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On Our Cover • SAN FRANCISCO WOMEN AGAINST RAPE (SFWAR) PROVIDES RESOURCES, SUPPORT, ADVOCACY AND EDUCATION TO END SEXUAL VIOLENCE. ARYENISH BIRDIE IS PICTURED CANVASSING AT THE DOOR OF SFWAR SUPPORTER REV. JUDGE BEVERLEY PHILLIPS. SFWAR'S CANVASS RUNS FOR APPROXIMATELY 16 DAYS EACH YEAR AND RAISES ON AVERAGE \$14,000 FOR SURVIVORS OF RAPE AND SEXUAL ASSAULT.

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LETTER FROM THE CO-DIRECTOR

PRISCILLA HUNG



You're meeting with a group of volunteers who are enthusiastic about your organization's work. You ask, "Who wants to join the fundraising committee?" There are looks of discomfort; some people look away. You sigh and think, "Here we go again."

We often talk about building a strong team as one of the pillars of a solid individual donor fundraising program. But it can be like pulling teeth to recruit people — fundraising is seen as not fun, too pressured, and not as important as program work.

How can we bring fundraising and program work closer together so that more social justice activists see that fundraising is in fact political work? How can organizations change their culture and practices to value their fundraisers as activists? How can fundraising be seen as an important aspect of talking about vision and strategy, rather than being thought of as just a skill to learn or a tool to implement? Should fundraising even be delegated to a separate committee?

These are some of the questions we'll discuss at *Raising Change 2008: A Social Justice Fundraising Conference* on July 25 and 26 in San Francisco. We hope you'll be joining us! Even the process of working with a team to put the conference together helped us explore these questions further.

Forty amazing volunteers have made up the *Raising Change 2008* Organizing and Advisory committees, along with the GIFT Board of Directors (not to mention additional presenters and consultants who are volunteering their time). These volunteers donated funds along with their time to plan the program, do outreach, and raise more money to keep registration fees affordable. Their excitement and commitment continually inspired our staff, and it has been a pleasure to work with them. (Please visit www.grassrootsfundraising.org/raising_change for a list of members.)

Although we know the great benefits to having a fundraising team, we still learned some important lessons. By bringing in other people we created a greater investment in seeing the conference succeed. As staff, this meant having more transparency in decision-making and sharing the credit. We can't expect people to put in the time and energy to fundraise, including vouching for the conference to their personal contacts, without welcoming their ideas about how to do it. We may have lost some control of our message, but letting people talk about the conference in their own words brought us new insights into why people care about our work as well as new stories to share with others. We also made more links between our organization and the work that our team members do in other areas of their lives. People don't fundraise for us because they think it's all about us. It's about how we contribute to and support each other's work.

True, sometimes it felt like people were operating on their own rather than as a team, and sometimes I grumbled about how many donors I could've called in the hour I spent reminding committee members to make their calls. But without the dedication of these volunteers, the conference simply wouldn't be the dynamic, inclusive, inspiring experience that we are confident it will be. When you come to the *Raising Change* conference, please thank the many volunteers for their hard work!

In the spirit of team-building, we're pleased to announce that the merger of *Grassroots Fundraising Journal* and GIFT is official! You may have thought this already happened, but it's now legally complete. Over the next few months you'll see some exciting changes in the look and content of the *Journal* and in our improved website. We'd love to hear what you think!

Door-to-Door Canvassing: Connecting with the Community



BY JANET UPADHYE

Throughout its history, San Francisco Women Against Rape (SFWAR) has had a fierce dedication to bringing new people into the organization. We see rape and sexual assault as issues that everyone has a responsibility to end. Similarly, we feel the funding of our work should reflect this broad responsibility; thus we stress the importance of continually adding new donors to the organization.

This article explains how we find donors in their homes and give them an opportunity to donate to help create change in their community.

First, it's helpful to remember a fundraising rule of thumb: each year an organization will lose, on average, about one-third of its donors. So it makes sense that if you are dedicated to expanding your base, you need to acquire more than one-third of your total donors each year.

Such a goal can seem daunting if you don't already have strong systems for acquiring donors in place. In an effort to prioritize donor acquisition, SFWAR decided to reinstate a strategy that we had used in the 1990s: a canvass. A canvass is the activity of going door-to-door to tell folks about our services, educate around issues of rape and sexual assault, and ask people to support the work with a donation.

We reinstated the canvass in 2005, when our group of six canvassers went door-to-door in San Francisco for 16 days. We raised \$12,500 and added 321 new donors and just over 250 prospective donors to our database. The average gift was \$44.00. Given that we had started with a modest goal to raise \$7,000, we considered our results a huge fundraising and donor acquisition success.

Based on that success, we decided to hold the canvass every August as a community outreach, education, and donor acquisition strategy. Because a year-round canvass would require significantly more resources, we decided

against expanding the program in that way. Our annual canvass has continued to be successful, raising \$13,500 in 2006 and \$14,800 in 2007.

THE BENEFITS OF A CANVASS

The first time you put on a canvass, it may feel a bit labor intensive, but it pays off in the long term. The purpose of the canvass, in terms of fundraising, is to get people to give their first gift to the organization. On that basis, you then try to get them to give again.

From the outset, a canvass has a better donor acquisition rate than making cold calls or doing mass mailings — about 10 percent of people will give at the door compared to the 1 or 2 percent you expect from those other strategies.

"One awesome benefit of the canvass is to raise community visibility for your organization."

In terms of repeat gifts, about 10 percent of people who gave at the door will give to the organization again when asked in a follow-up phone or mail appeal during their initial membership year. The rate is even higher when you go back to their door and ask them to renew their gift the next year; at that time about 75 percent of folks will give again.

There are many other benefits we've discovered with the SFWAR canvass. One is that it enabled us to find out what people think about us. Last year our canvassers surveyed folks about SFWAR as they went to the doors, asking community members if they had heard of us. On average, 8 out of 10 people did not know we existed. Many of those people lived in the neighborhood where SFWAR is housed. So one awesome benefit of the canvass is to simply raise community visibility for your organization.

You are getting the word out, one door at a time. Another is that you are building a base of people with whom you have had a personal connection. This is priceless in the fundraising world.

SFWAR also uses the canvass as a tool for educating and organizing. We are attempting to break silence around issues of rape and sexual assault, dispel myths, and move people to take action. People take action in many different ways: with a donation, by volunteering, offering to DJ at the next event, or donating an art piece for the next silent auction. There are literally hundreds of resources for your

"In an average night in an urban community, a canvasser will be able to knock on 60 doors during their four-hour shift."

organization out there in the community, if you only ask.

In this article I explain step by step how SFWAR put together a door-to-door canvass. With this information I hope you are able to use canvassing as a successful fundraising, outreach, and donor acquisition strategy for your organization year after year.

BEFORE YOU BEGIN

Before beginning your canvass, keep in mind that it is extremely important to have a way to track all of the new information you will be bringing in. You need to have a place to store new donors' and prospects' names and addresses, enter gifts in order to get out quick thank yous, and capture the personal information you have learned about donors in order to begin to build a relationship with them.

If you go door-to-door and raise a lot of money with no way to continue to build a relationship with your new contacts, you have lost out on a major benefit of a canvass: to involve new people on a long-term basis with your organization. The best way to record all this information is in a donor database.

It is also good to know a few facts about canvassing before you begin in order to prepare yourself and other canvassers for what to expect at the door. In an average night in an urban community, a canvasser will be able to knock on 60 doors during their four-hour shift. About 25 people will open their doors and talk with your canvasser. Of those, about one in four will give a donation. Therefore on an average night of canvassing, one canvasser should acquire six new donors. In less urban areas, canvassers may not be able to knock on as many as 60 doors a night.

PLANNING A CANVASS

Once you have a way of tracking donor information, you can begin planning your canvass. There are five main steps.

Step One: Decide Where You Will Canvass

The first step is to look at the geographic area that you serve and map the area that you will be canvassing. Since SFWAR serves the city of San Francisco, I bought a San Francisco City and County map that showed all precincts and legislative districts. You can buy one of these maps at the Department of Elections or its equivalent in whatever county you will be canvassing. This map divides an area into precincts.

Essentially, canvassing is walking a precinct, organizing, and fundraising. The size of a precinct will vary depending on where you live. In San Francisco on an average night, two canvassers can canvass one precinct — or about eight blocks, which

comes out to an average of 60 doors. Depending on the density of the population, canvassers may take several nights to canvass a precinct, or canvassers may cover two precincts in one night.

On the map I highlighted the areas that I wanted to canvass, planning for each night of the canvass. For example, if you have six canvassers, you will plan three precincts to walk each night of the canvass (canvassers always go out in pairs). With this system, you can map your entire canvass.

In San Francisco there was no need for a city permit in order to canvass; you might want to check with the police department in your city to inquire about any requirements for canvassers.

Start in Your Neighborhood

When planning SFWAR's Canvass, I decided to start where SFWAR is actually housed: San Francisco's Mission District. That made it easy for the canvassers to refer to our location as they went door-to-door: "Hi, I am a canvasser for San Francisco Women Against Rape. We are the rape crisis center located in The Women's Building down the street. Have you heard of us?" A close geographic reference, if you are able to point to one, is a great way for people coming to the door to understand that you live in and serve their community.

Step Two: Come Up with a Script

There are generally six different parts to a canvass "script" or "rap." Scripts may vary greatly from organization to organization, but the following basic structure should be there.

1. Getting in the Door. One of the most important parts of door-to-door canvassing is what you say when the person opens the door. I call this part "Getting in the

Door.” The success of this opener will determine whether or not your prospect will give you the time to talk. You want the first thing you say to be interesting, friendly, and to give them something they can connect with if possible. An example of this would be, “Hi my name is Janet and I work for San Francisco Women Against Rape. We are the city’s rape crisis center and we provide services to more than 12,000 folks a year. This is a truly high number and shows the great need for rape crisis services. Have you heard of us?”

2. The Qualifier. The second thing you say is the “Qualifier.” The purpose of the qualifier is to determine whether or not this is a person who will be supportive of your organization. Canvassers need to maximize their time. A qualifier helps you to spend time with people who

“It’s standard in the canvass world to pay a commission.”

are potential supporters and not attempt to “convert” people who are not potential supporters. A typical SFWAR qualifier is, “I am looking for people who want to join the movement to end rape. Is that you?” Another qualifier is something as simple as, “I would like to tell you about your local rape crisis center. Do you have a minute for that?”

3. The Problem and the Solution. Next, let them know, briefly, what your organization does, both the problem you’re trying to solve and the solution you offer. Explain what you are working for and how are you doing that work. For example, SFWAR canvassers let the person at the door know that the problem is sexual violence and SFWAR is working to end that problem through services for survivors, education, and organizing.

4. The Ask. Now’s the time to ask the person at the door to support your work with a donation. Offer them as many different options for giving as possible: cash, check, credit card if you can. If they absolutely will not give at the door, ask them for their contact information so you can send them more information. Later, send newsletters and other information. As they learn more about the organization they will be more likely to become a donor in the future.

5. Get Contact Information. If they do give, make sure you get all of the contact information they are willing to give you: address, email address, and phone numbers.

6. Thank Them. Never leave a person’s door without thanking them. Whether they gave a donation, gave you their contact information, or just talked to you, they gave you their time and that is extremely important.

Step Three: Hire Canvassers

Before you bring people on board, determine how long the canvass will last and how many canvassers you want to go out, depending on the size of your territory.

Then, decide whether you will have paid canvassers or use volunteers.

SFWAR decided to hire and pay canvassers. Though it is possible for volunteer-based organizations to run a volunteer canvass, we did not have a solid base of volunteers who we could recruit into canvassing. If you do use volunteers for your canvass, make sure to give them a lot of appreciation. Canvassing is hard work. Canvassers walk up hills and stairs in the cold or the heat talking to strangers. It is a challenging job, but worth it when you connect with a stranger because you both want to take action to create a better world.

Whether your canvassers will be volunteer or paid, create a job description for the work. If you are paying your canvassers, you will also need to plan out their pay-

ment structure, hours, and whether they get a commission and at what level. SFWAR pays canvassers \$12 per hour

as a base, plus 10 percent of everything that they raise over \$100 in a night.

We felt it was important to pay canvassers a commission for two reasons. First, the difficulty of the work. From my own years in canvassing, I know the work can be challenging both physically and emotionally. Extra incentive to canvass can be very useful on some nights. Second, it’s standard in the canvass world to pay a commission, so we felt it only fair to meet that standard.

I also recommend going through an interview process with each canvasser. These people will be out in the community representing your organization. I have found it beneficial to hire canvassers with previous experience along with those who have no experience. Those with experience help the others along and set an example for effective ways of canvassing.

Step Four: Train Your Canvassers

Once you have hired your canvassers they should go through an intensive training. I divide trainings into three parts: the importance of grassroots fundraising, background on the organization, and canvassing skills.

The first part of the training outlines the importance of grassroots fundraising. This gives canvassers the sense that they are part of a larger movement that is working to create sustainability for nonprofits. I also stress the fact that fundraising is organizing.

Second, I do a training on SFWAR. I want the canvassers to feel that they know just about everything there is to know about the organization. They need to be able to answer any questions that people may have at the door. Canvassers also meet all of the staff, tour the office, and get a feel for the rest of the work. Arming your canvassers with vast knowledge of the organization will make them confident and competent when they are talking about it at the door.

Last, I do a canvass skills training that I call “Canvassing 101.” In this training I go over skills such as getting in the door, active listening, smaller contributions, judgment skills, other group skills, what to say in difficult situations, the ask, and money issues. It’s important for canvassers to

All of the donors and prospects (that is, people who gave their contact information) should then be added to your database. This means that unless they specified otherwise, they should be sent all mailings, invited to events, and called during the phonebank. In this way they

become more familiar with the organization; those who connect with a gift are likely to become long-term supporters. We keep non-givers from the canvass on our list for two years. If

they have not responded to appeals or invitations during that time I take them off the mailing list in order to save money on printing and mailing costs.

“It’s important for canvassers to know to expect that only one in four people they talk to will give a donation.”

know to expect that only one in four people they talk to will give a donation. They need to understand that having someone say no to you at the door is totally normal and to be expected.

Give your canvassers everything they will need to know in order to be ready to get out there, organize, and raise some money!

Step Five: Wrap Up

Make sure that you have a structure in place to wrap up the canvass in a way that will maximize its benefits. I like to send follow-up packets to everyone canvassers spoke with who gave their contact information but did not give a donation during the canvass. This packet usually has more information about SFWAR, such as a current newsletter and brochure. I include a picture of the canvasser so people can remember the person who came to the door. I also put an appeal letter and reply device in the packet to give folks a second opportunity to give. This works especially well for people who wanted to know more about the organization before they would give or for those who did not feel comfortable giving a canvasser money at the door. This method of follow-up yields, on average, a 10 percent success rate.

CONNECTING TO THE COMMUNITY

A canvass can be a hugely beneficial method of acquiring new donors that any organization can do. It also serves the purpose of getting your organization’s name out into the community and organizing people to get involved in your organization in other ways, such as volunteering or attending events. Canvassing can also be used as a means to survey the community on the work that your organization does.

There is no better way to connect folks in the community to the work you do than to go to their homes, introduce yourself, tell them about the work, and give them an opportunity to support you and get involved in the movement. **GFI**

JANET UPADHYE IS DEVELOPMENT DIRECTOR OF SFWAR. SHE CAN BE REACHED AT JANETUPADHYE@SFWAR.ORG.

You can find more information about how to do a canvass in The Accidental Fundraiser, by Stephanie Roth and Mimi Ho (order from www.josseybass.com).

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Just Tell Me:

What's the Best Way to Raise Money?

BY JAN MASAOKA

Like other crucial questions — What's the best way to meet someone? What's the best crop to grow? — this question deserves an answer, but the answer is complicated.

It's aggravating to have someone say (at a board meeting, for example), "Look at how *they* over there raise money! That's better than what we're doing . . . we should do *that!*" Or for a funder to tell you what they think is the best way to raise money: from major donors, or from government, or from black-tie dinners, or . . . you get the idea.

Think for a moment about two very successful stores: Target and Williams-Sonoma. Both sell cookware. Target sells inexpensive cookware through large stores in outlying areas, and it advertises through newsprint inserts in local newspapers. Williams-Sonoma sells expensive cookware through boutique stores in high-rent districts, and it advertises through glossy, full-color catalogs mailed to high-income zip codes. Each has put together a winning formula.

But what if Target were to try selling its colanders and measuring spoons at the same prices that Williams-Sonoma charges? (Would you buy a colander for \$60 at Target?) Or if Williams-Sonoma were to try using newsprint flyers instead of its glossy catalogs? Neither choice would work.

So when we ask, What's the best way to raise money? we need to start by figuring out who are the best potential supporters of our work and why, what those people are interested in, how to reach them, and how much to ask them for.

Before looking at two different strategies for similar organizations, let's consider for a moment how a fundraising strategy is different from a revenue strategy.

FUNDRAISING STRATEGY VS. REVENUE STRATEGY

Fundraising is about income that is contributed rather than earned. Fundraising strategies are ones that bring in money from individual donations, foundation grants,

corporate contributions, church giving programs, and the funding programs of other institutions. Individual donors give in response to vehicles such as direct mail, special events, galas, telephone fundraising, major individual gifts, annual membership donations, and so forth.

In contrast, earned revenue is *earned*. Tuitions, ticket sales to performances, magazine subscriptions, and almost all government contracts are examples of earned revenue. If you don't do the work, you don't get the money.

A revenue strategy looks broadly at the range of possibilities for financial support and combines both earned income and contributed income.

A revenue *strategy*, therefore, looks broadly at the range of possibilities for financial support and combines both earned income and contributed income. For example, a revenue strategy for a preschool might include government contracts, tuitions, donations, raffle, and a walk-athon. A revenue strategy for a dance troupe might include ticket sales, dona-

tions, donated space, class fees, and corporate sponsorships. A revenue strategy is a crucial part of any plan for long-term financial sustainability.

The decisions you make about your revenue strategy — that is, who should be supporting your work and how to go about soliciting that support — should be based not only on who is most likely to give you money or pay for your services, but what makes the most sense in terms of *who you are*, what kind of change you're trying to make in your community, and how your funding sources can help you get there.

Most nonprofits these days combine earned income (such as contracts, fees, sales) with contributed income. Like Target and Williams-Sonoma, each organization puts together a package based on its core supporters, its connections and positioning, and its cause.

DIFFERENT STRATEGIES FOR SIMILAR PROGRAMS

Let's look at how two after-school tutoring programs raise money:

Program A: Started in a racially diverse church, this program works with low-income kids who come for tutoring and after-school care in this mostly Latino, starting-to-gentrify neighborhood. Many of the volunteer tutors and board members are from the church, which draws from many neighborhoods across the city. With several upper-middle-class board members and the active support of the church, Program A raises \$80,000 each year through fundraising events and several individual donations of \$5,000 each.

Program B: With similar activities as Program A, Program B was started in a similar city quarter by a neighborhood center, itself often struggling for funds. Its volunteer tutors and board members are nearby residents, racially diverse, many in the helping professions themselves, and some well connected to city politics. Coupling the center's importance to the neighborhood with its board's connections, Program B is able to obtain a modest annual grant each year from city government. In addition, they receive donations from the electric utility and a local family foundation. Car washes and a raffle raise more community spirit than they do funds, but are still part of the total budget of \$80,000.

Both these community-based programs have developed successful fundraising strategies. Of these methods, which is the best? Individual donations? City grant? Foundations? Fundraising event? Corporate grants? The answer (like the answer to most questions) is: it depends.

It depends on the organization's external environment (the opportunities) and its internal strengths (the assets). Externally, in some cities there are many foundations while in others there are practically none. Organizational assets include who's involved in the organization — including constituents, board members, volunteers, and staff. Other assets include the relationships the organization has built with other groups and its connections to government agencies, local corporations, and community leaders.

The revenue strategy will be guided by the organization's philosophy about who should form the core of their support. Finally, the cause itself is important: some causes lend themselves more naturally to certain kinds of revenue. Corporations are less likely to support a prisoner-support organization than churches or government might be. Older constituents may be less likely to support international causes than younger constituents. (Note: these are just hypothetical examples!)

GETTING FROM HERE TO THERE

Developing a comprehensive revenue strategy also involves choices about which programs to operate, a topic that is beyond the scope of this article. We can, however, look at some, if not all, of the steps that our two after-school programs can use. An assessment starts with a list of revenue streams and a look at the amount raised, profitability, potential for growth, non-financial impacts, and what's

needed for success.

Even if you don't think you have a revenue strategy, you already do have some kind of configuration of ways to obtain money. Start by taking a good look at the ones you are already using. In most cases a good first step is to expand the revenue areas where you are already having success and to

When considering a new fundraising effort such as an art auction or corporate sponsorships each program will need to start by seeing whether it has the right people and talent on hand, and if not, whether it's worth starting to develop the abilities needed.

link your various vehicles together. For example, Program A's major gifts program, which relies on about ten board members asking their friends for donations, doesn't take much effort but raises \$40,000 each year. In contrast, Program A's walk-a-thon raises about \$5,000 in addition to raising community spirit and enthusiasm. Program A should focus its attention on expanding its major donor program, and it should maintain — but not increase — the walk-a-thon level of activity. They can also link these activities by bringing donors to the walk-a-thon and using the walk-a-thon to identify prospects for larger donations.

In contrast, Program B receives more than half its funding from city government. Program B needs to be sure it continues to have board members who are well connected with city government and who can work to increase that grant as well as to obtain grants from other city departments. (Too often community nonprofits start to neglect the importance of board member connections in maintaining government funding.) Program B has shown it has the writing and presentation skills to obtain some small grants, so a good area for investment of time may be in grantwriting. It can continue to do a couple of car washes and a raffle each year, but instead of expanding those areas as fundraisers, they should make sure they do the best job they can of using them to raise spirits and community ownership.

One of these programs has more individual donors and more ability to work with individual donors while the other has more support from institutions (government,

foundations) and more ability to work with institutions. When considering a new fundraising effort — such as an art auction or corporate sponsorships — each program will need to start by seeing whether it has the right people and talent on hand, and if not, whether it's worth starting to develop the abilities needed.

One of Program B's foundation funders is probably telling them that they should start a major gifts program, just as one of Program A's donors is probably telling them to get government money. Actually, Program B's revenue strategy should probably continue to focus on government, while Program A should focus on major donors. Each can consider new strategies carefully, paying attention to opportunities and assets, rather than just trying to find "the best way to raise money."

In particular, both the board (as a body) and the board members (as individuals) have crucial roles to play in every organization. The board as a whole should participate in creating, modifying, and reviewing the revenue strategy and evaluating how each component is performing. And instead of a "give, get, or get out" approach, each board member will have a role to play in the *revenue strategy* (not just the fundraising strategy). For instance, one board member may be recruited to bring the organization to the attention of local government agencies for contracts. Another may be recruited to chair the walk-a-thon. Still a

third, who "hates to raise money" and works in the food industry, can connect the staff to restaurants that would be interested in buying the organic herbs from your organization's garden farm.

The board as a whole should participate in creating, modifying, and reviewing the revenue strategy and evaluating how each component is performing.

Just like the Target and Williams-Sonoma example, it may not work to take a page out of someone else's book. Begin by assessing what your organization has going for it internally and externally, and choose a mix that suits what you've got. Then, and perhaps most important, focus on doing well in those areas and recruiting the right board members and others to

increase those fundraising areas before spreading out into new ones.

The best way to raise money? The one that has the potential to increase (or at least stay level), and the one that you already have the skills and connections to tap. **GF**

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We are pleased that this article is appearing simultaneously in the e-journal Blue Avocado (blueavocado.org) and the Grassroots Fundraising Journal.

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They Said They Would Raise Money... Now What?

Twelve Tips to Help Board Members Hold Each Other Accountable

BY ANDY ROBINSON

If, as the saying goes, the road to oblivion is paved with good intentions, then I've met a lot of board members walking down that road. Off they go, carting their families, pets, friends, jobs, bills, chores, and health concerns along with them. Somewhere in that cart is a list of board tasks, including fundraising. Guess which tasks fall to the bottom of the list, buried at the bottom of that cart?

Although it's important to honor the best intentions of our volunteer leaders, it's even more important to support them and help them to follow through on those intentions. Here are a dozen ideas that can assist you in creating a culture of fundraising on your board and — even better — a culture of accountability. Not every idea is relevant to every organization, so treat this list as a menu and choose the items that best fit your needs and circumstances.

1. Identify a Sparkplug or a Team of Sparkplugs — Then Empower Them to Lead. If you're striving to build a culture of fundraising on your board, somebody needs to say to the other board members, peer to peer, "Yes, this is our job. Let's figure out how we can support each other to follow through better on commitments."

If the word *sparkplug* doesn't work for you, how about coach? Or cheerleader? Or enforcer? Without assertive board leadership, the ideas that follow will be much less effective.

2. Develop a Board Agreement or Job Description That Includes Fundraising. Be explicit and detailed. The best of these documents are reciprocal: they itemize both what you expect of the board members and what they can expect in return. For example, if you want them to raise money, it's only fair for board members to receive relevant training, materials, and list of fundraising activities from which to choose.

3. At Each Board Meeting, Everyone Self-Reports. Take ten minutes for a go-around so every board member can say,

"This is what I've done since the last meeting to support fundraising." There's no shaming or blaming, just self-reporting. However, the expectation of having to speak might provide enough incentive to get those wavering souls to follow through in advance of the meeting.

4. Create a Line Item in the Budget for Board Giving. When the annual budget is prepared, trustees must ask themselves, "How much can we collectively give? Are we a \$2,000

If board and staff do something together then credit the gift to the board member.

board? A \$5,000 board? Is \$10,000 a good goal?" Debate the number, set a target, then hand out pledge cards. At board meetings, each budget review serves as an indirect reminder to those who have not yet fulfilled their pledges.

5. Create a Line Item for Board Fundraising. This is money that board members raise above and beyond their own personal giving. Once again, the board debates a goal, sets a dollar target, and reviews progress at each meeting.

If board and staff do something together — for example, they team up to meet with a major donor — then credit the gift to the board member. Since our overall goal is to promote follow-through, it helps to reinforce positive behavior.

6. Solicit Challenge Gifts Based on Board Behavior — Not Necessarily Tied to Dollars Raised. For example, approach a major donor or foundation with the following request: "To inspire our board, we'd like a challenge gift of \$_____ contingent on board involvement in major donor outreach. We suggest a benchmark of 20 asks — if board members participate in 20 donor meetings, we collect your gift." The beauty of this approach is that it's tied to behavior, not results; you can approach 20 prospects, get turned down 20 times, and still receive the challenge grant.

7. **Provide Regular Fundraising Training to Your Board.** This could be a full-day workshop at an annual retreat or twenty minutes at every other board meeting for a quick practice session.

9. **Offer Rewards to Board Members Who Make an Effort.** Approach local restaurants for free meals. Ask local shops for gift certificates. Encourage a bed-and-breakfast or local hotel to provide a free night during their slow season. (If giving freebies to the board feels like a conflict of interest, it might be worth investing a little money to buy these meals or gifts.) As appropriate, reward prizes to those who meet their individual goals, show courage, and inspire others.

10. **Make It Competitive.** This won't work with every organization, but I've seen boards that respond well to competition. Divide the board into two teams — Greens vs. Blues, Hummingbirds vs. Woodpeckers, whatever — and see which team can meet with the greatest number of donors, generate the largest turnout for the annual event, raise the most money. Once again, prizes can be used as incentives or acknowledgment.

11. **Define Real Consequences for Not Meeting Commitments — Then Apply Them.** What happens when board members don't meet their goals? More pointedly, what do you do if they flat-out refuse to participate? Are they asked to take on other responsibilities to free up the willing fundraisers? Are they encouraged to leave the board or take a different role within the organization?

These consequences can't be mandated from above, but they need to be discussed openly: "With the knowledge that we're all volunteers, how do we set expectations for each other? How do we hold each other accountable? If people can't meet our shared expectations, is it appropriate to transition them off the board? If so, how can we do this in a transparent and humane way?"

12. **Bring in New Blood.** New people often bring a fresh perspective. If they're recruited with the understanding that fundraising is a shared responsibility, they are much less likely to say, "That's not my job," or "I didn't join this board to raise money." When recruiting, remember to let prospective board members know that board fundraisers receive training, support, appreciation... and maybe even prizes!

Finally, remember that culture change is long-term process. Your investment in creating a culture of fundraising will pay off slowly at first, but with persistence and patience it can transform your board and, by extension, your entire organization. The sooner you begin, the sooner you win... so get started now. **GF**

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As appropriate, reward prizes to those who meet their individual goals, show courage, and inspire others.

8. **Invite a Group of Your Donors to Talk About Why They Give.** Once each year, dedicate time to hear from your supporters: why they care about your work, how they like to be approached, and so on. Include Q&A. Demystify fundraising by having a conversation with actual donors.

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Building Your Fundraising Team: *Working with Volunteers*

BY KIM KLEIN

Once someone asked me, “If you could offer one piece of advice to fundraising staff, what would it be?” I had no idea. How could I limit myself to one piece of advice? As a consultant, I am in the advice business! I could easier limit myself to one calorie.

But as with many questions that seem silly at first, I think of that question often. And from time to time, I get the same question again. Each time, I answer with one of several clichés that I and others have trumpeted over the years: “You get more money by asking than by not asking,” or “Fundraising is 10 percent planning and 90 percent follow-up calls,” or “Thank before you bank.”

These truisms are actually important things to remember, but if I had to give one piece of advice today, it would be this: “Stop complaining about your volunteers.” Every time a complaint comes into your head about working with volunteers or about a particular volunteer, dismiss it. Don’t engage in conversations that are litanies of complaints about board members and volunteers. Don’t ever say, “I could do it better myself” or “I could do it faster myself.”

Why not? Don’t volunteers often say they will do something, and then not do it? Don’t board members shirk their fundraising responsibilities as much as they can? Couldn’t you do a better job yourself?

Yes, yes, and yes. But volunteers are a fact of nonprofit life. Without volunteers, our sector would not exist. And if you take a few minutes to think about the challenges of working with volunteers from their point of view, you’ll often find they don’t feel they have the support, direction, or follow-up communication from staff that will enable and encourage them to do what they said they’d do.

Complaining about volunteers is like complaining about getting older — it is pointless, and it uses up energy that could be more effectively used organizing the volunteers.

In this article, I will give you seven suggestions for working with volunteers around fundraising. They are not simple “lose ten pounds without dieting” tips, and they

require discipline to implement. But they work, and the more time you spend doing what these tips suggest, the less time you will have to complain and the less you will have to complain about.

WHY HAVE VOLUNTEERS

First, let’s step back a bit and remember why we have volunteers. We recruit volunteers for four reasons:

1. You Can’t Do Everything Yourself. Not only do you not have the time to do everything yourself, it’s good to remember that you will not live forever and you will not always work for this organization. So you have to take the time to train others in how to do your work. Showing people how to do things, sending people to trainings, checking in with volunteers on a regular basis — by phone, not just email — is part of the cost of doing business. When you’re ready to leave your position, you may just have a fully trained volunteer who wants to take your place. At the least you’ll have a volunteer corps ready to help the next staff person.

2. We Rely on Some Unpaid Labor to Get Our Work Done. Nonprofit organizations cannot afford the kind of staffing required to do all the fundraising their organization needs to do, nor would that be an appropriate use of a nonprofit’s money. Even very large institutions, such as hospitals or universities, rely on volunteer labor. Grassroots organizations generally have two kinds of staff: low-paid and unpaid. Think of your volunteers as unpaid staff.

3. Getting Volunteers from Your Community to Help with Fundraising Is a Great Way to Engage Your Community in the Work You Do. We often imagine that no one wants to volunteer to do fundraising. That is simply not true. For some people, certain kinds of fundraising are the easiest and most comfortable way for them to be involved. Becoming more intentional about recruiting volunteers to your fundraising team will strengthen your relationships in the community. The key is to match the volunteer with the type of tasks he or she enjoys.

“We often imagine that no one wants to volunteer to do fundraising. That is simply not true.”

4. People Who Give Time, Like People Who Give Money, Legitimate Our Work. If all the work in your organization could be done by paid staff, what would be the difference between your organization and any for-profit business? What would justify your claim that you are doing work for the public benefit that cannot be done by a business? People who give time, like people who give money, legitimate our work. An organization that cannot find any volunteers is often an organization that the community does not care about. In terms of fundraising, volunteers are often more credible to donors than paid staff, particularly because fundraising volunteers are not only giving their time, they are also giving their money.

SEVEN TIPS ON BEING A GOOD VOLUNTEER MANAGER

So how can we effectively work with volunteers to improve our fundraising? If you are a good fundraiser, you know the following secrets of fundraising. Here, we can see how these basics also apply to volunteer recruitment and management. Three stories on these pages illustrate some of these points.

The Beauty of Having a Plan

Marge is a 65-year-old social worker who runs a program that helps seniors with financial issues. She has two other staff and 40 volunteers. Due to funding cutbacks, Marge has to raise money for this program. She puts together a fundraising committee made up of seniors who have used the service, along with former volunteers and a few business leaders. Soon, she is frustrated.

"The committee is terrible," Marge explains to me. "They are good hearted, but they do nothing. I don't have time to hold their hands and make sure they're doing what they said they'd do. Can you help?"

I call each member of the fundraising team and ask them what they think their job is, how well they think they are doing that job, and how well Marge thinks they are doing their job. One says, "We are told to fundraise, but I don't know what that means. I asked some friends to donate and they did. Is that enough?" Another volunteer confides that Marge always seems disappointed in them. The chair of the committee says, "Marge told me that although she liked each of us, she wished we would just stay home if we couldn't produce more money."

I bring everyone together to develop a clear plan, with goals, timelines, and a task list, and then give them a brief training on identifying donors and asking for money. Marge identifies a board member who is willing to work with her in doing follow-up with committee members. Over the next three months, the committee starts raising money, and even though they don't reach all of their goals, the improvement encourages everyone to keep at it.

Follow-up Is Key

Kyra is a volunteer with a statewide organization that provides legal services to undocumented immigrants. She has many connections with foundations and individual donors, and she agrees to be on the organization's fundraising committee. The executive director explains that because committee members come from around the state, the committee will not meet in person, but it will have conference calls every two or three months and otherwise be in touch by email. Kyra misses the first conference call, but gets an email saying, "Please contact Joe Stein at the Moreliberal Foundation and ask him why our proposal was turned down. Proposal is attached."

She reads the proposal and calls Joe, who is an old friend. He tells her, "I like what they are doing, but we don't fund legal services — it says so right in our guidelines." Kyra is slightly embarrassed that she didn't read the guidelines before the call, and she emails the executive director with this information. He responds, "Can't he make an exception? They make other exceptions." Kyra is not comfortable calling Joe back to ask, and decides to think about it for a while. She never gets back to the executive director, and no one follows up with her. Eventually, she stops participating in meetings.

1. People Are More Likely to Give When the Request Is Specific. We know that asking someone, "Can you help with something?" or "Could you make a donation?" does not work as well as, "Would you consider a \$500 gift?" Asking a volunteer to "help with fundraising" just about ensures a bad experience. Instead, an approach such as, "Would you ask these three people for \$500 each by next Friday?" is much more likely to be successful. Don't leave any room for doubt about what the job is. Be as specific as humanly possible in describing what is to be done. Not only will the job more likely get done, accountability is much easier when both parties agree on what the job is.

2. People Are More Likely to Give When They See That Other People Have Given. Just as donors are reassured when they see that other people have made donations, volunteers need to know that others are also doing their share. Just as donors like to know that their gift makes a difference and is part of a bigger effort, volunteers need to work in teams. Volunteers need to know the whole game plan, their part in it, and that other people are doing their own parts. Even reliable volunteers drop the ball or drop out entirely when they see they have to carry the burden alone or when they are constantly asked to do things while those who are not reliable are not asked to do things.

3. People Are More Likely to Give When You're Persistent. We know that in fundraising, following up a mail appeal with a phone call, especially from someone who knows the

donor, can nearly double the response rate. Similarly, following up with volunteers who have chosen tasks related to fundraising by encouraging and supporting them to be able to do what they said they'd do will result in a much more effective volunteer effort.

4. People Are More Likely to Give When They Are Thanked and Appreciated. Just as donors are more likely to give again, and give more, if they are thanked sincerely for their gifts, volunteers will also be more likely to give their time again if they are thanked for whatever effort they make. Perhaps they are not working at their capacity, but they are helping. Personal notes and phone calls are very important. Email is a great time saver and promotes efficiency, but it can be cold and distancing, so it needs to be mixed with other methods of communication. Also, don't use email just to remind people of their tasks. Use it to wish people happy birthday, to inquire if they had a good vacation, or to give them an update on the general work of the organization.

5. People Appreciate Honesty. Organizations make mistakes. They charge a credit card twice when the donor only gave once, they send a thank you for the wrong amount,

A Little Communication Goes a Long Way

Lizzie, a graphic designer, has been volunteering at her local Peace and Justice group. Seeing that she's an enthusiastic and reliable volunteer, the group asks Lizzie to join the major gifts committee. She agrees reluctantly. Lizzie hates asking for money in person and she feels foolish on the phone. Not surprisingly, she doesn't raise any money. The executive director says of her, "She used to be so reliable, but now she is just not living up to her commitments."

No one speaks to Lizzie about why she's not doing well at this task, but she can feel the disappointment in the other committee members.

Finally, the development director talks to Lizzie directly and, learning that Lizzie is not happy on the major gifts committee, they brainstorm other ways that Lizzie can be involved. As a result, Lizzie forms a marketing and outreach committee for the organization's website, working closely with the group's designer. Her enthusiasm for working with the group returns and donations through the website increase.

they get into financial trouble because an employee is incompetent. Though such things are bound to happen, organizations keep their donors when they tell them the truth and when they are open to hearing about and to correct a mistake they may have made.

Volunteers, too, appreciate honesty, even if it hurts a little. Rather than just pretend that it doesn't matter if the volunteer didn't do what they volunteered to do, talk to them about it. It does matter. If getting the task done

doesn't matter, then it is just make-work and not a good use of time. If it does matter, then not having it done has consequences. When volunteers feel appreciated for what they have done and held accountable for what they haven't done, they feel important and secure. They learn that what they do and what they say matters to the organization.

6. Some People Are Going to Say Yes and Never Pay. In fundraising, we know that some gifts pledged are just not going to be fulfilled. Similarly, some people are not good volunteers, and no amount of organizing, appreciating, or structuring will change that. They take up valuable space at meetings and they use up resources, both psychological and physical, that are sorely needed elsewhere. Ideally, another volunteer or the executive director will have a talk with such a person and gently but firmly explain that there is no room for someone who repeatedly does not follow through with tasks and ask the person to leave the committee. Sometimes, for one reason or another, we have to put up with people like this, but we don't keep letting them take on tasks that they will keep not doing.

7. Similarly, Some People Are Never Going to Give.

Just as we have to ask more people for money than the number of donors we need, we also have to recruit more volunteers than we need. Generally, you need about one-third more volunteers than you think you will to get the job done.

Let's say you are planning a major gifts campaign and you need ten volunteers to solicit all the prospects. Recruit 13 from the beginning. Each person will start out with slightly less work than if the work were divided over ten people, but very quickly one or two people will drop out, and over time another one or two people won't finish their tasks.

By the middle of the campaign, you are down to the nine or ten people that you needed without any one of them having to be martyred to get the job done. Although some volunteers are always reliable, and some are never reliable, the ones in the middle are hard to predict. They may be reliable for one campaign and not another, or for one strategy but not another.

EASIER SAID THAN DONE

Obviously, all of this advice is easy for me to write and much harder for me or anyone else to implement in the course of very busy lives. But not implementing these simple steps will lead not only to misunderstanding and hurt feelings but also to little money raised. Volunteers are a critical part of our work and, like all of us, they respond to structure, to transparency, to appreciation, and to being included in creating the plans. **GF**

KIM KLEIN IS THE COFOUNDER AND PUBLISHER EMERITUS OF THE GRASSROOTS FUNDRAISING JOURNAL.

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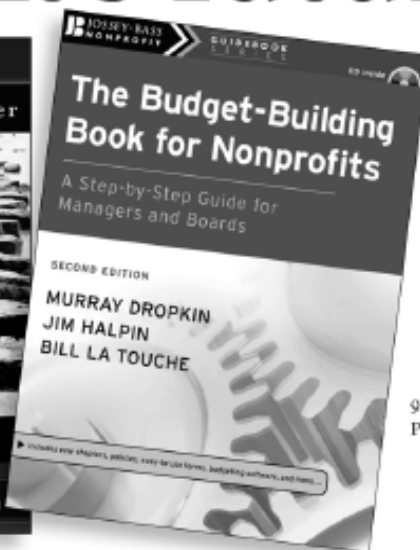
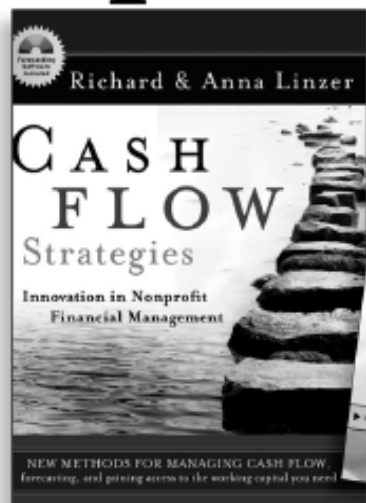
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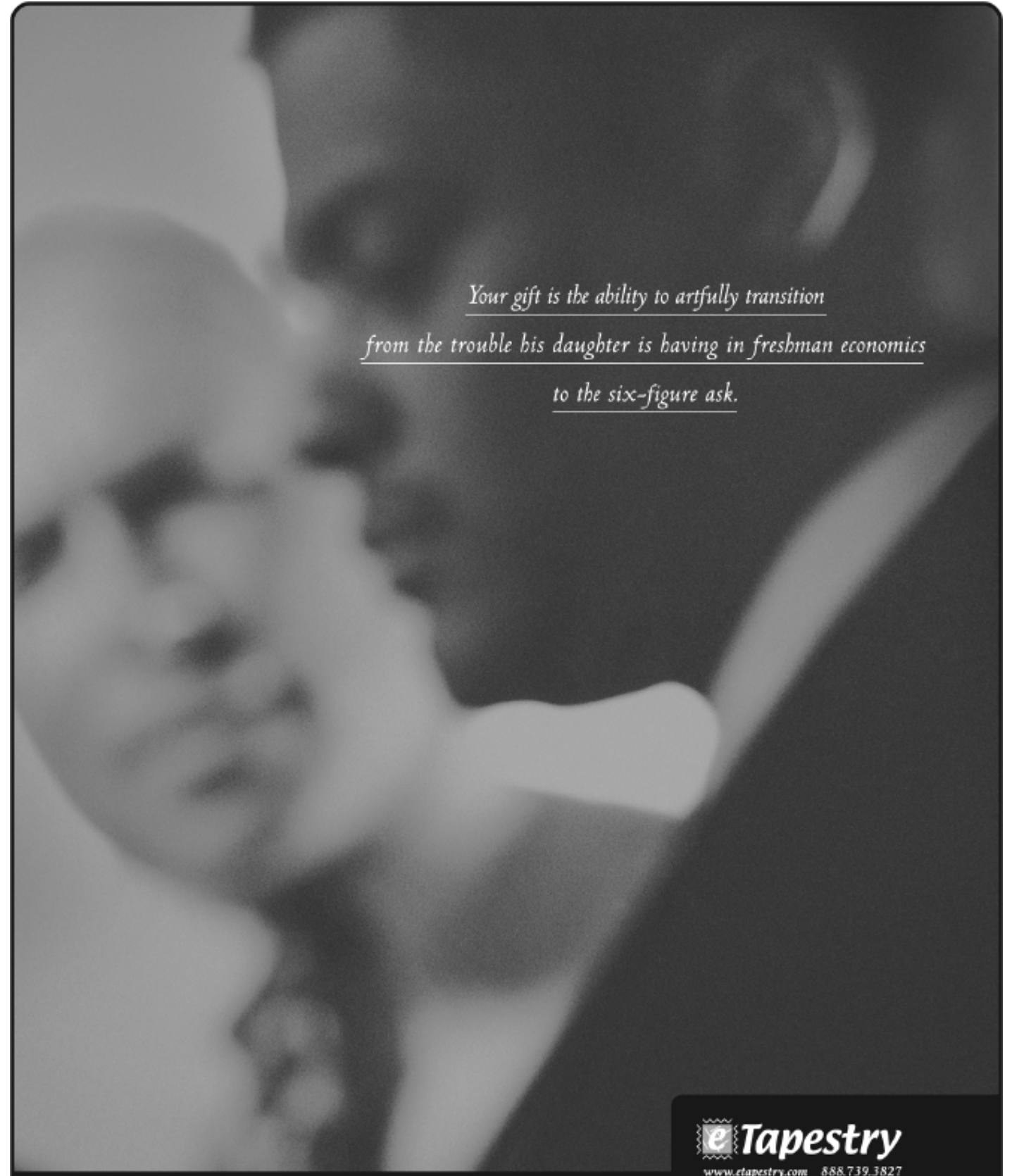
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