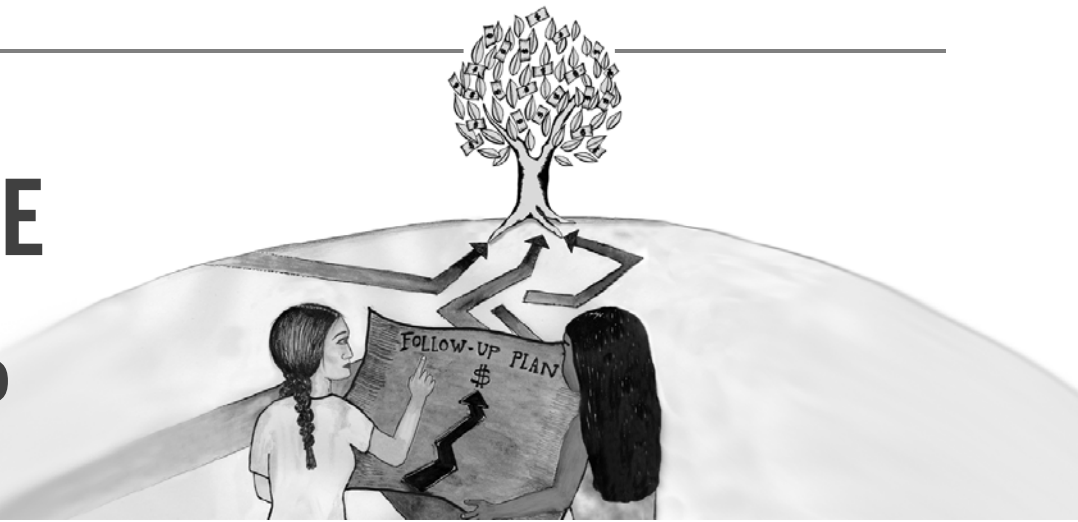


# The IMPORTANCE of FOLLOW-UP

BY KIM KLEIN



I maintain a neat desk and I am a well-organized person. But I do have this pile of stuff next to my desk that sometimes gets out of hand. In that pile go articles I *should* read (meaning I need to wait until they are out of date before I feel OK about throwing them away), and invitations to events, lectures, and conferences I *should* go to (I wait until these are over before deciding and then I can say, “Whoops — how did the time pass so fast?”).

Once in a while something gets into that pile that I both need and want to deal with. So it was the other day. Going through this pile, I found a nice binder from a group I volunteer for. I didn’t recognize it at first and when I opened it, I was assailed with waves of guilt: in it was a list of five people I had promised to ask for major gifts. My binder contained sample letters, reply cards, return envelopes, the case statement, the timeline for the campaign (long over), and articles from the *Grassroots Fundraising Journal* written by me. I had totally forgotten about my commitment!

I called another member of the committee. “Did you do your major donor calls?” I asked. “What calls?” I told him to look on his desk for a nice binder and call me back. He found it a few days later at home in a pile of magazines. “I totally forgot about it,” he confessed. But then he said, “Did they ever call and remind us? I am not usually such a flake.” Neither of us could remember being called after the campaign started, which is pretty much proof that we weren’t.

My late father often quoted the poet, Robert Service, “A promise made is a debt unpaid,” and he would have had no use for what I am about to say. He never forgot a commitment and would have finished his major donor calls a few days after getting the binder. Few people are as exemplary as that, and certainly I am not one of them.

I am not trying to shift responsibility away from me. However, a simple phone call (or two) from the development director would have kept that binder in my sight, and I would have kept my commitment. The sad part is that the development director put a lot of work and thought into the binder. She has a really excellent case statement of the organization and a detailed description of the major

donor campaign. She has all the materials we need, including stamps to use for our letters or thank-you notes.

She probably thinks we are worthless volunteers. I haven’t called her to apologize because I am too wrought with guilt. What will I say? The truth: “I totally forgot.” What will she say? “Oh, that’s OK. I only spent a week or two on those binders.”

Or, I could tell a tiny lie: “I was fostering a herd of sheep for the Humane Society Adoption Program and a baby lamb made a nest in the binder and I didn’t have the heart to move her.” What will she say to that? “How cute. I didn’t know you could have sheep in Berkeley.”

I’d better stick to the infallible, “I got the flu and have been laid low for months. You didn’t get it? How lucky.” She can’t really get mad at me for my lies, except I always know when people are lying and I think she will too.

My solution of just hoping the whole thing will be forgotten in the course of time doesn’t seem that healthy either, but it doesn’t require doing anything.

## UNDERSTANDING THE NATURE OF FOLLOW-UP

If fundraising were divided into increments of ten, it would look like this:

**1, 2.** Create the mission, goals and objectives. Be clear about the vision of the organization and spell out how the world will be different because this group exists.

**3.** Create a budget and a fundraising plan. Fill in all the details of the fundraising plan and create an evaluation mechanism so that you know how well the plan is working and what changes need to be made.

**4,5.** Train volunteers and board members to work the plan.

**6.** Begin to work the plan.

**7.** Follow up.

**8.** Follow up.

**9.** Follow up.

**10.** Celebrate success and follow up with volunteers to see if they want to do it again next year.

## Making A Follow-Up Plan

Being able to do follow-up requires building it into the overall fundraising plan. Such a plan for a major gifts campaign looks something like this:

### MAJOR GIFTS CAMPAIGN

*Goal:* \$50,000

*Timeframe:* 8 weeks.

*Process:* Each volunteer will ask one prospect each week for eight weeks

*Prospects needed:* Eight times the number of volunteers minus one (for example, if there are eight volunteers, only plan on them soliciting a total of seven prospects a week — 56 in all — because you know that one or more volunteers will not complete their commitment).

**Week One:** Development director completes the following tasks:

- Create Gift Range Chart
- Identify prospects
- Prepare materials
- Recruit board members and volunteers
- Recruit chair of committee

**Week Two:** Development director and committee chair complete the following tasks:

- Train board and volunteers
- Pass out packets
- Set weekly goals with each volunteer.
- Give each volunteer their first two prospect names.
- Launch campaign with a party and with each volunteer making their own gift.

**Week Three:**

- At the end of the week, Chair calls each volunteer to see how they are doing.
- Chair or development director posts e-mail to all volunteers to let them know how the campaign is going so far.
- Development director sends anyone who has contacted their two people two more names.

**Week Four:**

- In the middle of the week, Chair calls each volunteer to see how they are doing.
  - At this point, at least one person will not have done what they said they would do. The chair negotiates with them as to when it will be done.
- Development director sends e-mail detailing what each person has done.
- Development director sends everyone who has completed their tasks one more name.

**Week Five:**

- At the beginning of the week, the development director calls each volunteer to see how they are doing.
  - One, possibly two, volunteers will not be keeping commitments.

- The development director holds a check-in meeting to share stories and rally everyone for the final three weeks. Make it festive. Have people share stories. It is possible that the one or two people not doing their work will decide to get busy. If they are not at the meeting, it is fairly clear they are not able to participate in this campaign the way they had thought.

**Week Six:**

- At the beginning of the week, the development director calls anyone who is not doing well to ask whether they have made any progress. Some volunteers may just be behind. They were slow getting out of the starting gate, but now they see how well the campaign is going and they promise to catch up. Some (hopefully not more than one) is not doing anything and is not going to. The Development Director ascertains this by asking if this person would be relieved to get rid of their prospect names and not have any more responsibility right now. Tell the volunteer that what is most important is to be truthful about their ability (or lack of) to complete their assignment.
- At the end of the week, the Chair calls everyone who is doing well to see how they are doing. If anyone is done, the Chair asks if this person would mind taking one or two extra names. These are the names that the volunteer who did not complete their task did not get to. By not giving out names until the names already given out are done, your campaign is at most two-four names behind. If the volunteer agrees to do them, great. Otherwise, the Chair should finish up these names.
- The development director or Chair sends out an e-mail detailing progress to date (you should now be three-fourths of the way to your goal).

**Week Seven:**

- At the beginning of the week, Chair calls any other committee members who have not made their contacts to tell them that the development director is giving their names to someone else.
- Give final two names to the volunteers.
- The development director calls everyone who is doing well at the end of the week and sends an e-mail reminding the volunteers that this is the final stretch. Calculate how close you are to your goal, and put that in the e-mail.

**Week Eight:**

- At the end of the week, the development director calls everyone to see how they are doing.
- The development director sends e-mail summarizing success of campaign and thanking each person for what they have done.

The development director organizes a party for the next week to celebrate success and debrief the campaign.

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In other words, follow-up is fully 30 to 40 percent of all the work that needs to be done. Yet few people plan to spend 30 percent of their work time doing follow-up. Undoubtedly some readers are thinking, “Where am I going to get that time?”

One place is the time you save by not having to clean up after, plan around, or restart things because people didn’t do what they said they would.

Let me go back to my story. I heard from someone else in the organization that after a while the development director simply called all the major donor prospects herself. She did a good job and the organization reached its goal, so there was apparently little or no loss there. But I cannot believe that doing all the work for those of us who had not done it took less time than it would have to call us to remind us of our commitments.

In spite of this, everywhere I go I hear board members, volunteers, even staff admit that they have taken on something and not done it. They feel bad, but when I probe a little, I often learn that part of the problem is that there has been no follow-up.

To work with people successfully, keep in mind that in any agreement there is a tacit understanding that the person who makes the commitment will get help in keeping it, usually from the person or people to whom they made the commitment. What kind of help that is might be negotiable, so that everyone coming to a meeting called for 10 a.m. might get a reminder e-mail, whereas a volunteer who has agreed to come to a site visit with a funder would get a follow-up phone call.

Further, if I don’t do my work even after appropriate follow-up, I should understand that the work either doesn’t get done or is given to another volunteer. That way, the organization creates a culture that encourages people to

commit only to things they really can do and to know they are accountable for their actions.

When the staff just does the work that board or volunteers have committed to but not done, they make it clear that it doesn’t matter to them whether the volunteers do the work or not. Ultimately the volunteers get the message that they are not that important. If I feel it doesn’t matter whether I do something I said I would do, in the press of many commitments I am much less inclined to do it. Over time, a system such as this will practically train volunteers to make commitments they won’t keep.

Finally, follow-up is not just done by the development director. For example, in my story, the development director could have asked the chair of the committee to call each of us. The development director’s follow-up would then have been to get the committee chair to do his work, and his work would have included getting us to do ours. The development director is then available to troubleshoot or help out, but she is also freed up to do her vast amounts of other work.

As you can see from the example, follow-up means both staying on top of people to get their job done and building into the plan the fact that a few people won’t be able to complete their tasks. We do not pretend that follow-up ensures that all tasks get done — it ensures that a far higher percentage of them do, and it also offers the option to put a back-up plan into action.

Part of planning is making the time for the follow-up. If you don’t have time for follow-up, you don’t have time to do this project at all. To be sure, even with follow-up, some people are going to flake, but without follow-up, you will only get work out of people like my Dad, who are few and far between. **GF**

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