



WE ACT Board of Directors Left to Right: Roberto Lebron, Dennis Derryck, Eric Goldstein, Gregory Anderson, Vernice Miller-Travis, Jeff Jones, Peggy Shepard, Pat Terry, Hope Plasha and Phil Morrow. (Not pictured: Regina L. Smith and Charles H. Allison, Jr.)

# Supporting Volunteer Fundraisers

By Karen Topakian

**THE SUCCESS OF VOLUNTEERS**—including board members—raising money for an organization hinges on many factors. Some are outside of the organization’s control, like the volunteer’s availability, competing commitments, and donor response. But some factors that will make it more likely that your volunteers will be successful are very much within the organization’s purview. These include setting thoughtful criteria for recruitment of volunteers, providing training and positive encouragement, assessing and matching skills and aptitude with appropriate fundraising activities, and integrating volunteers and fundraising into the organization.

I talked with five organizations to learn from their first-hand experiences on building a strong volunteer fundraising team. The organizations range in budget from \$500,000 to \$4 million;

some serve a specific community, while others are international; some have more than 40 active volunteers, while others have no volunteers outside of the board. Despite these differences, a few key lessons emerged that were shared across all of them. Remember, you can start with “best practices” but then need to tailor them to fit your organization’s culture and priorities, as the organizations share below.

## **Recruitment: Prior Fundraising Experience Not Required**

When starting to recruit fundraising volunteers and board members, some organizations’ main criteria is prior fundraising experience. However, criteria that can’t be taught—including belief in the mission of the organization and acceptance of fundraising responsibilities— are generally much more

important as starting criteria because they will result in more dedicated volunteers. Ursula Embola, director of development at WE ACT, mostly looks for people who are passionate about environmental justice, knowing that passion is sometimes more important than skill in motivating others to give or ask for money. The first thing that Mark Camp, deputy executive director of Cultural Survival, looks for in members is that “they readily acknowledge the responsibility of board members to contribute to the organization as ambassadors of fundraising.”

On a practical level, it’s just not always possible for all recruits to have direct fundraising experience. When assessing potential fundraising volunteers, several organizations instead look for transferable skills and attributes. Jovida Ross,

Exhale’s director of programs, sees clear alignment with the skills of their volunteer talk-line counselors, from whom they recruit to participate in volunteer fundraising campaigns twice a year. “Fundraising is about building relationships. Peer-based counseling is all about building rapport. They are well trained at building relationships quickly over the phone. A significant part of their training is practicing listening skills.”

Rebecca Tarbotton, executive director of Rainforest Action Network, often recruits house party hosts; she knows that fundraising experience can be the least important quality of a good host. In addition to interest and excitement in the organization, she looks for people who have a large social network and are known to throw good events. Because hosts are asked to make

a lead gift at their house party, she also looks for people who have the ability and willingness to make a significant personal donation to the organization.

Several other organizations also prioritized the size and quality of the networks that volunteer recruits are connected to as being a primary consideration. Sometimes, when asked to think of people whom they might contact to be donors to the organization, volunteers automatically respond, “I don’t know anyone who can give.” Says Roger Doughty, executive director of Horizons Foundation, “You have to help them probe their list in ways they might not think of. Ask, have they been part of another board? Or who did you go to college with? I try to push in a collegial way.”

### Don’t Forget Training

Given that experienced organizations know that bringing fundraising understanding and skills aren’t most important or always possible for new volunteers, they need to dedicate resources to training their volunteers after they are recruited. When their volunteers are board members, many build fundraising training into their existing board meetings or board retreats. Doughty focuses on just a few key things to get his board fundraising-ready: “Creating a safe space with people so they can say, ‘this really freaks me out.’ We make it so they can ask any question. And we do role-plays, getting more familiar with key messaging points,” says Doughty.

In working with her volunteer counselors, “The thing they need the most help with is ‘the ask’ and

## Featured Organizations



### Cultural Survival

Partners with indigenous communities around the world to defend their land, their language, and their culture.



### Exhale

National organization addressing the emotional health and well-being of women and men after abortion. Operates an after-abortion talk-line.



### Horizons Foundation

Community foundation rooted in and dedicated to the lesbian, gay, bisexual, and transgender community.



### Rainforest Action Network

International environmental organization working to protect rainforests and the human rights of those living in and around those forests.



### WE ACT for Environmental Justice

Community-based organization whose mission is to build healthy communities by assuring that people of color and/or low-income people participate meaningfully in the creation of sound and fair policies and practices that protect environmental health.

knowing what to say,” says Ross. In Exhale’s volunteer training they also focus on role-playing and practicing talking points. One of their key talking points is emphasizing that the organization is a community-led and community-funded effort. Exhale also provides their volunteers with exercises to determine whom they might ask in their own networks for a donation.

Many of the organizations I spoke with bring in outside professionals to help with fundraising training, either because of a lack of staff capacity or because outsiders can often command volunteers’ attention in a different way, especially for board members. Cultural Survival has guest speakers come to board meetings to present both theoretical and concrete fundraising knowledge, from how donors think to how to do an ask.

### **Tailoring Support and Tasks**

Providing training for their fundraising volunteers, in addition to equipping them with important skills and knowledge, also helps facilitate a key step in supporting the volunteers: assessing who is ready and who needs more support. The cookie-cutter approach of providing everyone with the same training, assigning them the same tasks, and offering the group the same follow-up support doesn’t always work well when there are varying levels of comfort and experience.

Says Embola, “Part of my job during the training is to watch everyone. We put them in trial situations of donor asks under the supervision of trained facilitators and then determine who is an ace at it and who needs more training.” Doughty recommends accompanying volunteers to a donor meeting before sending them on their own so that staff have an opportunity to see their approach first-hand.

This tailoring of support also extends to the fundraising responsibilities they are expected to fulfill. Cultural Survival specifically looks at two distinct networks of board members: those who have connections to individuals with significant wealth and those who are well-networked with institutional donors, such as foundations or international government agencies. Where their networks lie determines how they support the organization in fundraising.

Rainforest Action Network acknowledges that some people are better suited as hosts for their house parties while others might be better at making the pitch. Good hosts are experienced at throwing events, have large networks to draw from, and can support the organization with their own gift. They’ve found that the most effective people to make the pitch are those who have an emotional connection to their work and constituency, who are not afraid to talk about the money needed to get the work done, and who have the respect of the community.

### **Bringing it Home**

Even after committing the time to strong recruitment, effective training, and tailoring responsibilities, it can be difficult to maintain the momentum of volunteer-led fundraising. The important work of integrating volunteers’ work into the organization can take a few different forms depending on the group.

For example, Exhale is dedicated to creating a culture of fundraising at their organization, much of which is connected to how the organizational leadership views grassroots fundraising. They talk about their fundraising as being community-supported, mission-linked, and part of movement-building—and they share this perspective with all the volunteers they bring in.

Horizons has begun to incorporate a fundraising activity into every board meeting to take advantage of everyone being together. For example, during the mid-meeting break in their three-hour meetings, they team up board members to spend a few minutes making thank you calls to donors. “This activity was met with enthusiasm,” says Doughty. “People feel like it’s a good use of time. It gives them a chance to do something positive all together.”

At Rainforest Action Network, the key is to commit staff support to their volunteers so that support becomes part of the staff’s responsibilities. For their house parties and other fundraising events, the staff manages the logistics, crafts the invitation email (signed by the host) and sends it out, and provides follow-up emails and thank you notes. Their hosts can focus on pulling together their invitation list and getting people to the event, while having a staff person stay on top of the other event details.

### **One Final Lesson**

As you can see, there are many ways to involve strong fundraising volunteers. No matter how you do it, one thing continues to be true and bears repeating: appreciate your volunteers! As summed up by Ursula Embola of WE ACT, “When we brag about our board members, it’s more likely they’ll brag about us. We are very proud of the people we have on our team.” ■

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## “I Want to Be a Grassroots Fundraising Leader.”

—An Interview with Yamili Quezada



**YAMILI QUEZADA IS AN EMERGING LEADER** in her community in Denver, CO, but she is no stranger to leadership. As a community college student and volunteer in community-based organizations, she is hard-working, ambitious, and inspirational. The

Journal talked with Yamili at Padres & Jóvenes Unidos, where she has served as a youth leader for 5 years and is currently their Grassroots Fundraising Organizer. Her fundraising enthusiasm caught their attention and they quickly tapped her to help organize their upcoming 20th anniversary celebration.

### **Knowing that you could probably work on a variety of things at Padres & Jóvenes Unidos, what compelled you to do fundraising?**

I'm the president and founder of the International Club at Red Rocks Community College and we organize events to support global causes. We raised almost \$1,000 for Haiti after the earthquake, so I already had some fundraising experience. But what motivated me to fundraise for my own community was attending the youth organizing summer institute. I heard the story of César Chavez and how he moved his people to contribute. Then we looked at the budget of Padres & Jóvenes Unidos and saw how most of the money comes from grants. It was an eye-opening moment for me to reflect on César Chavez and the idea that our own people should fund our liberation.

We were asked to raise money to help pay for the summer institute because there was a shortfall in the grant funding. Leaders participating in the institute were asked to each raise \$150 in one month. I raised \$300 in two weeks. We considered different options, like sending out a letter or holding an event. We decided that personal, face-to-face asks would be most effective. So I asked my teachers, people who supported me in the past, my peers. We found that personal asks were indeed most effective – and the most challenging, but also the most exciting.

### **What do you see as the role of a fundraiser?**

My goal in my new role at Padres & Jóvenes Unidos is to institute a culture of fundraising, to get the staff, the youth, and the members involved. Most of our members come from working families, really hard-working families. We want to rely more on our community, where everyone can get excited about fundraising and be part of it. My role as a leader is to

develop the needed skills and share them with others. I am proud of being able to include everyone in this larger movement. I think that's what fundraising really allows us to do.

### **How does the organization support you in becoming a strong fundraising leader?**

Padres & Jóvenes Unidos is committed to developing my leadership skills. That's why this work has been really important to me. I came in without a lot of fundraising expertise – they could have found someone else, but they're invested in my leadership development. I really appreciate the opportunity to develop skills and grow. They provide me with support – materials to read, templates and examples, taking me to other groups' fundraising events. Most importantly, the organization provides me with people that I can learn from, especially Elsa Oliva Rocha, my mentor and Director of Operations, and Debra Brown, fundraising staff for the Colorado Community Organizing Collaborative. They give me things to start with and build off of, but also give me room to be creative and improve things.

### **What do you think makes you a successful fundraiser?**

Two things: motivation and ambition. I'm a person who sets a goal and goes for it. When something is important to me, I have a strong drive to just do it. When you're motivated, that enthusiasm is contagious. I want to share it with others!

### **How would you recommend organizations get others like you involved in fundraising?**

I think the best way to motivate others is similar to how I myself got motivated: Do some education, link it to inspiring stories, and show where the organization stands – and where it wants to be. I think it's really hard to get people excited when they don't understand the situation. People need a reason for taking action.

### **What advice would you give to other people who are just getting started in fundraising or are hesitant to get started?**

No excuses, just go for it. Just try it. Just do the personal ask. It was a little intimidating at first and so I had to gain that strength from somewhere else – I got it from the story of César Chavez. Care about the work you're doing, learn about it, and link it to your people's history. Liberation comes from us, the people! This is why we must continue to fundraise. ■