

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 In that pile go articles I *should* read (meaning I need to wait until they are out of date before I feel OK about throwing them away), and invitations to events, lectures, and conferences I *should* go to (I wait until these are over before deciding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.

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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The Thank-You Note

By KIM KLEIN

In 1977 a woman sent \$25 to an advocacy group working on women's health issues. The organization was run collectively by 2 utterly overworked and underpaid staff and 40 volunteers. They had won recognition for their work exposing the dangers of the Dalkon Shield IUD and championing reproductive rights issues. The donor did not receive a thank-you note for her gift. However, she did receive the group's newsletter and heard about the group from time to time.

A year after her gift, when she received a letter requesting a renewal, she threw it away. Some time later, she learned that a friend of hers was in the group. "That group sounds good," she told her friend, "but they don't even have it together enough to send thank-you notes for gifts. I can't imagine that they are really fiscally sound or that they use money properly."

Her friend defended the group, saying, "They do really good work. Maybe they should take time to thank people, but saying they don't use their money wisely is an unfair conclusion." The one-time donor replied, "It is fair. It is my only contact with them. They claim to want a broad base of support, yet they show no regard for their supporters. But since you are in the group, I'll give them something." She sent \$15.

During the year between the donor's \$25 gift and her \$15 one, the group had hired me to be their fundraiser. I sent the donor a scrawled, three-line thank-you note:

"Thanks for your gift of \$15. It's a help financially and also a great morale boost. We'll keep in touch."

Two weeks later, the woman sent \$1,500.

VALUING ALL GIFTS

Although I had been drilled from childhood about the propriety of sending thank-you notes, I never really believed they were worth much one way or the other until that lesson. After I met that donor, she told me she often

sent relatively small gifts to groups she liked to see what they would do. If she sent \$100 or more (a lot of money in 1977) most groups would thank her. But that would not tell her how much regard they had for smaller donors. "Most grassroots groups talk a good line about class and everyone being welcomed," she said, "but the only people they really care about are the program officers of foundations and wealthy donors."

As it turned out, this woman was very wealthy, but she wanted to give money only to groups that had proved they valued all gifts. I was flabbergasted that a sign of proof could be a three-line thank-you note, but for her it was better proof than a longer form letter with her name typed in.

Since then I have seen over and over that a simple, handwritten note or typed thank-you letter with a personal note as a postscript can do more to build donor loyalty than almost any other form of recognition. Unfortunately, thank-you notes tend to be the one thing that organizations are sloppy or even thoughtless about. They either don't send them, send them weeks too late, or, now endowed with computers, send form thank yous with the person's name inserted every few lines. These practices are unjustifiable. Sending thank-you notes too easily falls too low on people's work priority lists. They have to be placed at the top.

WHY PEOPLE LIKE THEM

It is not clear to me why people like thank-you notes so much, particularly when there is usually very little content in the note. Probably reasons vary. Like our wealthy, testing donor, some see them as a sign that the group knows what it is doing. Others may just like the attention. While psychologists may be able to figure out why people like to be appreciated, for fundraisers it is enough to know that it is true. Doing what donors like — as long as we stay inside the mission and goals of the organization — builds donor loyalty. A loyal donor is a giving donor, giving more and more every year.

DON'T DO AS I SAY

What about the donor who claims not to want a thank-you note, or the one who even more strongly states that thank-yous are a waste of time and money?

The first type of donor, who claims not to want a thank-you, but doesn't seem emotional about it, should get one anyway. These are generally people who are genuinely trying to save groups time. You will have greater loyalty if you send a thank-you note anyway. When these donors say, "You really shouldn't have done that," or "That's really not necessary," they often mean, "Thank you for taking the time. I can't believe someone would be bothered to notice me."

The second style of donor, who actually resents thank-you notes, probably should be thanked in some way, but without using a thank-you note. Try calling to thank her or him instead of writing. If the person is close to the group, you can combine your call with another function, such as to remind them of a meeting: "I called to remind you about the meeting Wednesday at 7 P.M. at Marge's. By the way, thanks for your gift — we can really use it."

Overall, experience shows that, all else being equal, when you thank donors you keep them and when you don't you lose them. Of course, there will be exceptions to this rule, but it is almost impossible to figure out who really is an exception and who is just pretending to be, so thank everyone and save yourself the time you would have spent worrying about it.

DO IT NOW

How can you most efficiently thank your donors, and who should do it? Perhaps the most important rule about thanking donors is that no matter who is doing it — from the board chair to an office volunteer — gifts should be acknowledged *within two days of receipt*, a week at the outside. If possible, a person who knows the donor should sign the thank-you note.

If you are fundraising properly, you will have dozens of donations coming in from people you don't know. Volunteers and board members can send thank-yous. It is actually a good way to get board members who are resistant to fundraising to do some, because the thank-you note is a part of fundraising.

Buy some nice note cards, or have some made with your logo on the front. Small cards have only a small amount of space on the inside, so you can take up the whole space with a few short sentences. That is much better than a lonely three-line thank you on a full sheet of stationery.

People should come to the office to write the notes; only the most loyal and trustworthy people should ever be

allowed to write the notes at home. It is just too tempting to put them aside at home. Also, information about a person's gift, while not secret, is also not something you want sitting around someone's living room.

The only requirement for handwritten thank-yous is legible handwriting. The format is simple:

Thank you for your gift of \$____. We will put it right to work on (name your program or most recent issue). Gifts like yours are critical to our success, and we thank you very much.

Sincerely,
(Your name)
Board member

If you know the person, follow the same format, but add something more personal: "Hope your cat, Fluffy, has recovered from her spaying." So that the donor can use the thank you as a tax receipt, add, "No goods or services were exchanged for your donation."

It may be that handwriting thank-yous or handwriting all of them is impossible, especially when you get a lot of contributions, such as at year end, and volunteers aren't as available, or after a successful direct-mail appeal when you are swamped for a few days with responses.

Then you go to the next step, which is a word-processed letter. Put this on stationery and make it a little longer. Start the thank you several lines down the page, and use wide margins.

Dear Freda,

Thank you for your gift of \$100. We have put it right to work on our shelter. As it turned out, your gift came at a particularly crucial moment, as our boiler had just given its last gasp. We were able to buy a refitted, good-as-new boiler for cash (saving us \$), which we wouldn't have been able to do without your gift.

I am hoping you will be able to come to our art auction next month. We have the works of some well-known local artists and will be featuring paintings and sculptures by some of the residents of the shelter. I enclose two complimentary tickets.

Again, thank you so much! I look forward to staying in touch.

You will notice that the letter refers to a recent event (the boiler). This gives a sense of immediacy to the gift. If the organization had not used the money for the boiler, they could have still used the story, as follows:

Your gift came the same day our boiler broke for the last time. I would have been really discouraged, but your contribution cheered me up. Fortunately, we were able to get a refitted, good-as-new boiler for much less than a new one would have cost.

The letter also invited the donor to an event. You do

not need to provide free tickets, nor do you need to be having an event. The point is to refer to things happening in your office every day. Give your donors some sense of your daily work. Even things that seem routine to you can be made to sound interesting.

For example:

Dear Ricardo,

We got a pile of mail today — bills, flyers, newsletters, and then, your gift of \$50! Thank you! \$50 goes a long way in this organization, and we are grateful for your support.

I just finished talking to a woman who used our educational flyer with her son. She said she had expected a miracle, and though of course that didn't happen, maybe something more long lasting did. Her son called the HelpLine. It's a start, and that's what we provide for people.

I hope you will feel free to drop by sometime. Though we are usually busy, we can always take a few minutes to say hello and show you around. I'll keep you posted on our progress.

Or,

Dear Annie Mae,

I just came in from an eviction hearing of one of our clients. I feel really good because we won, and we got some damages to boot! Then, going through the mail, I came to your gift of \$25. Thanks! I feel like you are a part of this victory.

Or,

You wouldn't believe how many people came to our community meeting last night — more than 50! People are hopping mad about this incinerator proposal, and I am feeling confident that we may be able to defeat it and finally get the recycling bill passed. Your gift of \$50 is going to go a long way in helping us with flyers and phone calls. Thanks for thinking of us at this time. You don't know what a great morale boost it is to receive gifts from supporters like you.

If you have a matching campaign or a goal for an annual campaign, then include that:

Your gift of \$100 will be matched dollar for dollar. Your gift brought us to just under \$2,000 raised in just two months!

Or,

Your gift of \$75 took us over the \$1,000 mark in our goal of \$3,000. Thanks!

If you are a volunteer, mention that in your thank you:

Giving time to this organization is one of the high points of my week. I know we are making a difference, and I want you to know that your gift helps make that difference too.

THE FRIENDLY FORM LETTER

The least effective option for thank-you notes, but one you sometimes have to resort to, is the form letter. If you use a form letter, acknowledge that it is impersonal, but give some sense of the excitement that would lead you to use such a method.

Thank you for the recent gift. Please excuse the impersonal nature of this thank you — we are no less enthusiastic about your gift for not being able to write to each of our donors. The response to our call for help with sending medical supplies to El Salvador was both gratifying and overwhelming. We will send you a full report about this effort in a few weeks. Right now, we are packing up boxes of supplies — supplies you helped pay for. Thanks again!

CALL THEM WHAT YOU WILL, BUT THANK THEM

There are two common questions remaining about thank yous. One is, how do you address people you don't know? The choices are by first name only, by first and last names (Dear John Smith) or by title (Dear Mr. Smith). There is no clear right or wrong practice on this point and no way to avoid possibly offending someone. In general, you will probably offend the least amount of people by using titles, "Dear Mr." or "Dear Ms." Certainly, you could write to the person according to how they write to you. A letter signed, "Mrs. Alphonse Primavera" should be answered in kind. If there is ambiguity about whether a donor is a man or a woman, write "Dear Friend." If you live in a fairly laid back or not terribly formal place, you can use a first name, "Dear Terry" or "Dear Lynn."

Don't waste a lot of time worrying about this. Having received many thank yous that say, "Dear Mr. Klein," I know how offputting that can be, but it does not cause me to stop giving to that group. Anyone who will stop giving just because you (or anyone else) cannot tell from their name whether they are a male or a female, or whether they prefer to be called by their first name, last name, Mr., Ms., or Mrs. doesn't have much loyalty to your group.

The second question is, do all donors get a thank you? Yes. You have no idea how much a gift of \$25 or \$5 or \$500 means to someone. You need to act as if you would like to get that amount or more again. You also don't know how people use getting a thank-you note to judge whether to continue giving to your organization, as with the donor at the beginning of this article. Why take a chance?

Do all donors get the same thank you? No, because the notes, if possible, are personalized. But people giving bigger gifts don't get bigger thank yous. If you have thousands of donors, you will not be able to write to them all personally, so sort out the ones you know and write to them. But make sure each donor gets something.

Keep up with thank-you notes as gifts come in. Each thank you is a link to the donor and you should see it as paving the way for the next gift.

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