

STEP FOUR

RECRUIT LEADERSHIP and CALLERS

Who will make the calls?
Who will help them succeed?



ACTIONS!

Phonathon leadership

You need a core group of board members, staff and volunteers to form a committee—then plan, organize and coordinate your phonathon effort. Committee members should be energetic, enthusiastic, reliable and of course, committed to the phonathon goal. They'll need to:

- Attend pre-phonathon planning meetings
- Help secure a site
- Recruit volunteer callers
- Solicit donations for food and awards
- Attend and participate in the phonathon
- Contribute financially to the fundraising effort

Use the “Team Building Worksheet” to keep track of who’s doing what.

Who will make the calls? Who will help them succeed?

Phonathon team members

Volunteer Chairperson/Team Leader: Lends his or her name to the effort and helps engage and motivate volunteer callers.

Volunteer Callers: Call and ask (and thank) prospects, fill out pledge forms and update donor information on calling card.

Answer Person: Usually a long-term or senior staff person who is ready and able to answer prospect/supporter in-depth questions.

Cheerleaders: Keep spirits high by keeping callers motivated, refreshed and happy!

Runners: Organize completed pledge forms into piles, including: completed/ready for mailing, no answer—sorry I missed you, call back, refused and bad number.

Phone Number Checker: Quickly checks computer records, phone books, directory assistance or internet directories for erroneous numbers that “slip through.”

Tally Keeper: Records progress of goals on a large visible board or other visual device, like a thermometer.

Mailer/Processor: Separates pledge forms for mailing, runs credit card forms, and mails at the conclusion of the evening (or the following day).

🌟 **Overcoming volunteer apprehensions**

Not every volunteer you contact will jump at the chance to call people they don't know. To help them along, focus on the reason you're having the phonathon and mention any respected peers that are participating. Also make sure they know they'll be given *everything* they need to be successful, including training.





CONSIDER THIS...

SUCCESS STRATEGY: **Calling Teams**

Consider creating calling “teams” to motivate your volunteer callers and build camaraderie. Get creative with the team names. Seat the team members next to each other. Keep track of team progress on your tally board. This strategy may also help with your volunteer recruiting efforts—volunteers can nominate their friends to join their team.



Tools:

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

▶ [Team Building Worksheet](#)

A winning team is made up of staff, leadership volunteers, volunteers with specific roles and volunteer callers. When everyone understands their unique roles and works together, your volunteer-led phonathon will be successful and enjoyable.

Use the following worksheet to identify your leaders and team members. And remember to schedule at least 25% more volunteer callers than you actually need to allow for illness, personal emergencies and other scheduling conflicts that may come up.

ROLE	TEAM MEMBER
Volunteer Chairperson	
Phonathon Committee	
Cheerleader	
Tally Keeper	
Runners	
Mailer/Processor	
Answer Person	
Phone Number Checker	
Volunteer Callers	



STEP FOUR

Overview:

ACTIONS!

- Phonathon leadership
- Phonathon team members
- Overcoming volunteer apprehensions

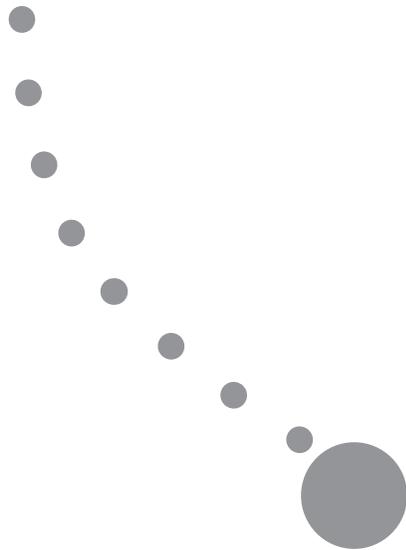
CONSIDER THIS...

- SUCCESS STRATEGY:**
Calling Teams

TOOLS

- Team Building Worksheet

Review the Step



Ready for the
Next Step?



4 STEP FOUR