

cultural volunteer ©

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WELCOME!

cultural volunteer (cv) is a free e-news and information service for arts management professionals. **cv** is published six times a year and comes to you from Lynn Blackadder, arts management consultant, www.lynnblackadder.com. You can choose to read **cv** in email or as a Word attachment. I hope you enjoy **cv**, but if you don't wish to receive future issues, please return this email typing 'unsubscribe' in the subject line.

IN THIS ISSUE ...

This issue of **cv** is dedicated to **managing fundraising volunteers**. Find out about the different kinds of fundraising roles, how to ensure volunteers are fit for the job, and learn about the legal issues that will affect their work.

WHY YOU SHOULD READ **cv** ...

cv is for arts management professionals who currently involve volunteers in their organisations, and for those who don't, but would like to find out more about volunteers.

cv aims to raise awareness of the resource cultural volunteers represent, and how to utilise it effectively.

cv actively campaigns for the recognition and progression of volunteers working in arts organisations.

cv can help you to better understand the nature of volunteering and how it relates to your organisation.

cv will regularly bring to your attention useful information, resources and commentary on volunteering in the cultural sector. Experts on volunteer management will feature, and we will explore topics raised by you in future issues.

FEATURE: Lynn Blackadder on managing fundraising volunteers

This issue is dedicated to the topic of managing fundraising volunteers. It will give you some ideas on how volunteers can help your organisation to fundraise, and introduce you to the legislation that regulates this area of volunteering. At the end of the newsletter, you will find a range of resources that will point you in the direction of more in-depth information and guidance.

Everybody's doing it

The Institute of Fundraising reported in December 2004 that volunteer fundraising is the most prevalent form of fundraising in the UK. It cited the 1997 *National Survey of Volunteering*, which estimated that two thirds of the 22 million people who volunteer every year do so as fundraisers. The Institute further said that volunteer-led fundraising activity is the most frequent way in which the majority of the public engage

with and encounter fundraising practice, for example, through attending events, coffee mornings or meeting house to house collectors.

How can volunteers help you fundraise?

There are several different kinds of fundraising where volunteers can help. The most familiar methods include:

- Organising large fundraising events, such as 'fun runs' or gala dinners.
- Street collecting.
- Raffles and lotteries.

Some less obvious methods include:

- Negotiating local sponsorship deals for charitable activities.
- Facilitating donations.
- Promoting legacies.

Also, if your volunteers help recruit new members to your organisation, then they are helping to raise money via subscription income. If they help you to retain members, e.g. through organising member events, then this is also fundraising.

Who does this kind of voluntary work?

Different methods of fundraising attract different kinds of volunteers with different motivations and skills. Negotiating sponsorship with a local bank manager for a charity event will require a different approach to convincing strangers on the street to part with their money for a good cause. So you will need to make sure that your volunteers are suited to their particular fundraising role.

Another important point to bear in mind is that not all volunteers who help you raise money think of themselves as 'fundraisers'. 'Fundraising' can be a dirty word to some volunteers, who prefer to think of the fundraising aspect of their volunteering as implicit rather than explicit. For example, I have known volunteers doing the same volunteering job in the same organisation (organising events for local members) who saw their roles as entirely different. One saw her role as that of promoting the organisation locally by organising events – an activity through which she was able to make a small profit to be donated at the end of the year. The other saw fundraising as the key aim of her volunteering, and wouldn't put on an event unless it made a certain amount of profit. You will need to clarify the purpose of volunteering for your volunteers and for your staff.

How can I find volunteers to fundraise?

Once you know what area of fundraising you want to focus on, then you can think about finding suitable volunteers. If volunteers are trying to persuade people to join, or donate money to your organisation, they must know what you do in detail. Therefore, a good place to look for volunteers will be your own organisation's members or audience. If people feel passionately about what you do – enough to support you financially – then they will be well placed to communicate what's good about your organisation to others. In this way, volunteers can be more effective than professional fundraisers. For example, volunteers in Friends organisations are usually very successful at recruiting new members through their own networks of like-minded people, or through talking to people who have just visited your venue. You can imagine how this kind of approach might also work well with the promotion of legacies, where a 'hard sell' approach is not appropriate.

If you are looking for volunteers who have specific skills – for example, sponsorship negotiation – then you might want to advertise for these people locally or through special charities that help place volunteers with professional skills, e.g. REACH. Or contact your local Arts & Business office who can offer advice and specialist training.

Training

If you are asking volunteers to raise money for your organisation, you must provide them with training to support them in their role. Depending on the tasks they will be performing, training can include:

- Awareness-raising about the organisation and its aims and objectives, key facts and figures, etc. This needs to happen regularly.
- Communications skills, including listening, influencing and negotiation skills.
- Specific method-based training that covers legal aspects e.g. licences for raffles, street collecting etc.

You may be able to train volunteers to deliver training for you. A fun and interesting way to learn how to do certain volunteer jobs well is to lead by example: ask experienced volunteers to talk about their experiences – good and bad – to groups of new volunteers. Regular, short and snappy, special information bulletins are also a good way of keeping people up to date on best practice.

Top tips

There are many aspects to managing fundraising volunteers – especially those that are managed remotely, such as regional groups. In addition to the legal aspects of management – detailed in the next section – the key points to bear in mind are:

- Make it clear to your volunteers what their role is, and how they are helping the organisation.
- Train your volunteers well and regularly.
- Establish agreed review and progress monitoring procedures.
- Ask your volunteers for their suggestions on how to do things better.
- Tell your volunteers how much they have raised and the impact on the organisation, and have a party to reward them!

LEGAL STUFF: What you need to know about fundraising volunteers and the law

Organisations raising money from the public through volunteers need to ensure that this is done sensitively and legally. This section introduces you to some of the key issues to be aware of when managing fundraising volunteers, and is based on the Institute of Fundraising Code of Practice for Volunteer Fundraising (see Resources below).

What is Volunteer Fundraising?

The Code defines a volunteer fundraiser as ‘someone who, without payment or other material benefit, raises money or engages in a fundraising activity for a charity or other philanthropic or benevolent institution’.

In what way can volunteers raise funds for your organisation?

It is important to establish whether volunteers are fundraising ‘on behalf of’ your organisation, or ‘in aid of’ your organisation. For example, groups of people can get together informally to fundraise ‘in aid of’ your organisation, without special authority, and therefore without your being responsible for their activities.

Alternatively, if a more formal arrangement is in place and organised groups of volunteers have special authority to regularly raise money 'on your behalf', i.e. in your name, then you have responsibilities to ensure that the funds are being raised in an appropriate and legal way.

Volunteers acting 'on behalf of' your organisation

Volunteers in this category will probably be fully-integrated into your organisation, and will see themselves as part of the organisation (e.g. an 'administrative arm'). There will be detailed policies, procedures and role summaries to advise and help volunteers carry out your organisation's charitable objectives on your behalf. They will therefore most likely have authority to use your registered charity name and number on fundraising literature and publicity. In order to ensure that such volunteers adhere to the guidelines provided, you will need to provide them with training and regular information updates on best practice. Your organisation should also aim to reimburse out-of-pocket expenses for your volunteers, and you should insure them for volunteering activities.

Volunteers acting 'in aid of' your organisation

On the other hand, volunteers fundraising 'in aid of' your organisation will not operate within such a detailed structure. You will need to make sure that volunteers understand the nature of the fundraising relationship, and you will need to explain the support (if any) that is available. The Code stipulates that it should be clear that the volunteer is 'simply raising funds for the organisation but acting in his or her own capacity', and your organisation will then not generally be responsible for the volunteer's actions. The Code also emphasises that the more support that is offered to fundraising volunteers, the more likely it is that the relationship will be 'on behalf of' your organisation. The Institute of Fundraising has produced a useful Guidance Note for 'in aid of' volunteer fundraisers who wish to fundraise for your organisation, and which you can adapt to meet your needs (see Resources below).

Establishing the status of volunteers in relation to your organisation can sometimes be tricky, and if you are in doubt, further information and advice can be sought from the *Voluntary Sector Legal Handbook* or the Charity Commission (see Resources below).

Creating a policy

Once you have clarified your organisation's relationship with your volunteers, you should create a volunteering policy that clearly sets out the aims of volunteer fundraising, how volunteers are to be supported, and the requirements expected of volunteers, e.g. handling charitable money. A policy of this type is good practice whenever you involve volunteers, but it is essential for fundraising volunteers to ensure that they are fully aware of their relationship to your organisation, and their responsibilities. The Code stresses that everyone in your organisation – paid or unpaid – should be clear about the nature of the role of fundraising volunteers.

Tax and VAT

The nature of the relationship that you have with your volunteers will determine whether or not volunteer fundraising events can be exempt from income and corporation tax and VAT. It is likely that volunteer fundraisers acting 'on behalf of' your organisation will fall within the exemption; however, the Inland Revenue can provide guidance (see Resources below).

Fundraising methods

As mentioned at the start of this issue, there are many different ways that volunteers can raise money for your organisation, and there are usually legal requirements attached to each. For example, there are

separate guidelines for volunteers negotiating sponsorship on behalf of organisations: charities are required by the Charities Commission to ensure that any sponsorship gained is 'appropriate' to the organisation, and commercial agreements need to be in place between the organisation and the sponsor which clearly state the nature of the relationship and what each party will receive from the financial partnership, e.g. the use of the sponsor's logo and their privileges as sponsors must be appropriate to the level of sponsorship provided. Your members or audience may well be put off by too much exposure or if they think a sponsor is inappropriate. Other fundraising methods such as raffles, lotteries or street collections will often require written permission or permits from the local authority. The Institute of Fundraising has published Codes of Practice to help you understand and adhere to the relevant requirements in the following areas:

- Charities Working with Business.
- Charity Challenge Events.
- Fundraising in Schools.
- Handling of Cash Donations.
- House to House Collections.
- Legacy Fundraising.
- Management of Static Collection Boxes.
- Outdoor Fundraising Events in the UK.
- Raffles and Lotteries.

RESOURCES: WHERE TO FIND OUT MORE

You should always seek expert advice before setting up a volunteer fundraising scheme, to ensure that you have understood the legislation as it applies to your particular fundraising activities. The following resources will help you to do this:

- **Sandy Adirondack** provides a web based service to help voluntary organisations keep up to date with the law affecting volunteering and all aspects of voluntary organisations (charity law, employment, health and safety, data protection etc) at www.sandy-a.co.uk/legal.htm. There is also a free email service which notifies you when the website is updated, and details are on the website. Sandy is a well-known freelance trainer and consultant on governance and how the law affects voluntary organisations. She is author of the widely used *Just About Managing? Effective management for voluntary organisations and community groups*, and co-author of *The Voluntary Sector Legal Handbook*.
- **The Voluntary Sector Legal Handbook** is available from The Directory of Social Change, priced £42, at <http://www.dsc.org.uk/charitybooks.html>, or call 08450 777707.
- **The Institute of Fundraising** Code of Practice *Fundraising Volunteers* and the *Example of Guidance for 'In Aid Of' Volunteers* are available at <http://www.institute-of-fundraising.org.uk> in the Codes of Fundraising Practice section. Both publications are free.
- **The Charity Commission for England and Wales** can advise on the nature of your relationship with your volunteers and general fundraising enquiries. Contact them at <http://www.charity-commission.gov.uk>, or on 0870 3330123.
- **Volunteering England** has free online guides and standard documents at www.volunteering.org.uk and there is a free information service on 0800 028 3304 from Mondays to Fridays 10.30-12.30 and from 14.00-16.00, or email Information@volunteeringengland.org.

- For advice on Tax and VAT contact the **Inland Revenue** at www.inlandrevenue.gov.uk/charities.

NEWSFLASH: Volunteers' Week, 1 – 7 June 2005

Volunteers' Week is the UK's annual celebration of the work volunteers do. During the Week events are held across the country to recognise, reward and recruit volunteers. Depending on where you are in the UK, there are special web sites which can provide you with a range of tools and resources to help you celebrate Volunteers' Week: Scotland <http://www.vds.org.uk/volunteersweek>, Wales www.wcva.org.uk, Northern Ireland www.volunteering-ni.org, and England www.volunteersweek.org.uk.

NEXT ISSUE

In June **cv** will be hearing about the new **volunteer programme at the Egypt Centre**, University of Wales, Swansea, and **what cultural volunteering has to say for itself in the Year of the Volunteer 2005**.

FEEDBACK

cv is keen to respond to your interests and needs. If you would like to forward your news and views, comment on content, or suggest a topic for discussion, please email lynn@lynnblackadder.com.

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