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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 easily 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.

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**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**

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