



Successful
Volunteer-Led
Phonathons

SustainAbility

HANDBOOK



**SUCCESSFUL
PHONATHONS
IN
11 EASY STEPS**

**Raise funds by phone:
Plan your event
Train your volunteers
Get great results**



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A volunteer-led phonathon is simple:

Think of it as “*friends calling friends for help.*” We do it all the time—pick up the phone and ask for a favor. What could be more natural? But,

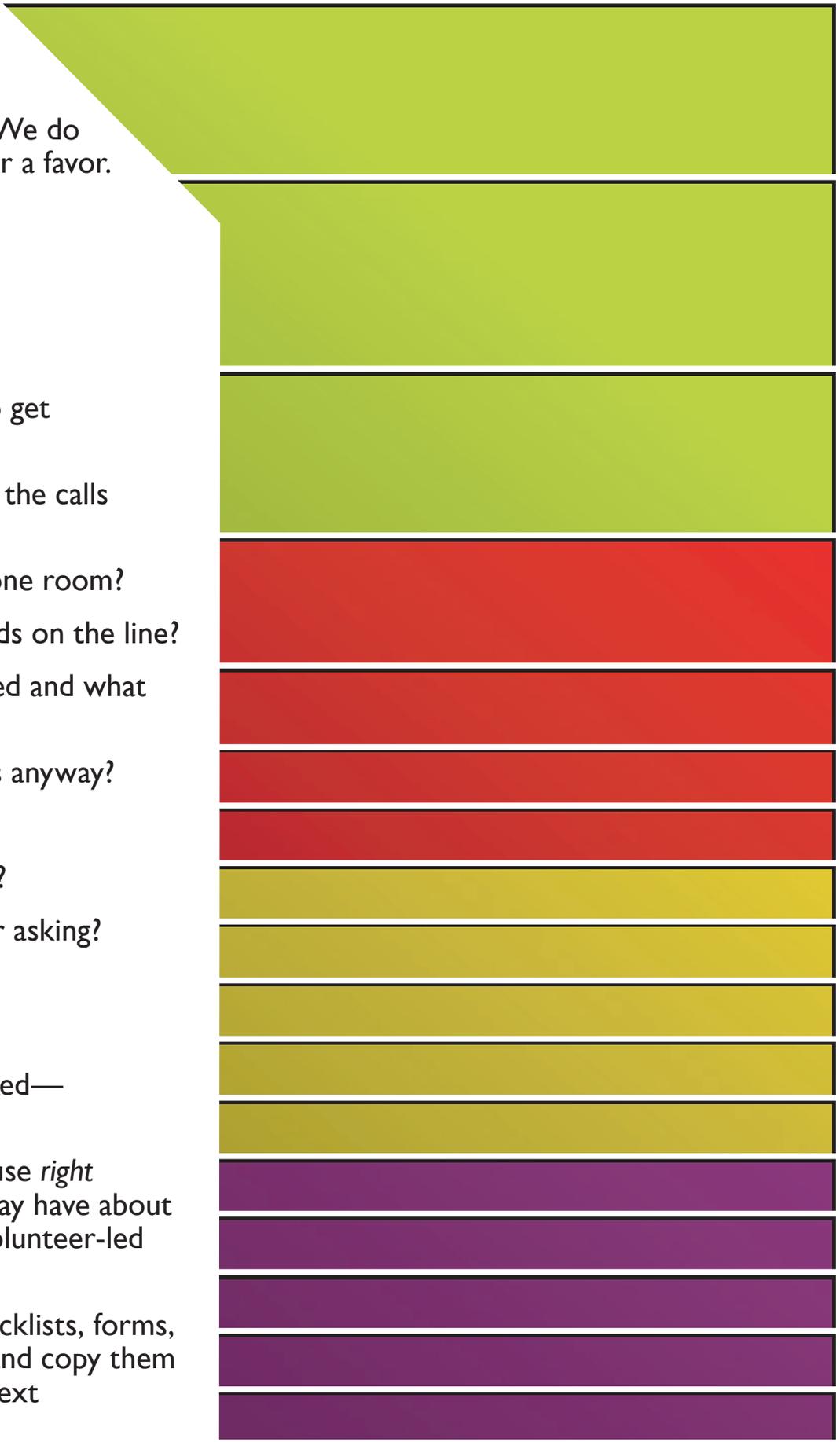
- Who should we call?
- And what are we asking them for?
- How *much* help do we need?
- How many friends do we have to call to get that help?
- How many people do we need to make the calls all in one night?
- Where are there a lot of phones all in one room?
- What will we say once we get our friends on the line?
- How can we keep track of who we called and what they said?
- When’s the best time to call our friends anyway?
- Who’s going to organize all this?
- How can we make it *fun* to ask for help?
- Might some friends be annoyed at us for asking?

Answers to your phonathon questions:

The phone is an excellent—and overlooked—fundraising tool.

This hands-on handbook is designed for use *right now* by answering all the questions you may have about planning and implementing a successful volunteer-led fundraising phonathon.

It comes complete with ready-to-use checklists, forms, samples and other tools, too. Go ahead and copy them to get started. And begin planning your next phonathon today.



STEP ONE

INTEGRATE!

How can a
phonathon help us
raise funds and friends?



ACTIONS!

Integrate with your current annual campaign

Your volunteer-led phonathon is a fundraising special event, so work it into your fundraising cycle in the same way you would any other event: for maximum impact and results. A phonathon is best used to support a campaign you already have in place, especially your annual giving campaign, since it's an ideal “mop-up” tool.

Integrate with important calendars

Timing is critical to the success of your phonathon. It should fit in with your organization's calendar, of course, but also your *volunteers' and donors' calendars* because they're the ones who will make your phonathon a success.

Early spring is good. Holidays, extended weekends and other dates when donors may be unavailable are not. It helps to announce your phonathon on your website and in your newsletters too, to give donors a heads-up for their own calendars.

How can a phonathon help us raise funds and friends?

• Integrate with your philosophy

If your board members, staff or volunteers resist the idea of a phonathon for “telemarketing” reasons, assure them that your phonathon will *enhance* your organization and its mission.

That’s because your volunteer callers will:

- Perform in a professional manner (you’ll train them)
- Treat your donors as valued friends
- Thank your donors graciously for their past support
- Call only during acceptable times
- Always ask permission to start the “dialogue.”





CONSIDER THIS...



Need more good reasons to have a phonathon?

Copy and distribute the “25 Benefits: Phonathons Raise Funds and More” fact sheet to your board members, staff, volunteer leadership and stakeholders. They’ll soon agree that a volunteer-led fundraising phonathon is worth the time and effort.



Tools:

Use the following
Tools to help you achieve your
Successful Volunteer-led Phonathon:

- ▶ 25 Benefits: Phonathons Raise Funds and More

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25 Benefits: Phonathons Raise Funds and More (p.1)

Expect positive results—you'll likely get even more than you anticipate!

Fundraising. Your initiative...

- 1) ... enjoys the short-term benefits of a fully integrated Annual Campaign.
- 2) ... makes the best possible use of your direct mail campaign investment.
- 3) ... puts to use one of the best tools for upgrading your current donors.
- 4) ... puts to use one of the best tools for reinstating recently-lapsed donors.
- 5) ... enjoys the long-term benefits of strengthened relationships between your staff and volunteers.
- 6) ... enjoys the long-term benefits of strengthened relationships among your volunteers.
- 7) ... provides your donors with a more personal asking approach that can significantly boost response to your mail campaign.
- 8) ... creates opportunities to appeal for activism or other kinds of support.
- 9) ... gathers and updates donor information.

Volunteer Development. Your volunteers...

- 10) ... become engaged with your organization in a new and interesting way.
- 11) ... learn more about your program's history and mission, and become comfortable telling your organization's story.



COPY ME

25 Benefits: Phonathons Raise Funds and More (p.2)

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- 12) ... get to personally reach out and touch large numbers of other people (donors) who care about your organization.
- 13) ... get to share information about your organization that your donors may not know.
- 14) ... learn from your donors, too.
- 15) ... develop stronger relationships with one another.
- 16) ... become more committed to your organization and better donors themselves.
- 17) ... get to have a fun and enjoyable evening filled with camaraderie.

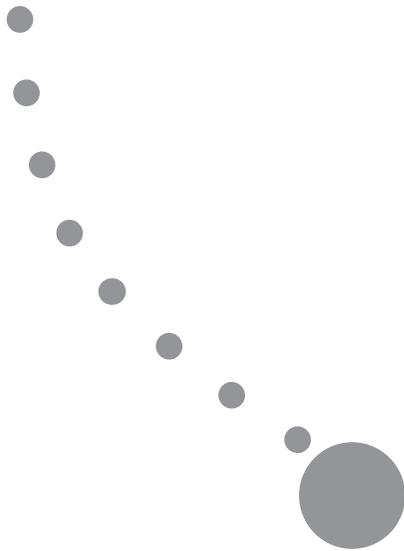
Donor Development. **Your donors...**

- 18) ... get to speak personally to a representative from your organization.
- 19) ... can ask questions about your programs.
- 20) ... can offer valuable feedback about their impressions of your organization.
- 21) ... develop a better understanding and appreciation of how their gifts are used—which encourages them to give more.
- 22) ... feel appreciated, because the volunteer caller tells them they are.
- 23) ...develop a better understanding of their importance to your organization.
- 24) ... increase their level of involvement because of the personal contact and appreciation.
- 25) ... reinstate their involvement if their commitment has lapsed.





Review the Step



Ready for the
Next Step?

STEP ONE

Overview:

ACTIONS!

- ✿ Integrate with your current annual campaign
- ✿ Integrate with important calendars
- ✿ Integrate with your philosophy

CONSIDER THIS...

- ✿ Need more good reasons to have a phonathon?

TOOLS

- ▶ 25 Benefits: Phonathons Raise Funds and More



1 STEP ONE