



ENGAGING YOUR BOARD, CEO AND VOLUNTEERS
IN DEVELOPMENT

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Session Overview

1. Our task – Fundraising; Our Collateral – CEO, Board and Volunteers
2. Our role – “Managing Up”
3. Review volunteer motivations, trends and impact
4. Discuss how to effectively manage the effort and ensure a great experience
5. Your volunteer engagement plan

What works?

“Ask for money, get advice.

***Ask for advice, get money
twice.”***

Pitbull (featuring Christina Aguilera), Feel This Moment

(Watch the video. You know you want to.)

The Five-Tool Fundraiser

- Effective Solicitor. This person is mission driven and passionate, with strong institutional knowledge and fundraising DNA.
- Effective Staff Manager. This person hires the best, minimizes turnover and is driven to help staff succeed.
- Effective Strategist. This individual is always looking ahead, takes the initiative, is a big-tenter and navigates around politics, keeping drama to a minimum.
- **Effective Manager of CEO and Executive Team. This is a teacher and mentor, a senior member of the leadership team who develops tools and resources.**
- **Effective Board/Volunteer Manager. This one gets the best from people who are committed to the mission.**

The Board

Legal/Fiduciary

- Maintain legal and financial integrity
- Oversee financial resources
- Establish policies, bylaws and organizational priorities

Hire/fire the CEO/President

Governance

- Nominate and elect new members to the Board
- Identify leaders for committees and volunteer activities
- Seek a unified, well-balanced Board that is representative of all constituents

Leadership

- Ensure effective strategic planning
- Support the organization's direction and the programs

Fundraising

- Make an annual gift
- Identify, cultivate and solicit donors
- Promote giving and event attendance
- Enhance the image of the organization

The CEO

- What do we want from them?
 - Vision and inspiration – they are the chief evangelist
 - Transparency - they give us the information we need
 - Attention – they follow our plans and briefing materials
 - Resources – we must have the required resources to fulfill our goals
- What do they want from us?
 - The same things volunteers want...
 - **They report to the Board. We report to them.**
 - **But, in matters of fundraising, they look to us to lead, manage the strategy, and execute the plan.**

What is Board/CEO/Volunteer Engagement?

**Takes different forms –
ambassador, solicitor,
advisor**



**Not a one-time role;
creating a deep
connection**



Not static; a process



Top down and inside out



**Effectively
employing the
assistance of unpaid
talent to support
various dimensions
of your
development
operation**



Why is a Strong Volunteer Engagement Plan Important?

Drives Giving

Develops
Leadership

Cultivates and
Stewards Donors

Promotes
Advocacy

Expands
Development
Function

Aids in
Operational
Efforts

Types of Volunteer Roles

Board of Trustees/Directors

Advisory Boards

Campaign Committees

Task Forces

Alumni Groups

Coaching/ Mentoring

Seasonal Roles

Pro-bono Consulting

Virtual Volunteering

Young Professionals Groups

Operational Support

Event Committees



ENGAGING VOLUNTEERS IN DEVELOPMENT

IMPACT, MOTIVATION, AND TRENDS

Impact of Volunteer Engagement

Cultivates and Builds Stronger Relationships with Volunteers and Donors

Drives Giving

Develops Dynamic Leaders

Promotes Advocacy

Expands development capacity and operations

What Motivates a Volunteer?

- **They were asked!**
- **Affinity or attachment to organization**
 - Family/friend/business connection
- **Affiliation with a cause**
 - Desire to make a difference
 - Commitment to the mission
- **External affiliation-relation incentives**
 - Meet others/be part of a team
 - Fulfill service or membership requirements

Volunteer Trends

- **Volunteers are selective**
- **Volunteers are protective of their time**
- **Volunteering is habit forming**
- **Volunteerism increases with age and income**
- **Women volunteer at a higher rate than men**
- **Volunteers volunteer often**
- **Volunteers give and they give MORE**



Volunteers as Donors

87% of volunteers say they give to the same charity at which they volunteer¹

50% of volunteers say they give more because they volunteer¹

In Massachusetts, between **60-70%** of gifts given by residents are directed within the state²

The majority of organizations met their fundraising goal when their board members helped with fundraising³

Wealthy donors who volunteer give **73%** more on average when compared to those who do not volunteer⁴

1. "Time and Money: The Role of Volunteering in Philanthropy", Fidelity Charitable Report, 2014
2. "2015 Giving Report," Fidelity Charitable, 2015
3. "Special Report Engaging Board Members in Fundraising," Nonprofit Research Collaborative, 2012
4. 2014 U.S. Trust Study of High Net Work Philanthropy



ENGAGING VOLUNTEERS IN DEVELOPMENT

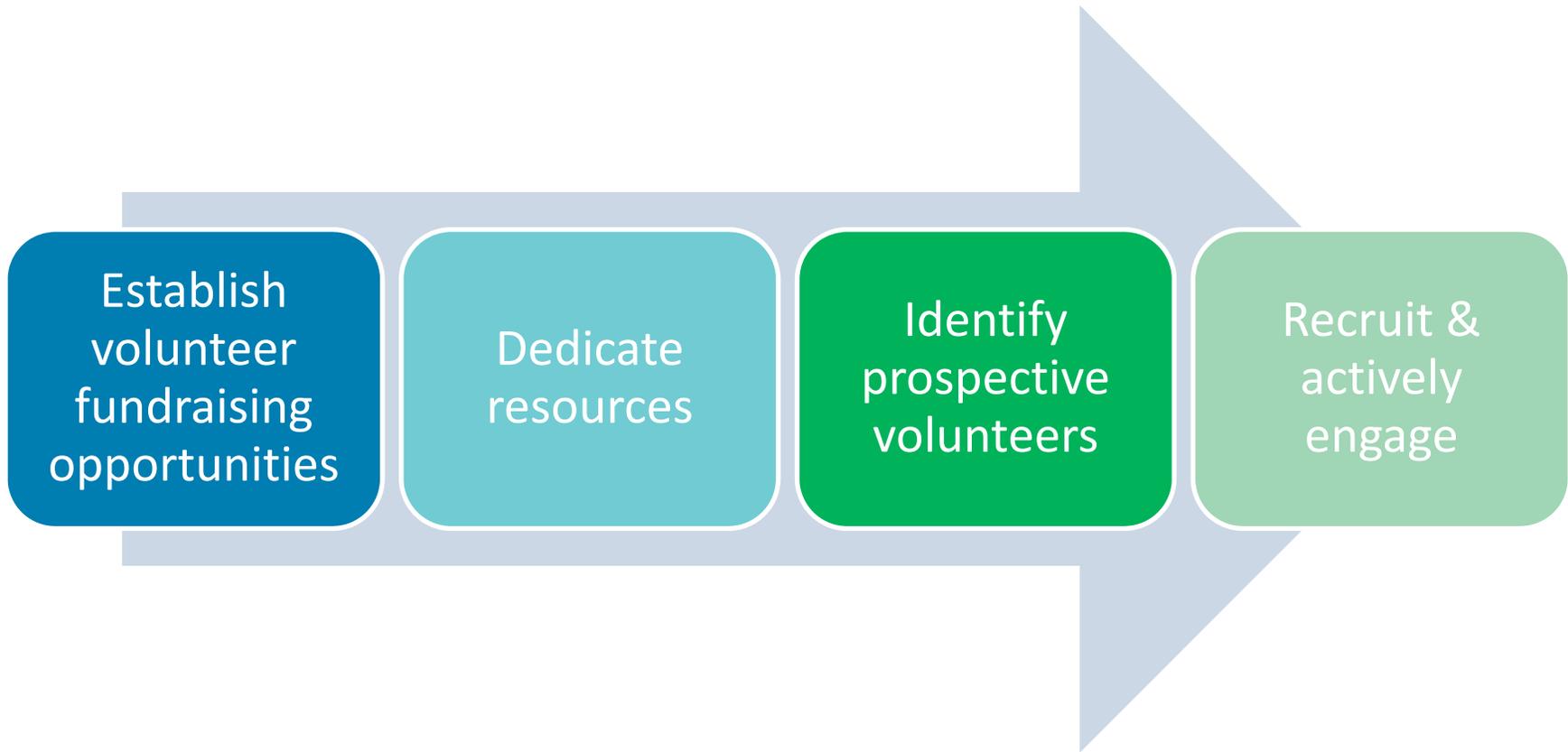
VOLUNTEER ENGAGEMENT PROCESS

CEO/Volunteer Engagement Poll

When you think about CEO/Volunteer Engagement in Fundraising at your organization, how would you rate your current program?

- **Strong** – CEO and volunteers work their portfolios, regularly make asks and are setting records each year for dollars raised
- **Average** – CEO and volunteers make asks, set meetings and host events, but more is needed to secure the best gifts possible from prospects
- **Fair** – CEO and volunteers sometimes make asks, review lists and attend/host events, but the payoff for staff effort is low
- **Help!** – CEO and volunteers think it is the Development/Advancement department's job to raise money and are not engaged

Engagement Process



Establish Opportunities

Give a Gift

Identify Prospects

**Recruit Additional
Volunteers**

Cultivation

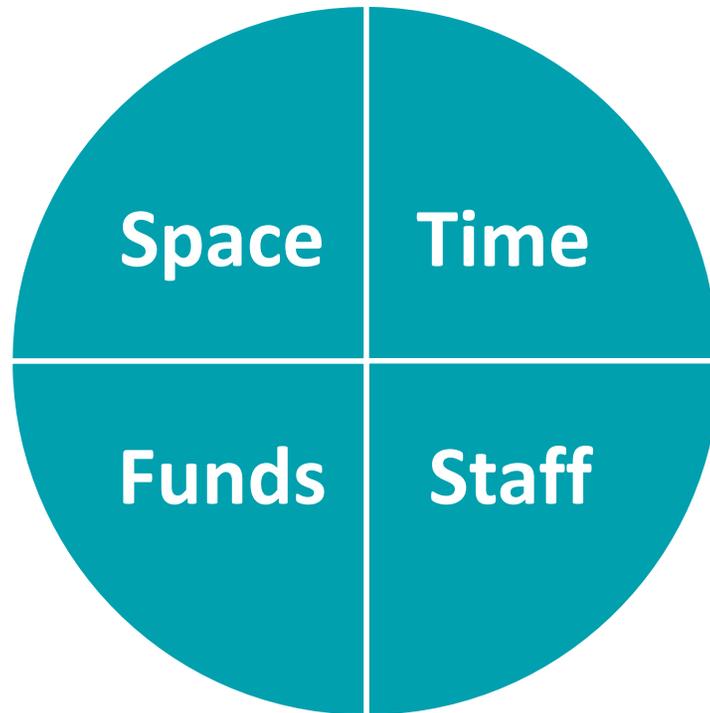
Ask for Gifts

Steward Donors

Host Events

Dedicate Resources

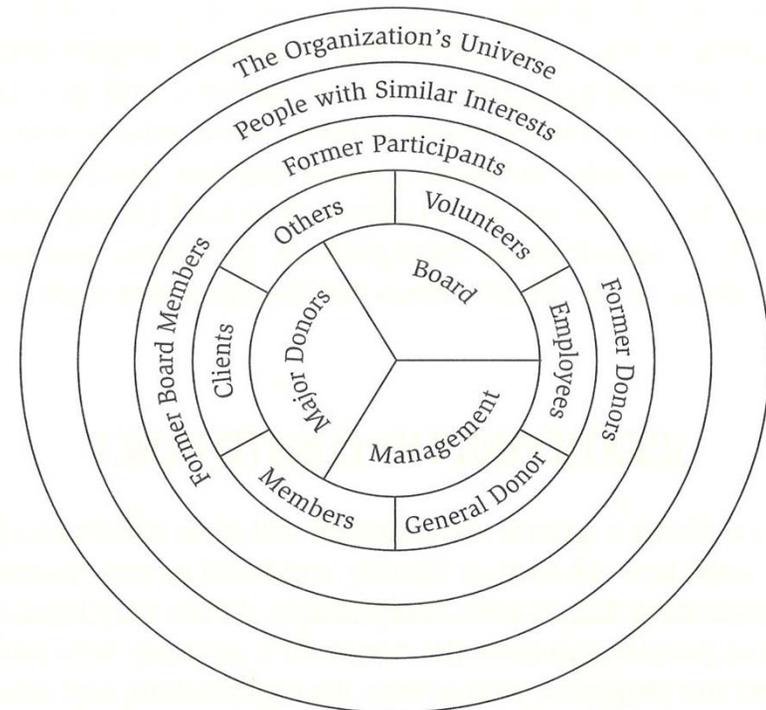
Maximize your volunteer investment by providing your program with adequate:



Identify Prospective Volunteers

- **Define the need for and role of your fundraising volunteers**
 - Include a section on volunteers in your fundraising plan
 - Know what you want them to do, and why you *need* them
- **Understand the type of person you need for the project(s)**
 - Conduct volunteer prospecting meetings with staff and current volunteers
 - Look for demonstrated financial commitment

The Constituency Model



Source: *Achieving Excellence in Fund Raising* – Hank Rosso

Find the Right Volunteer

Strong Volunteer

- Donor
- Champion
- Commitment
- Follow-through
- Desire
- Capacity to grow

Weak Volunteer

- Tentative
- Non-donor
- Unreliable
- Incomplete effort
- Reticence
- Unwilling to adapt

Recruit & Engage Volunteers

Demonstrate the need

- Describe project, the timeframe and support available

Involve in Activity

- Introduce the volunteer as the solution
- Make meaningful assignments
- Provide ongoing support and training

Develop the Relationship

- Jointly review and assess impact
- Utilize prospect cultivation and stewardship techniques
- Partner leaders together on single effort

Articulate the opportunity

Be personal

Be specific

Be creative

Volunteer Management Tools

- Recruitment
 - Invitations, handbooks, best practices
- Orientation and Training
 - Tools for success
- Management
 - Guidance
 - Providing volunteers with the resources they need
- Communication and Stewardship
 - Stay in contact!
 - Thank and appreciate these people – they are the key to success

Volunteer/CEO and Staff Working Together

Possible Roles	Volunteer/CEO	Staff
Discover	<ul style="list-style-type: none"> Provide names Review names Scan foundations for contacts Strategy sessions with staff 	<ul style="list-style-type: none"> Research and circulate Share new donors Track and manage information
Cultivate	<ul style="list-style-type: none"> Host an event Set up a meeting, coffee Accompany staff for a meeting 	<ul style="list-style-type: none"> Brief Volunteer/CEO Plan/attend event Provide background materials Execute follow up
Solicit	<ul style="list-style-type: none"> Accompany Share your story “Join me” 	<ul style="list-style-type: none"> Prepare materials Brief Volunteer/CEO Practice solicitation Execute follow-up
Steward	<ul style="list-style-type: none"> Stay engaged with new donor Send personal thank you Thank you calls 	<ul style="list-style-type: none"> Send mailings and updates Provide assignments Think about next ask

Supporting Volunteers/Board/CEO – Our Role

- Background research – family, education, philanthropy, wealth indicators
- Manage comprehensive moves management strategy for each prospect
- Action memos detailing assignments
- Personal follow-up reminders
- Scheduling and logistics
- Briefings, talking points, and proposals
- One-on-one preparation



Common Pitfalls

- **Weak or no volunteer plan**
- **Wrong volunteers in the wrong role**
- **Great volunteer in the wrong role**
- **Low activity**
- **Limited communication**
- **Lack of energy in their atmosphere**
- **Lack of support for the volunteer corps**
- **Not enough thanks and appreciation**



Summary

- 1. Volunteer engagement in fundraising is pivotal to success**
- 2. Must be an institutional priority**
- 3. Approach this function systematically, with a plan**
- 4. Be prepared to adjust**
- 5. Understand the impact and outcomes of great volunteers**
- 6. Avoid the pitfalls of getting mired in minutiae**

Q and A

Your burning questions answered here!

- **Any questions not addressed live due to time can be answered via email by sending me an email at kvilla@ccsfundraising.com**

Additional Online Resources

- [Kay Sprinkel Grace: AAA Volunteers](#)
- [501 Commons: Volunteer Orientation and Training](#)
- [Idealist.org:Developing Your Volunteer Program](#)
- [Serviceleader.org: Creating a Volunteer Handbook](#)
- [Kalamazoo Valley Habitat for Humanity: Volunteer Handbook and Policy Manual](#)
- [University of Virginia Reunion Giving: Volunteer Training Manual \(2013-2014\)](#)
- [Community Tool Box: Developing Training Programs for Volunteers](#)

Practicum

- **Name one fundraising action a volunteer can do to help you now.**
- **How will it impact the organization?**
- **What type of person would be best suited for this task?**
- **What resources would your organization provide?**
- **What level of support would the volunteer receive?**
- **How would you recognize the volunteer's efforts?**

Start Your Work Plan

What are the three action steps and/or goals you can use to build a stronger volunteer program at your organization?