearby engaging in a similar fundraiser?
- Is the lead organizer experienced?
- Is there support from staff and administration?
- Is there liability insurance in place to protect volunteers?
- How can students be involved without pushback from parents?
- What are the demographics of the school?

Many other details are important requirements for the planning of a fundraising event.



These include the following:

- Does the event require an assembly to launch?
- How long is the event: only one day, spans 2-3 weeks, or continues throughout the year?
- How do we publish it?
- How many volunteers are required; what is the time commitment?
- What time of year is best to launch the fundraiser? Is it weather dependent—if so, what is the alternative plan? Any scheduling flexibility?
- Is this a one-time fundraiser or an annual event? Does the event have room to grow or is it time to launch a pilot?

It is important to consider the above questions prior to making any final and firm decisions. Speaking to other schools and learning about their experiences—successes and failures is an additional asset. The depth of analysis is a direct correlation to a successful fit among volunteers, students, parents, staff and school. The more cooperation from all these participating players makes the event more successful. In essence, do your homework prior to making any decisions. If it is unsuccessful, will it cause a significant financial dilemma, as funds are needed to purchase products to sell? Are there funds in place if it fails to meet goals?

The majority of times, events are highly successful that either meet or rise above your targeted goal. I recommend a debriefing after the event to evaluate factors that worked or need to be amended for the following year. If the event was not a great fit and did not assist in accomplishing your goal, a debriefing is still highly recommended to identify what worked and what did not. In such cases, it should still be considered a learning experience, to be applied to subsequent fundraising events.

Fundamentally, as a volunteer, you are viewed as a valued and appreciated individual who has taken time from your very busy schedule, not for any monetary remuneration but solely to make a difference and better the community. As I have heard many times over the years, a school itself is just a building. What makes it special is the spirit and dedication from within its four walls.

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*Lauralee Comeau is the Co-Chair of Longfields-Davidson Heights Secondary School Council, and previous Vice-Chair of Adrienne Clarkson Elementary School in Ottawa. She has spent the past 12 years volunteering with the Ottawa-Carleton District School Board. She was past manager of Programs and Blood Pressure Captain for the Eastern Ontario branch of the Kidney Foundation of Canada, and RN (Community, Palliative, Pediatric and Certified Footcare). Lauralee lives in Nepean, ON.*





## Community Fundraising Initiative Run by Volunteers

by Karen Graszat, Ottawa, ON

“There are two ways of spreading light—to be a candle or the mirror that reflects it.”

Judith Wharton

To say that volunteers are the bread and butter of any nonprofit organization would, be an understatement. Without the dedication, support, enthusiasm and hard work of all our volunteers, Breast Cancer Action (BCA) would cease to exist. Volunteers are involved in all facets of our organization and I would like to shine the light on two of our best and brightest community champions. Through hard work and dedication they have grown a small event into a major fundraiser.

The story I want to share is the one of Breast Friends FUNdraiser, an event borne out of one woman’s helplessness as she watched a friend battling breast cancer. Enter Allison Prest, a popular fitness instructor who decided to launch an event to collect money for BCA and promote awareness of breast cancer first to her participants and subsequently to others in the fitness community.

With the support of the recreation complex and fellow fitness instructor, Anita Findlay, Allison leveraged her students, community and connections and on a Saturday afternoon with 100 participants realized her goal of \$1,000.

In 2011, Allison, determined to grow the event and raise more funds, made some calculated changes. She moved the event to Friday night, added a half time show, invited vendors to participate, introduced a silent auction and raised over \$5,000.

Building on success, in 2012, Allison encouraged participants to raise money through pledges and added a spin-a-thon. They raised \$12,000!

Moving forward to 2013, they added 3-hours of yoga, a special draw of a signed hockey jersey and an in-store fundraiser with a local merchant. Although there were fewer participants than the previous year, they raised \$13,000. That is over \$30,000 since inception!

Aside from the obvious passion and dedication shared by Allison and Anita, what contributed to the success of these events? One of the greatest assets to any event is the generosity of the community. It has been my personal experience that small towns support big. This is proven year after year, with volunteers, vendor tables, food and beverage donations, items for the silent auction, entertainment and like-minded fitness instructors. In addition to the municipality generously donates the space at the recreation complex.

Generally speaking, people volunteer because they believe in the cause and usually have a personal connection; in this case, to someone who has or had breast cancer. They bring something to an event that is unique to volunteers. They take ownership of the outcome as they care about the event rather

Showcasing Canadian talent in the leadership of volunteers than seeing it as an assigned task. Volunteers are there because they want to be: they support the event and they believe wholeheartedly in the cause.

The best and most effective way to work with volunteers is to play to their strengths, delegate specific tasks, be organized, check in with them, but do not micromanage. Keep them informed and engaged; communicate, give them instructions as needed and ensure they feel part of the team.

Volunteers are an amazing group of people with different interests, talents and connectedness. When asked what the secret is to retention of volunteers the answer is multi-faceted. Recognize, acknowledge, inspire and appreciate each individual's contribution. Motivation comes from knowing they make a difference, in some way, big or small, and that their participation has contributed to a successful event.

The biggest, simplest advice in volunteer management is to check in with them during the event, ensure they are busy and happy and most of all thank everyone!

When all is said and done, to what do we attribute the success of Breast Friends FUNdraiser? First and foremost is the passion and dedication of Allison Prest combined with the leadership and support of Anita Findlay. With the assistance of all their committee members, fellow fitness instructors, pledges, participants and event workers, they have raised over \$30,000 for Breast Cancer Action. What does this diverse group of people have in common? They are all volunteers!

"It is easy to make a buck. It's a lot tougher to make a difference."

Tom Brokaw

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*Karen Graszat, Executive Director of Breast Cancer Action. Working for Breast Cancer Action has given her an opportunity to meet so many amazing women who have fought the battle and won. As a member of BCA, she is in a position to assist, in some small way, to make a difference in their lives.*

### **Door-to-door Canvassing – What Does the Future Hold?**

by Ruth Vant, Ottawa, ON in conversation with Crystal Cobb, Charlotte Town, PEI

Door-to-door canvassing is just one form of fundraising. It is one that has been around for a long time and, in some organizations, has grown to be a large part of their financial support. The most successful campaigns have long relied upon the support of thousands of volunteers who, for the most part, have a connection with the organization.

One of those successful campaigns is Heart Month, which was originated by the Heart and Stroke Foundation of Canada (HSF) in select Ontario cities in 1958. In their first year, they exceeded their door-to-door campaign goal of \$250,000 by almost 30%. In 1962, canvassing expanded to include more cities across Ontario. Today, the Heart Month campaign is well established nationally, and is HSF's largest and

best-known campaign. Each year, during the month of February, approximately 80,000 HSF volunteers across Canada reach out personally by canvassing door-to-door in their own neighbourhoods, to help raise money to support research initiatives and to raise awareness of heart disease and stroke.

Eighty thousand volunteers—that is a lot of volunteer resource management! To help understand the basic process, I spoke with Crystal Cobb, Community Fund Development Coordinator for HSF, Prince Edward Island. She is responsible for all aspects of the PEI Heart Month campaign, which encompasses over 750 volunteers.

Recruitment for the February campaign begins in the summer. Crystal starts by contacting returning volunteers, ensuring she makes personal connections where possible to continue to build strong relationships with them. The cold calls begin in September. She asks volunteers to contact potential new recruits to try to fill the number of positions needed. This process often continues into mid-December, and even into January if required.

Next is orientation and training. Crystal organizes three Heart Rallies for the second week of January, one in each of east, central and west PEI. They consist of an information night, orientation and distribution of materials. Of course, not everyone is able to attend the Heart Rally in their area, and so Crystal has a couple of back-up plans. Volunteers may, if they choose, drop into her office and pick up their canvasser's kit. At this time, she would provide them with a short orientation session. Alternately, Crystal would deliver the kit to their home and provide instructions at that time, either in person at the door, or in writing, left with their kit in their mailbox. And, of course, all the information that volunteers require is also available for them online.

This is the time when the phone lines can be tied up as Crystal is inundated with questions, mostly from new recruits. Out of the 750 volunteers, approximately 250 work under the supervision of a volunteer captain, who takes on some of the training and most of the questions. The remaining 500 independent canvassers rely directly on Crystal for support.

I asked Crystal about the percentage of people who return as volunteers each year, and was astounded to learn that this number is 86%. I wondered what she was doing to encourage retention. She said she used to hold a thank-you luncheon, but the volunteers felt it was a waste of money – even though the costs were minimal, since most things were donated, the perception of waste remained. So, now she sends personalized thank-you notes to each volunteer. This way, everyone is thanked equally – not just those who were able to attend the luncheon.

Crystal went on to say that returning canvassers are a major reason for the success of the campaign. It takes 2.6 new people to replace someone who is returning year after year. Most importantly, returning volunteers usually have a strong connection to the cause, canvass in their own neighbourhoods and build on the relationships they have fostered. This results in a high number of donors and overall financial success.

The average PEI canvasser is female, married, middle-aged, has a university degree and is recently retired or working fulltime. These volunteers differ from others because they are comfortable asking

Showcasing Canadian talent in the leadership of volunteers their neighbours for money and almost always have a relative or close friend who has suffered through heart disease or stroke. They are also very friendly—after all, we are talking about Prince Edward Island!

It becomes obvious that this kind of campaign is not going to be successful if the volunteer positions are just filled with “warm bodies”. The success will depend on ensuring the right people are identified – people who believe strongly in the organization, are gregarious and do not mind asking others for donations.

Crystal recognizes that what works today may not work in five years. The population is aging, and there are very few young people stepping up to take on the roles of long-time volunteers who will be unable to continue helping with the door-to-door campaign. Other challenges she faces in recruiting sufficient volunteers include the long distances for canvassers to travel in rural areas or on the outskirts of town, and our Canadian weather. Lots of potential for snowstorms, cold, ice and slipping keep some people from offering their services.

When I asked Crystal if she feels this form of fundraising is still viable, she responded with a definitive “yes”. It is very successful in PEI. People enjoy it and keep coming back year after year. She is unsure what may happen in a few years, as many of her volunteers get older, and she is always looking for younger people to take over some of those positions.

Is the face of door-to-door canvassing going to change? Will the challenges that Crystal identified persist and perhaps worsen? There are also many other obstacles that may make this well-established form of fundraising difficult to continue. For example, there has been an increase in online donations, an upsurge of paid canvassers and telemarketers, the emergence of sound-alike charities which cut into the donations of legitimate charities and an increasing reluctance of donors to give money at the door. Organizations such as HSF, which rely on their door-to-door fundraising campaigns for a major portion of their financial support, may need to take a closer look at what the future may hold for them.

One thing is certain—there needs to be a lot of dedication for door-to-door canvassing to be successful. Not only on the part of the volunteers, but also on the part of their staff support. Perhaps that is why the Heart Month campaign in PEI is doing so well.

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*Ruth Vant is a member of the CJVRM Editorial Team. She has been a volunteer in many different roles over her entire life, including being both a door-to-door canvasser and a captain for the Heart Month campaign in Ottawa when her children were young.*

*Crystal Cobb is the Community Fund Development Coordinator for the Heart and Stroke Foundation in Prince Edward Island. She has been with the Foundation for two-and-a-half years working with volunteers across the island. She enjoys making personal connections with volunteers and helping those who have been affected by heart disease and stroke.*

**Barriers and Motivators - Working with Volunteer Fundraisers**

by Laura Dimic, Ottawa, ON

Cuso International is an international development organization that works to reduce poverty and inequality through the efforts of skilled volunteers. Each year, we place volunteers from North and South America in developing countries in Africa, Asia, the Caribbean and Latin America. Volunteers collaborate with local partners on health, education, environment, social justice and livelihood projects, sharing knowledge and experience to create sustainable change.

Each volunteer is required to go through an assessment process as well as a five-day intensive training course. Volunteers are also expected to fundraise on behalf of the organization. They are asked to reach out their personal networks and community in order to meet a \$2000 fundraising target.

Once the volunteer is accepted into the pool of candidates through the assessment process, the organization offers support for fundraising. Cuso International has a full-time staff member that trains and supports volunteers through every step of the fundraising journey. Volunteers are required to attend a one-hour webinar that discusses motivations of donors, fundraising best practices and fundraising success stories from past volunteers. After completing the webinar, each volunteer will have a one-on-one meeting with the Volunteer Fundraising Coordinator to discuss ideas, concerns, potential barriers and activities of interest.

**The Challenge: Overcoming resistance to fundraising**

Attitude is a key aspect when it comes to volunteer fundraising. If a volunteer understands that they need to commit time and mind to achieving targets they will be successful and may even surpass the \$2000 target. The Volunteer Fundraising Coordinator needs to identify volunteers who may have objections, concerns and fears about fundraising. These are the volunteers who need extra attention and support.

Every volunteer is unique, and each will come with their own "baggage" about raising funds, asking people for money and giving to charity. Common fears are: "I can't ask people for money"; "I am not a salesman"; "I am not a good fundraiser" or "My network is poor".

**How to change volunteer attitudes to work for rather than against them**

What has been extremely successful is helping volunteers to understand basic fundraising practices such as

- how to tell a good story that emotionally moves people,
- being aware of donor motivations and
- how different fundraising mediums engage different audiences.

Standard messaging allows volunteers to feel confident when asking people to donate and to explain to donors where the funds are going.

Informing the volunteer about specific incentives for their donors to give to Cuso International is also very important to help encourage donations. As an example, for every \$1 donated to Cuso International, the Department of Foreign Affairs, Trade and Development Canada (DFATD) will leverage the dollar nine times, giving their dollar the power of \$10. Volunteers can have all the tools but if they have reservations or a negative attitude, results will not happen. What has worked well is actually discussing these concerns as a group and openly addressing the fears. Asking volunteers to consider the benefit of the "ask" (more volunteers recruited to help people living in poverty) versus the fear of the "ask" (people choose not to give) has been helpful. It is also important to remind people that they cannot usually predict why someone may or may not donate. People may give because the volunteer is a friend or family member, because they are emotionally moved, for the tax receipt or because it is part of their value system.

### **Simple tools to get started**

We provide volunteers with a few cookie cutter fundraising tools to help get started. However, before volunteers can use these tools well, they need to be able to share their story effectively.

Seth Godin, a marketing and blogging guru, says, "...every time someone donates to a good cause, they're buying a story, a story that's worth more than the amount they donated... the fundraiser, then, isn't taking, [they are] giving. [They are] giving someone the chance to buy a story that's worth far more than it costs. If people aren't donating to your cause, it's because you're not telling a story, or telling the wrong story to the wrong people (in the wrong way). Non-profits make change, and the way they do this is by letting us tell ourselves stories that nurture our best selves."

Cuso offers help setting up and maintaining blogs for all volunteers to ensure that they can share their story with a large number of people. Cuso International also offers online fundraising pages to every volunteer. This allows them to personalize their page with photos, videos and a message to their supporters. The page can be shared by email, social media and more. It is an easy and quick way to share their goal with others and facilitate online donations. It allows them to monitor their progress towards the goal, see who has donated to them, send e-thank you cards and ensure their donors receive tax receipts.

Cuso International also has a comprehensive list of offline fundraising resources and opportunities depending on where a volunteer's interests lie. This array of tools is reviewed on a regular basis to make them more effective and attractive for volunteers.

Most importantly, volunteers are constantly reminded that when they hit roadblocks there is a full-time staff member to help them overcome them. Volunteers are often pleasantly surprised by how well they do with their fundraising and are touched by the friends, family and colleagues who choose to support their important work overseas.

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*Laura Dimic is the Coordinator of Volunteer Fundraising and Special Events at Cuso International. Laura has a specialization in Communications with a minor in Psychology from the University of Ottawa, as well as an Event Management certificate from Algonquin College. Laura has a vast experience having worked for the Canadian government, private sector and multiple nonprofit organizations. She also volunteers in her spare time.*

### **The Case for Building a Fundraising Board of Directors**

by Brian Tardif, Ottawa, ON

These days, much is written and spoken about the changes, evolution and challenges of the voluntary sector in Canada. Government funding is decreasing, competition for existing resources, including donor and sponsorship dollars is increasing and the need to fundraise in organizations is growing. Added to this are the changing nature of philanthropy reflected in the emerging donor directed approach and the increasing focus on demonstrated impact of programs and projects, legislative changes requiring greater transparency and accountability and the changing landscape with respect to sponsorship expectations. One might wonder why anyone would want to volunteer their time to sit on a board of directors.

Yet, we know that many people do sit on boards and most often for the right reasons. They share the values the organization espouses, they like the mission, they view its work as a good example and they want to provide assistance, help spread the word, gain experience, develop skills, etc. Nevertheless, with all these good motivations and intentions, board members are sometimes ill prepared for the governance and fiduciary responsibilities associated with their role. They can lack understanding of the model of governance under which the board operates and the implications this model has for their level of commitment and engagement. A fundraising board is different from other board models such as working, policy or governance boards. While there are some shared responsibilities among these models, there are clear distinctions and requirements.

Building a fundraising board is more critical in the current climate than ever before—and this requires that everyone understands its specific responsibilities and expectations. A fundraising board is one where every board member recognizes the importance of being a financial donor to the organization. Their donation can be whatever they feel they can relatively afford. It is no longer acceptable to say I give my time therefore I do not need to contribute financially. Funds and other donors interpret 100% financial contribution from the whole board as a message of confidence that this organization is worthy of and can steward my contribution. A fundraising board recruits members who clearly understand this expectation.

Fundraising board members need to understand their role in helping to raise funds and the many ways this is possible. Some of the responsibilities associated with the role are being organizational ambassadors, opening doors, using personal and professional networks, participating in solicitation campaigns, attending and supporting special events or actively engaging in the implementation of the organization's fundraising plan..



Fundraising boards understand why raising money is important and have board meetings that reflect this. Meeting agendas are largely devoted to building the fundraising capacity of the organization. Board members know how money is raised and understand the importance of having a balanced approach, so there is not too great a reliance on one strategy. They are exploring the ways in which those who benefit from the mission of the organization can participate in raising money, whether it is through testimonials, helping with solicitations and many other ways.

Fundraising boards know about who gives money to the organization, individual donors, corporate supporters as well as government funds and foundations. They have a full understanding of where the revenues come from. Board members understand and are actively engaged in cultivating relationships with donors at all levels and the importance of helping those who contribute in understanding the organization's mission and values. They are engaged in soliciting or making "the ask" and in stewarding funds received. Members recognize their development needs and seek and participate in training that will further their individual skills and capacity to support the fundraising plan.

In building or transitioning to a fundraising board, it is important to recognize that there are people who will naturally "get it" and engage when given the tools. There will be others who "kind of get it" and will follow those who do once they are engaged and experienced. There will be those who "don't get it", are not comfortable with it and not interested. A fundraising board will continually be strategizing on how to move from the status quo to increase fundraising capacity, i.e., how to help board members understand their resistance to engaging in fundraising and ways to overcome this resistance, exploring the question: Why would someone want to give you money if your board members do not?

Building a fundraising board requires time and investment. It may be important to engage experts other than the Chief Executive Officer (CEO) or Executive Director. Consider creating a range of fundraising opportunities in which board members can become engaged. The CEO and staff may need to do some "hand holding" in helping to make the transition with an existing board or new board members but the results can lead to a stronger organization with more sustainable programs into the future.

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*Brian J. Tardif has been the Executive Director of Citizen Advocacy Ottawa since 1985 and has worked in the voluntary nonprofit sector for over 35 years. In a very part-time consulting role he has provided organizational development, facilitation and training to numerous organizations at the local, provincial, national and international level.*

### **Volunteer Staff Partnerships – Creating Genuine Connections to Build Community Together**

by Faiza Kanji and Bryan Dawson, Toronto, ON

The YMCA of Greater Toronto is a charity working to build healthier communities. With more than 330 program sites, YMCA Centres of Community strive to build the foundations of community health by

Showcasing Canadian talent in the leadership of volunteers serving all ages and income levels, while ensuring children, teens and young adults have equal access to opportunity to reach their potential.

The YMCA's 10-year strategic plan places special emphasis on supporting people through their life-stage transitions. One way they are able to impact the lives of people living in the Greater Toronto Area (GTA) is through programs and services like, child care, employment, immigrant services, fitness, camping and outdoor education. In order to provide these programs, 3500 staff partners with volunteers every year to ensure that our communities are home to the healthiest children, teens and young adults.

Bryan Dawson, a fundraising volunteer with the YMCA of Greater Toronto, is one of 8500 volunteers who are an integral part of the organization. Working with Faiza Kanji, General Manager of Volunteer Development, Bryan has been able to use his expertise to help further the *Strong Start, Great Future Campaign.* Together, they have come up with a top ten list of things to remember when working with fundraising volunteers at the board or advisory committee level within a charity.

*10. If the timing is right, engage your volunteer in the development of your strategic plan.* Bryan is an established and prominent businessman in Ontario's Peel Region. Being the boss means that he has the flexibility to manage his time to get involved in volunteer work in the community. Having been involved in the creation of the YMCA's Strategic Plan for 2010-2020, he remains invested in helping the Y achieve the objectives all the way to 2020. Faiza believes that having volunteer input like Bryan's in the creation of the plan gave it an authentic voice. This was a great example of volunteers and staff working together.

*9. Have regular, two-way conversations with your volunteer about how you see yourselves working together towards achieving your strategic plan.* A key to success in fundraising is stewardship. One way to steward a volunteer and deepen trust is with consistent communication. This is especially important at the Y where funding comes from a mix of government, donor and fee-for-service programming. A constantly changing political landscape can often influence and change plans going forward. Keeping your fundraising volunteers informed of these events and how they impact your work demonstrates that you value their input and continued efforts. Sometimes this can even lead to creative problem solving.

*8. Be flexible with your interactions and meetings.* Volunteers need to be comfortable and confident bringing opportunities to you as soon as they arise. Often, a community member like Bryan can make an introduction to a key politician, businessman or interested donor. As staff, demonstrating flexibility in timing, locations and meeting formats lets fundraising volunteers know that you are adaptable and amenable to adjust your schedule to accommodate the needs of the volunteer. This makes them more likely to vouch for you and your organization and to extend their network to you.

*7. Do not underestimate your volunteer's history. Listen carefully to understand the journey that brought them to your door.* Knowing what motivates volunteers is key to a lasting relationship. Bryan says, "the YMCA is well known but not known well." Growing up in Canada with a single mom, two considerably older sisters and a brother with a disability, he always thought the YMCA consisted of a gym and a pool. When he visited a local Y and saw community programming for teen moms, youth employment and

specialized fitness classes for people of all abilities he was blown away and instantly felt a kinship at the Y. It is his humble upbringing that motivates him and allows him to connect with the mission, vision and values. Bryan is not just building his community through his work with the Y, his work helps him to connect with a very personal part of what shaped and motivates him.

*6. Grow your volunteer! Get to know where they are headed in their volunteer career and help them get there. (Even if it means they might end up volunteering elsewhere.)* Bryan's previous volunteer experience as Chair of the Board for a dynamic and growing college in Ontario, as well as other significant community organizations, has meant that he has been able to open doors and make connections for the YMCA on the ground. Embracing his past volunteer experience and taking an interest in his future volunteer goals has proved to be mutually beneficial. Bryan is currently a member of a new advisory committee at the Y with a mandate to raise funds to help fulfil the capital requirements of the Y's ten-year strategic plan.

*5. Finding out what your volunteer DOES NOT want to do is as important as finding out what they DO want to do.* Volunteers and staff have equally important and distinctive roles. As a charity, volunteers can communicate our vision in a way that is received by potential funders very differently than hearing the same message from a paid staff person. Bryan is clear with his staff partners at the Y that he will make introductions and open doors but when it comes to asking for the money, he prefers that to be a staff function. Understanding what he does not want to do leads to role clarity and draws on the strengths of both Bryan and Y staff.

*4. Place value on the fact that a volunteer's motivations of community development, self-satisfaction, personal growth and fun may not always be in line with your motivations as an employee.* Simply put, staff in a fundraising role is often focused on the seeds of a campaign, procuring money and resources and meeting campaign goals. Fundraising volunteers need to see the fruits of the campaign. They are interested in the impact stories, new buildings and innovative programming that they helped secure. These can often take time to come to fruition so it is important to keep in touch with your volunteers throughout the process and not only after funding is secured.

*3. Respect that cultivating relationships takes time so take the time that is needed.* The volunteer and staff partnership is strengthened when you know your volunteer's motivation, history and past service accomplishments. Uncovering and understanding your volunteer, building a relationship and cultivating trust takes time. Take the time to avoid unclear expectations, mission drift and the wrong fit down the line. Know what you want volunteers to do and look for someone who fits the bill and will keep you focused on your strategic plan.

*2. Be open to recognition in other forms.* Fundraising volunteers often gift their time in many places. They have branded swag and have attended lots of banquets and dinners. When you know your volunteer well you can customize recognition to suit their needs. Invite them to sit in on meetings or attend events where they may be able to network, where key decisions are being made, where other community leaders may be present or where they may have a chance to give voice to an issue. Nominate them for community-based awards and let them help you build the profile of your

Showcasing Canadian talent in the leadership of volunteers organization. Sing their praises to their family, business contacts and others with whom they have important relationships.

1. *Stay in touch regularly regardless of what may or may not be on the go.* This one is simple. Do not contact your volunteer only in times of need. Do make an effort to stay in touch even when a campaign is over. Send them a newspaper article or email them a link to a TED Talk\* that you think they would like. Ask them about their family, friends, hobbies and other volunteer pursuits. Send them updates about capital projects such as when zoning permits are submitted or when you first break ground or hire new staff for a new initiative they helped to fund. Stay in touch so that when the time comes to get work done again, you are already top of mind and not spending time catching up and reestablishing the relationship.

\* TED is a global set of conferences owned by the private non-profit Sapling Foundation, under the slogan "ideas worth spreading".

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*A volunteer herself from a very young age, Faiza Kanji has successfully managed volunteers at the Aga Khan Foundation Canada, Youth Employment Service, the Canadian Breast Cancer Foundation and Surrey Place Centre. She is currently General Manager, Volunteer Development at the YMCA of Greater Toronto and a Certified Volunteer Resources Manager (CVRM). Faiza is also an active member and volunteer of the Toronto Association for Volunteer Administrators and Professional Administrators of Volunteer Resources – Ontario (PAVR-O) where she has twice received the President's Award in recognition of her volunteer contributions. She is also a Regional Representative for the Canadian Journal of Volunteer Resources Management and a member of Canadian Administrators of Volunteer Resources.*

*When he is not volunteering, Bryan Dawson spends time ensuring the success of his company, Aircraft Appliances & Equipment Ltd. (AAE) He currently employs over 50 staff and is responsible for pioneering the development and manufacturing of naval filtration equipment used on many American and Canadian built frigates and destroyers, aircraft carriers, corvettes and large supply ships. Bryan was recognized for managing one of the City of Brampton's most successful and innovative businesses with the city's 2004 Outstanding Business Achievement Award in the High Technology category. Bryan was also selected by the Brampton Board of Trade as their 2004 Business Person of the Year.*

### **Where Did Everyone Go?**

by Marlene Beitz, Toronto, ON

"People are so apathetic these days." I moaned this cliché in a meeting recently while we were discussing changes in our fundraising strategy. The signature event that we had relied upon for the last ten years to give our community organization a financial boost was gradually losing steam. "Remember back when everyone used to volunteer? Everyone raised money for something," my colleague claimed, harkening back to the "good old days".



So what happened? Something shifted big time. Did people really change? I questioned my statement about current apathy levels. I remembered a time when it seemed like every school child, every mom and dad, and every neighbour was out doing something to raise money for their favourite organizations.

We can take a retrospective look to figure out what our volunteer forerunners did to keep their communities and organizations vibrant. No need for time machines or ghosts of fundraising past—we have the Internet. And if you are in the same generational range as I am, we have our memories.

The 1970s were a time of mega-volunteer involvement. Everyone seemed to have a cause to believe in. A montage of events would show us lots of door-to-door activity - not only Brownies, Scouts and schoolchildren selling everything from cookies, candles, safety flares and sponges, but also well-organized community campaigns divided into districts where neighbours would canvass their streets. Bake sales, raffles, car washes, dinners, dances, coffee houses, walk-a-thons, bike-a-thons and on and on. So much activity blended with socialized fun and emphasis on the project at hand—even if the return on investment was small by our current standards. Fundraising was labour-intensive.

If we are contemplating the fundraising strategies of earlier decades, we have to admire the dedication of the vast number of individuals who gave their time and energy to their community organizations. In fact, we must pay homage and recognize the incredible amount of goodness and generosity of spirit that flowed in abundance!

Fast forward. In the 1990s we see how certain things have changed. Canvassing neighbourhoods for donations has dwindled. There were those cases where well-intentioned canvassers fell down icy steps or were bitten by suspicious pets. Society in general has become more cautious and risk-averse. There was growing emphasis in the 1990s on fundraising plans that netted higher yields. The door-to-door sales are still occurring but product-in-hand sales have been replaced more frequently with pre-sale catalogued items, like magazine selections that can be ordered and delivered later. A look into community activity still shows us bake sales, raffles, social events (we could line dance instead of disco), collective cookbooks, yard sales, bingo nights and bonspiels. Not everything has changed, although the hairstyles appear tidier.

Pivotal events create change, often filtering through our social structures, even though we will not recognize it until sufficient time has passed. In 1977, Apple II was released, signaling a freedom and acceptance of finding new and better ways to do just about everything. So the 1990s became an age of profound awareness of the database and “working smarter”.

It would seem redundant to recruit and organize volunteers for a campaign that could achieve much more with much less, using a database of past donors and direct mail. The 1990s also gave us new emphasis on fundraising consultants, planned giving, monthly giving and the “direct ask”. Volunteers, who had always given generously of their time, also became a new target for written or verbal requests for financial donations, supporting the theory that if someone has already committed to belief in the work of the organization, they would also be more likely to give more to that organization. Volunteers remained a respected resource of community organizations, giving both time and money to form a strong and supportive backbone, but their numbers were decreasing.

In 1992, the World Wide Web went live. Consequently, societal shifts have realigned the ways and means of fundraising through the last half century. If we look at the current community landscape, a strategic fundraising plan of any local organization may still include bake sales and golf tournaments. I am still happy and nostalgic to buy Girl Guide cookies and World's Finest chocolate (product changes notwithstanding). Yet, these same organizations will most likely have embraced online methods of acquiring followers through social media and using PayPal for direct donations. Organizations have learned to work smarter, with decreasing government funding, resources and perhaps sadly, fewer fundraising volunteers.

So, when we consider where the volunteers and fundraising committees have gone, should we describe the reasons using words like "burnout", "hitting the wall" or "fundraising fatigue"? Is there apathy? We should think about what has happened within our organizations and within our society as a whole and consider "accountability", "vicarious liability", "screening" and "litigiousness", and relate these concepts to the declining number of volunteers populating our organizations.

Yes, time reveals change. Fundraising volunteers are not appearing as frequently or as easily as they have in past decades. But, the inherent nature of giving remains solid within people and within our communities. We have learned to fund services with awareness of focus on the people who will benefit, rather than focusing on just the projects. This is good. Volunteers are still around us too, within our communities, and they are not defined by apathy. They are unique individuals, open to being invited to contribute their very individualized gifts and like all of their volunteer forbearers, so worthy of our gratitude.

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*Marlene Beitz is a freelance writer, as well as a partner in policies and document preparation for organizations going through the Accreditation process. In the recent past, she has been a Manager of Volunteer Resources for a multi-service community support organization, and is the Past President of Halton AVA (Halton Association of Volunteer Administrators). Her volunteer roles include fundraising with the United Way, and training in active listening and crisis intervention with the local Distress Centre. Marlene has previously contributed articles to CJVRM and to E-Volunteerism on her favourite topic, the recognition of volunteers.*