

PROFESSIONAL ASPECTS OF FUND RAISING *

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EVERYONE of us knows how difficult it is to have a proper perspective on those things which are very close to us. Our youngsters may be growing very rapidly but it takes a visit from an out-of-town relative and an exclamation of surprise as to how a child has grown to make us realize the important changes which are taking place. And it is more than a question of size, because some matters of great importance develop around us without our fully realizing how important and how part of our lives they really are. One of the great dangers we all recognize in a Democracy is the error of taking basic privileges and ideas for granted, forgetting the pain of their birth and development, and the fundamental importance of their place in the general scheme of things.

Something like this has apparently happened to us in the field of voluntary fund raising which has become so much a part of our daily life that we take it for granted. Perhaps we have not given enough thought to some of its aspects which are important to us and, from the point of view of our own best interest, must not be neglected or accepted passively.

To discuss at this late date the posi-

tion of the professional fund raiser in our communal activities, and his relationship with other representatives of the field of social service, is perhaps an indication of the fact that we are conscious of many important developments which should have received much more formal attention and thought during the past few years than we have given to them. However, relatively little attention had been paid to one of the basic factors in social work, and I am very pleased to present a few thoughts and ideas, not in an effort to develop any revolutionary or visionary propositions, but merely to organize and record some of the thinking which has developed through the years and which has become almost axiomatic.

Progress by Specialty

The history of social service in recent years has been the development of a number of specialties in the field, such as casework, group work and community organization. For some time much attention was given to methods of working out mutual relationships between these special phases of the work, with good results. Agencies in the group work field met regularly with those in the casework field to work out methods of cooperation, to set up joint projects, to use the skills of each in a manner

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supplementary to the other, to find areas in common and to clarify and develop mutual interests and objectives. Today there is little question about the special roles played by the various fields of social service and health work and the inter-relationship of these services in the total concept of community work. We take it for granted that the group worker, the caseworker, the community organizer and all of their related specialties are partners in one enterprise, each carrying his share of one over-all responsibility and all tied together for reasons of philosophy and optimum practical results.

Throughout these many discussions and during the course of many conferences the role of the fund raiser, and where he fits into this picture, has rarely been considered on a formal basis. However, as we all know, parallel with the current growth and development of the various accepted fields of social work there has been a comparable development in the field of fund raising. One could not take place without the other.

The tremendous upsurge of campaigning in the national and local scenes during the past three decades is an unprecedented development which brought our many services, local, national and overseas, to a level of development which makes continued successful fund raising imperative. In other words, the progress which has been recorded in the functional fields could be seriously jeopardized if success in the fund raising field did not keep pace. We are aware of the fact that the picture varies from community to community depending on size, history and other factors, but the observations attempted in this paper should be appropriate to all but the smallest of our communities. As with the other fields of social service, fund raising has been a reflection of the level of development and the needs of the times. In the days when social work was typified by

the friendly visitor and lady bountiful, and levels of service were hardly to be compared with those we enjoy today, the status of fund raising and the position it occupies was relatively comparable to these other activities.

"Spaceship" Period of Fund Raising

The intensification of need and service, the rapid growth of communities, the hectic and demanding days through which we have been living, especially since the advent of Hitler in 1933, have created a much greater sensitivity on the part of individuals and communities to their responsibilities in the development and support of community agencies and institutions. Fund raising had its own spaceship period of development in the thirties and forties, flying off into vast expanses and discovering great new resources and techniques. Recruitment into this field was rapid and unplanned. Men and women from a wide variety of other careers were attracted by the rapid growth and excitement of campaigning. Perhaps because of the wide divergence of background, training and interest, and because of the preoccupation of our functional workers with their own expanding and developing fields, the kinship between the fund raiser and the practitioner has not always been as obvious as it should be. The two fields developed simultaneously and along parallel lines but, as we all know, parallel lines do not meet except at infinity. We are still living in a finite world and, if these lines are to meet properly, we must develop the proper angles.

Pattern and Principle

The kind of pattern of community life which has developed in our American scene is obviously not the only kind which is possible. In other communities, in other countries, other answers to community problems have been found.

Sometimes the answer has rested almost exclusively with government, but even those of us who have pressed most urgently for increased governmental support of our growing community responsibilities have philosophically adhered to the opinion that it would be wrong for all social services to be the full responsibility of governmental bodies, financially or otherwise. It is our conviction that in our free voluntary society we have captured the essence of Democracy, and in our social services, and in our methods of supporting these services, we have brought the spirit of voluntary participation to a high plane, so that our methods contribute not only to the institutions of community life which we have developed but to Democracy itself. All of our free democratic institutions, like our public educational systems or religious bodies, our civic organizations, and, of course, our social services and health agencies, form the heart of the philosophy of our society. In spite of the evidence of some of the techniques which have been used in campaigns from time to time, we believe strongly that people should contribute because they *want* to contribute, because they believe in the causes to which they are contributing, and because they realize that this kind of voluntary support is essential to the strength of our philosophy of community life.

As with all problems in a Democracy these are basically questions of education and pressures of one kind or another. We believe, of course, in governmental support of many social services but we also believe that private resources must be expanded and strengthened, and exploited to the fullest possible degree. As a matter of fact our government subscribes heartily to this point of view, as is shown in the public-private program partnerships which do exist and in the special arrangements which are made enabling citizens to support com-

munity activities with government help through tax exemption both privately and corporately.

Campaigns a Rallying Point

Voluntary campaigns serve two great purposes. They are, of course, a means to an end—a method of providing the support for our institutions, agencies and services. We cannot properly view any contribution to any campaign without seeing beyond the dollar into the deed which is performed by the dollar. On the other hand, the campaign performs another function by virtue of its own special existence. It is a rallying point, a method of expression on the part of members of the community of their feeling of oneness, of their need to exercise their rights and privileges as citizens, and to carry their responsibilities as members of a free society. The campaign is a generator. It produces strength and energy, and brings to those involved a high sense of satisfaction in the accomplishment of something worthwhile and in the sharing of a great community responsibility.

These more intangible aspects of our voluntary campaigns are, paradoxically, very concrete and the whole pattern of our modern community development indicates recognition of the importance of this kind of group activity in a common constructive cause which is so important a factor in our modern civilization. The Community Chest movement, for example, dates back to the early days of World War I. There were many reasons why fund raising should have been difficult at that time, including rising taxation, widespread purchase of government bonds and the various pressures and insecurities of war time which surrounded every community. Many of these same factors, however, actually stimulated communities toward the development, rapid growth and spread of this kind of voluntary fund raising.

People came to accept the fact that this was a responsibility which they were expected to carry and the tremendous personal satisfaction which came to both worker and contributor was evidence of the far-reaching importance and depth of meaning of this development. There was also the factor of self-protection through central planning and clearance.

In our Jewish communities we have seen a similar kind of development culminating in the creation in 1938 of the UJA and the sky-rocketing of local organizations and campaigns. What greater demonstration can we see in retrospect of the strength of joint action and the security of common interest than we found in the campaigns and the spirit which they generated.

Today voluntary fund raising, with professional direction, is normal and natural, and, in fact, in some areas so many fund raising seeds have been scattered that there is danger of jungle growth unless there is planning both locally and nationally on an organized, professionally directed, volunteer conducted basis. Fund raising activities are here to stay for many good reasons and have become as much a part of our society as any phase of communal activities.

Role of Fund Raiser in Community Organization

Let us now consider some of the functions of the fund raiser to indicate specifically where he fits into the field of social work beyond the actual supplying of money. The fund raiser is one of the key figures in the field of community organization. For one thing he is a recruiting agent who attracts men and women from all sections of the community into the Campaign and in many cases provides them with their first interest and experience in communal service. In most fund raising organizations this activity includes year round plan-

ning and educational activities to bring continuity and increased effectiveness into the picture. The involvement of men and women in community work through this channel is one of the great contributions to the field of community organization and is the open door for many of these people through which they enter into every other phase of social service. The majority of volunteer workers have become active members of the community through campaign organizations and have gone into other fields from this rallying point. Certainly in a situation where recruitment, training and inspiration of volunteers is basic to the success of the entire program, this contribution on the part of fund raisers is of major importance.

The referral of cases to the various agencies in the community is a key aspect of the relationship between the fund raiser and the practitioner. Quite often, especially in the larger communities, the agencies may not know of certain needs which exist and many potential clients seriously in need of community help do not know of the resources available to them. The fund raiser frequently serves as a medium for bringing these two groups together.

Any campaigner knows that the volume of complaints against community agencies is at its heaviest during a period of fund raising. Sometimes, of course, this is because the potential contributor is not very interested in giving his support and is using these complaints as a means of escape. However, many times the solicitation itself presents an opportunity to record a complaint or to present pertinent and helpful information which was formerly not forthcoming because of inertia or lack of opportunity or lack of knowledge. Every agency knows that somewhere in the community there are negative attitudes towards itself, sometimes justifiable, but for the most part based on partial or faulty

information, or based on experiences over which the agency had no control. It is very difficult to locate these attitudes so that they can be dealt with effectively.

Experience has shown that by direct and honest handling of all complaints an agency can do tremendous good and can often turn negative attitudes into very friendly responses. Here again the fund raiser has an important role to play if he knows fully what his responsibilities are and is truly interested in the community as a whole. Let us not minimize the question of attitudes. Someone once referred to a colleague as a trouble shooter—"when you are in trouble," he said "he will shoot you." The fund raiser is in a very strategic position for handling these complaints, requests and suggestions as part of the community team.

Seeing Beyond the Dollar

In order to do so properly, however, he must know and understand the community's resources. He must appreciate that he has a primary stake in the community's overall program. He must see himself as an individual with responsibilities transcending the raising of funds. He can be a helpful channel for promoting community goodwill, in arranging for the services of the agencies where they are needed or, on the contrary, he can have a negative influence on the contributor, if only by default. The fund raiser must remember that the immediate solicitation, important as it is, is not always the only key factor in a contact with a member of the community. Many instances can be cited to illustrate this point but one very frequent experience should be sufficient. During a campaign one of the solicitors approaches the fund raiser and asks his help in arranging an adoptive placement for himself, a friend, or a member of the family. The fund raiser, in his eager-

ness to maintain the worker's interest, promises immediately to get the agency to make the necessary arrangements. The agency is placed in an untenable position because it cannot satisfy the campaigner's wishes and has not found much of an ally in the fund raiser whose immediate interest in a contribution may have alienated a valuable resource both from the immediate and long range point of view. The manner in which the fund raiser involves himself at the first point of contact and interprets the services of an agency is of course crucial.

Social agencies, as we all know, depend on the partnership which exists between the professional staff and the volunteers who constitute the boards, committees and special aides. We have referred to the fund raiser as an invaluable resource in the recruitment of agency leadership. In many communities, for example, social agencies turn to the fund raising organization for recommendations on new Board members and, frequently, interest demonstrated in the campaign is translated into very constructive activity for many years in the social agencies. But here too a sensitivity on the part of the fund raiser is required as well as a sense of direction and continuity. Otherwise a great and rich mine of community leadership will go untapped and unexplored. The reverse situation is also true and often members of social agency boards are recruited into the campaign organization. The supply of community volunteers, however, flows much more heavily from the campaign organization to the agencies.

Still another important role which the fund raiser should play is as an interpreter of community need, community service and community resources. The fund raiser again is in a very favorable position from which to discharge this responsibility. For example, we have referred to the complaints and the many questions which he receives in his day

to day contacts. This gives him an opportunity to talk with individuals who are displaying an interest in community life and these invaluable opportunities should be exploited to the fullest degree in the community's interest. Social workers have always been preoccupied with problems of interpretation and public relations. Agencies employ staffs, organize committees, create house organs, set up speakers' bureaus and spend considerable money in their efforts to effect a favorable climate in the community toward themselves. This is all to the good, but most of us know that often the audience is quite limited and the agency's own words about itself are sometimes looked upon with suspicion by those who may like the program but who do not care to listen to the commercial. Our problem is preventing these people from switching to another channel. The question is not whether the fund raiser should participate in this interpretive program but how well he is equipped to do so and how well he actually does the job. In order to do a capable job he must be well versed in the community's resources as well as in its problems and liabilities, and must be as deeply interested in raising community attitudes as he is in raising funds. It should be obvious that attitudes and fund raising are inseparable and that even from the point of view of self-interest in the fund raising field it is important to develop constructive and positive attitudes from a long range point of view.

Common Denominators

It is clear that the fund raiser and the other representatives of the field of community service have much in common from the point of view of responsibility and objective, and can augment and fortify the work which each does by recognizing the mutual responsibility which each has for the other. The relationship between the fund raiser and

the other practitioners, however, does not rest on an analysis of responsibility alone. The principles of human behavior and human relations can be applied to any endeavor where people are involved. This is certainly true in the fund raising field and much of the knowledge and understanding which underlies the work of a caseworker is applicable in the field of campaigning. A successful campaigner knows he must adjust his approach to the many volunteers with whom he has contact to fit the individual interests and characteristics of each. Great care is taken by the campaign organization to see that every potential contributor is approached in the most effective way and that every group is addressed in a manner which will be of greatest interest to itself. In short, a knowledge of the fundamental information employed by the various fields of social service can be of great help in successful campaigning.

I would not want to leave the impression that all fund raising is conducted on the basis of a conscious application of social work principles and techniques any more than I would want to imply that we have reached the state of perfection in any of our social service specialties. Quite often the ardent and devoted campaigner, both professional and volunteer, is so engrossed in the campaign itself and in the task of raising funds that this task becomes the end rather than the means to an end. Fund raising is an exciting experience. It has drama. It has pageantry. Unless a conscientious and continuous program of education and interpretation is carried on, the Campaign can seem to many people to be much more important and meaningful than the on-going day to day work of the agencies actually on the front line helping people. It is surprising how many individuals lose sight of the fact that the allocation, budgeting

and spending of money which is raised in any philanthropic campaign is the other side of the campaign coin and requires skill, delicacy, diplomacy, vision and very often courage.

Social work practitioners are sometimes resentfully aware of the fact that many fund raisers do not appreciate the work which the practitioners are doing and, therefore, tend to minimize the importance of the campaign organization in a kind of defensive-offensive action. They often wish that the fund raiser would be much more sensitive about the end product, the work of the agencies. But the reverse is also true and it is equally important that the practitioners know and appreciate the role of the fund raiser and the many problems with which he is confronted in securing support for the agencies.

In my own early days in Federation service I was on loan from a social agency to help during a campaign period. This was a very enlightening experience and has led me to the belief that social service practitioners would be well advised to participate wherever possible in other phases of community service, including actual fund raising. How often does the campaign organization have to plead with social agencies for good public relations material, for case stories, for human interest items which occur daily in the agencies?

Unfortunately it is often true that the functional practitioner is as little aware of the fund raiser's role as the fund raiser is of the practitioner's. We might well ask ourselves whether it is enough for a caseworker or a group worker to be proficient in his own skills without some understanding of the difficulties which are inherent in the raising of funds which permit him to exercise these skills on the job. The fund raiser and the social worker must view each other as partners, and must recognize that each is carrying out one necessary phase

of our volunteer method of supporting and executing our social service responsibilities. The fund raiser is a kind of bridge between the contributor and the social service program, bringing the help of the contributor directly to the agency. The practitioner in receiving this help must realize that without this bridge his work cannot be connected to the source of communal support. The skills of each are essential to the success of both.

Preparation for Fund Raising Career

Most of this discussion is based on practical experience and clearly indicates the importance of a strong kinship between the fund raiser and the social worker, and of a wholesome working relationship between the two. It is necessary to recognize that the fund raiser must be one of the family of specialists in the field of communal service. We should not think of ourselves as working side by side but as working hand in hand. Perhaps the time has come to do some serious thinking about the preparatory phase of a fund raising career. If we believe that the fund raiser should play all of the roles outlined in this paper and should play them with skill and in the proper atmosphere, then all of us should join forces and start planning ways and means for strengthening the situation which now exists. It is one thing to pledge allegiance to a point of view but we all know that a pledge is not good unless it is paid off.

Orientation programs for the social worker and fund raiser should be organized wherever both are functioning. Each should be expected to participate in the activities of the other and to acquire the greatest possible understanding of the principles, problems and limitations of each other's work. In Philadelphia, we have taken the first steps in arranging such orientation programs. For example, the members of the

Federation staff have special departmental meetings to discuss their own problems but full staff meetings and additional inter-departmental meetings are arranged from time to time to develop a sounder understanding of the whole picture. Our Director of Social Planning, by way of illustration, addresses meetings of the fund raisers and the public relations departments. Interesting and enlightening discussions take place which are already producing encouraging results. In addition, special meetings are arranged involving the executive directors and key staffs of the social agencies for discussion of fund raising problems and other phases of community service. This is just the beginning and has to be sandwiched into a picture of great pressure and immediate responsibilities, but the response has indicated the keen interest which each group has in the work of the others as well as the importance of this demonstration of mutual respect and feeling of partnership.

Perhaps we are now reaching the point where preparation for a fund raising career should be approached in the same manner as any other position in the field of social service. Schools of social work usually have courses dealing with community organization but full training in this field is still at a minimum. More specifically, training for fund raising within this field is hardly available except in on-the-job training programs. If the technical aspects of community service are to progress satisfactorily they must be accompanied by increasingly ef-

fective fund raising and more widespread acceptance of the philosophy that in a voluntary society this system is the best which has yet been devised and that, if it is truly effective and preserved, it must be strengthened and insured for the future. Many fund raisers in the field today, especially in the executive and sub-executive groups, are trained social workers and have found that this training and background have given them a depth of understanding of the fund raising responsibilities which is difficult to achieve in any other way. As time goes on, increasing numbers of fund raisers should have the benefit of this kind of training and experience to more closely knit the separate fields of social service into an increasingly effective whole. In the meantime, we must start where we are, concentrate on in-service orientation and training and plan now for more intensive preparation programs in the future.

The fund raiser is indeed a member of the professional family and his recognition in this role brings with it responsibility for the acquisition of knowledge, for the appreciation of his partners in the job and for participation with an eye towards the future and full community interest, rather than the immediate goal of extracting dollars from contributors. By the same token his colleagues should recognize the basic role which he has come to play in our society and should do everything possible to encourage this role and to accelerate the process of developing a full and effective partnership.