



From Volunteer to Lead Donor: Creative Ways to Engage Prospects

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AFP New Jersey Annual Conference on Philanthropy

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About CCS



Leading fundraising consulting and management firm



Worked in 5k cities around the world



Largest and most experienced permanent staff



Varied and flexible client engagements

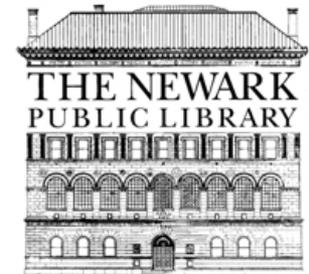


Clients are among the most recognizable brands in philanthropy nationally and internationally



New York – Chicago
San Francisco – Los Angeles
Philadelphia – Toronto
Baltimore – Washington
St. Louis – Dallas – Seattle
Boston – London – Dublin

Our Experience



Session Objectives

Understand the importance of **high-level volunteer engagement** in philanthropy



Understand the **lifecycle of cultivating volunteers into lead donors** and your organization's champions



Learn about different **engagement activities** through **case studies**



Return to your organization with **new ways to engage volunteers in philanthropy** as part of your overall fundraising plan

Session Outline

- I. Today's Volunteers
- II. Case Study: Denver Academy
- III. Case Study: Newark Public Library
- IV. Case Study: NJ Symphony Orchestra
- V. Case Study: Rowland Hall
- VI. Case Study: March of Dimes
- VII. Case Study: Columbia University
- VIII. Reflection & Takeaways

Section I

Today's Volunteers

Why People Volunteer

76% say they feel healthier

94% say their quality of life improved

78% say their stress levels are lower

80% say they have more control over their health

94% say their mood improved

95% say they're helping improve their community

96% say their lives are enriched with greater purpose

81% say they've strengthened relationships with colleagues

Volunteerism and High Net Worth Individuals

According to a recent survey, nearly **50%** of HNWI's volunteered—**twice the rate** of the general population (25%).



HNWIs' top two ways to have the greatest impact on society



Charitable giving



Volunteering

Volunteerism and High Net Worth Individuals



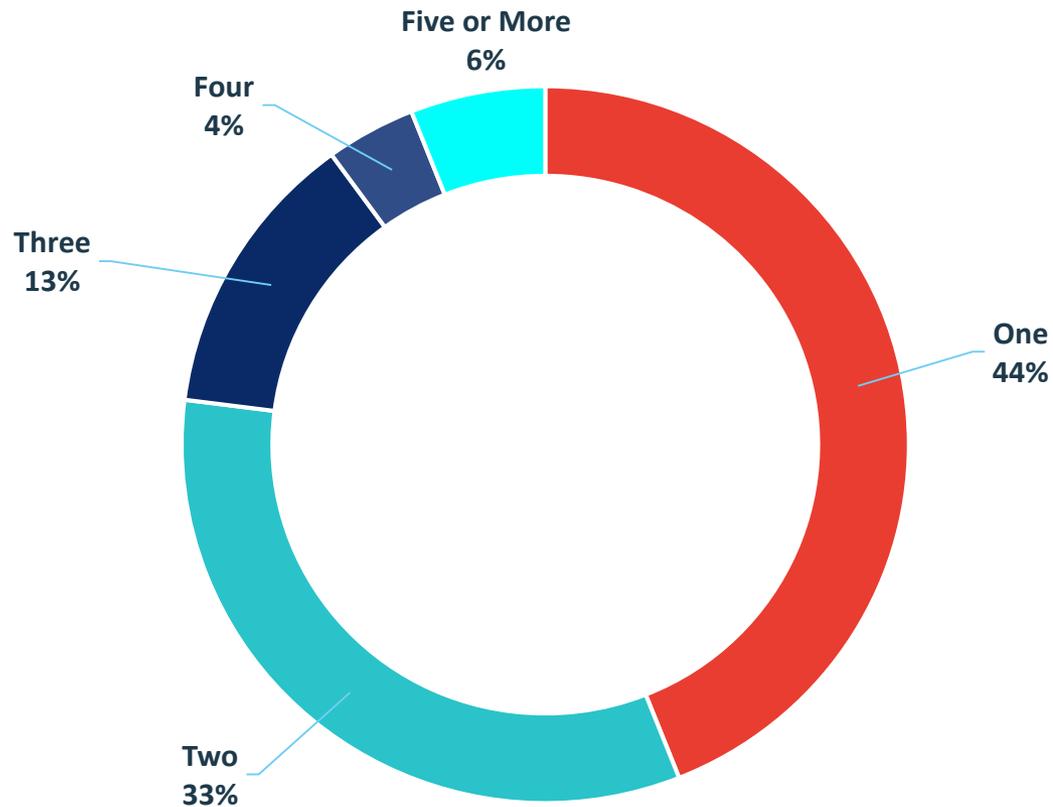
On average, donors who volunteered also gave **56% more** than those who did not.

Average Gift Amounts



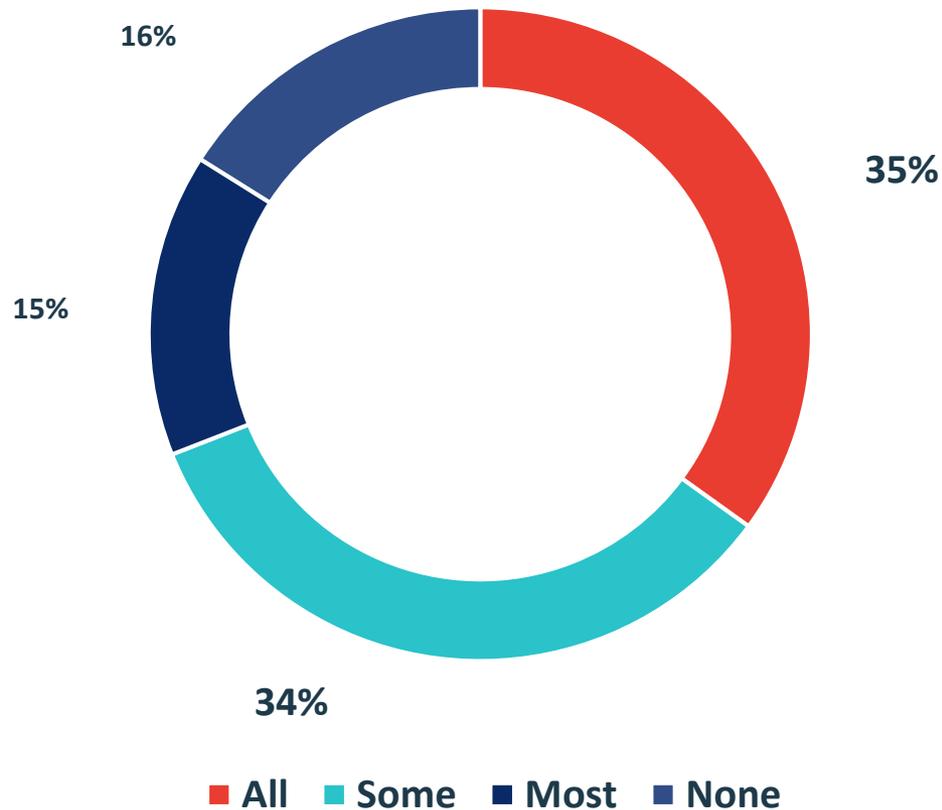
Volunteerism and High Net Worth Individuals

“I volunteered with ___ organizations in 2015.”



Volunteerism and High Net Worth Individuals

What share of the organizations that you volunteer for do you also support financially?



Just Ask!

"Thinking about the organization for which you volunteered the most hours this past year, how did you become a volunteer at the organization?"



Invest in Volunteers – Rethinking the Paradigm

Seasonal roles

Substitute
roles

Team
volunteering

Virtual
volunteering

Serving as a
pro bono
consultant

Coaching /
mentoring

Task force

Managing Volunteer Leaders



Section II

Case Study: Denver Academy



Denver Academy

Denver, CO

Organization Overview

- 44 years – focuses on the “way you learn best”
- 370 students
- 2/3 of students come from a public school
- Previous campaign of \$5M

CCS Engagement

- \$15M-\$20M working goal
- Build a new Athletic Facility
- Build a new Performing Arts Center
- Renovate Elementary Building
- Grow Endowment Fund

Volunteers

- Campaign Cabinet
- Campaign Honorary Cabinet
- Champions’ Circle
- Engaged Board

Case Statement | Gallery Walk

Who can use it?

- Everyone!

Intended Result for Volunteer

- Up-to-speed and invested in case and messaging
- Engaging/fun way to provide input
- Opportunity to get to know other volunteers
- Excited about being a part of this

Intended Result for Organization

- Efficient feedback on materials
- Understand areas cabinet members are most passionate about
- Set tone for cabinet

**BUILDING ON
EXCELLENCE**



Gallery Walk

Materials

- Poster-size copies of materials you want feedback on
- Clipboards, highlighters, pens and post it notes, tape
- Summary sheets that focus people in on areas you want feedback on

Process

- Prep room making sure you have sufficient wall space
- 5 mins – description and purpose of activity
- 20 mins – focus on content
- 10 mins – focus on visuals (pictures, graphs, layout, quotes)
- 15 mins – discussion (2 things you love, 2 things that should be changed)

Considerations

- Need to have a solid draft ready to present (this should be a near final copy)
- You may receive contradicting feedback – need to manage expectations ahead of time
- Think through how you are going to consolidate and organize information (Master Copy)
- Do you have volunteers who need to be sitting (i.e., provide “desk copies,” etc.)?
- How will you communicate back with group before the final product?

Section III

Case Study: Newark Public Library



Newark Public Library

Newark, NJ

Organization Overview

- Unique opportunity to leverage a bequest of a personal library from a major donor, which motivated other prospects to get involved

CCS Engagement

- Feasibility study
- Campaign planning and on-site management
- Strategic planning and consultation

Volunteers

- Engaged board
- Planning Study Advisory Committee
- Campaign Committee

Host Cultivation Dinners

Helpful at Two Points in Process

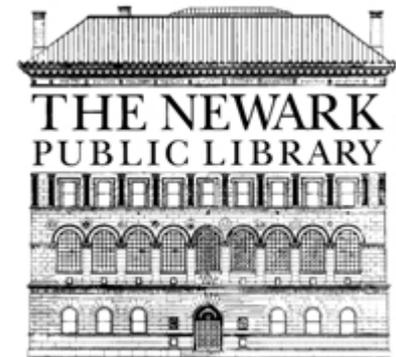
- Planning Phase and/or Active Fundraising Phase
- Timing depends on the culture of philanthropy at your institution
- CEO must be able to effectively articulate her/his vision for the future
- Goal of dinners in planning process: feedback
- Goal of dinners during active campaign: engage, raise sights, and invite

Process for Dinners *During* Campaign

- Determine list of desired hosts (either those who have supported campaign recently or those whom you are cultivating for a major gift)
- Develop list of invitees (pre-screened potential donors) and assign families to each hosts' list, and have a "B" list ready
- Meet with each host at their home in advance and share outline of expectations and responsibilities for dinner, timeline of dinner party, list of potential invitees and catering menu
- Send personalized email invitations 4 to 5 weeks in advance and follow up with each one within a week. Send reminders with parking instructions 2 days prior
- Development representative works directly with caterer, rental service, etc. to ensure consistency and ease of responsibility on hosts' behalf

Considerations

- Begin the invitation process in plenty of time to allow for declines and have “B” list ready; offer alternate dates if scheduling is a challenge
- CEO should have full profiles on each attendee in advance, with photos if possible
- Stick to the schedule for dinner; let everyone know the event begins and ends on time
- Need one development representative to start and end conversation, connect with caterer, thank host and take notes on comments, feedback from guests
- Share with all guests at the end of the dinner that they will be receiving a personal invitation for a tour/visit
- Email personalized thank you notes to each couple
- Schedule onsite tours *immediately* following emails



Section IV

Case Study: New Jersey Symphony Orchestra



New Jersey Symphony Orchestra

Newark, NJ

Organization Overview

- NJ's premiere performing arts organization
- 100+ full orchestra concerts across the state this year, with reach into most counties and even into New York and Pennsylvania
- Critically acclaimed performances, education partnerships, and superb musicians

CCS Engagement

- Feasibility study
- Strategic planning & consultation
- Campaign planning and onsite management

Volunteers

- Engaged Board

Activity | Study Advisory Committee

Who can use it?

- Organizations with new and experienced volunteers
- Organizations who have a specific project or goal they want to test and get feedback on from their community
- Organizations with limited staff
- Everyone!

Who

- 12 – 15 members
- Several major gifts prospects and community leaders

What

- Background statement
- Study interviews
- Report review

How

- Case feedback
- Pilot interviews
- Provide feedback on report and plan

Intended Result for Volunteer and Organization

- Impact the organization in a low-pressure and finite time period
- Generate early buzz and confidence in the campaign
- Create early advocates for the campaign
- Gain feedback on project from lead prospects
- Continued volunteer engagement, potentially for the campaign
- “Seek advice, get money twice”

Section V

Case Study: Rowland Hall



Rowland Hall

Salt Lake City, UT

Organization Overview

- Intermountain West's first, and finest, independent school

CCS Engagement

- Campaign planning study, Fall 2015
- Campaign implementation to bring the school one step closer to uniting on one campus

Volunteers

- High level of engagement
- Mixed experience in fundraising
- Board members

Activity | Round Robin

Who can use it?

- Everyone!
- Organizations whose volunteers vary between new and experienced
- Works well for organizations who have a larger group of volunteers

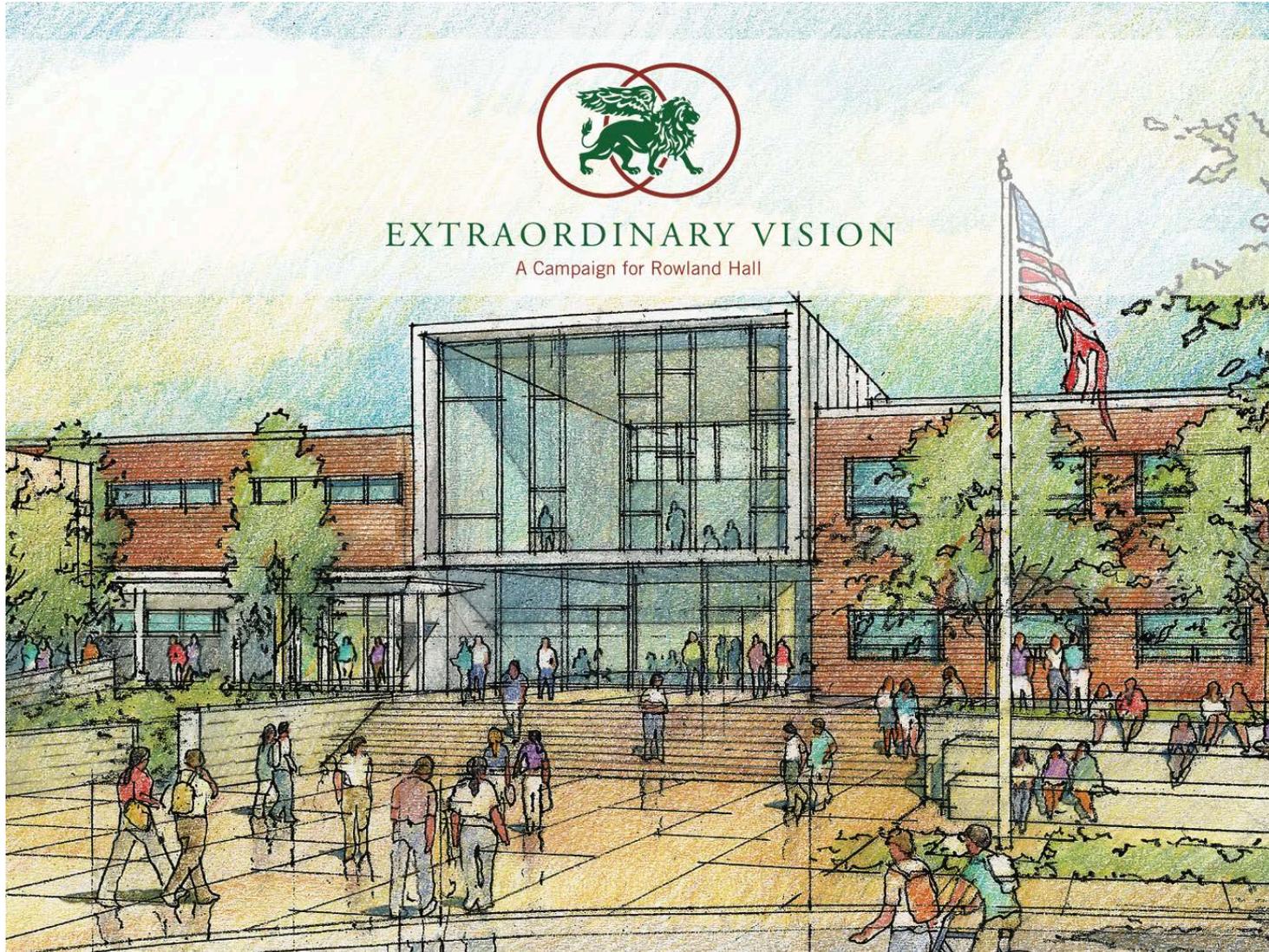
Intended Result for Volunteer

- Impact the organization in a meaningful way in a short period of time

Intended Result for Organization

- “Seek advice, get money twice”
- Strengthen materials
- Learn specific ways volunteers want to be involved

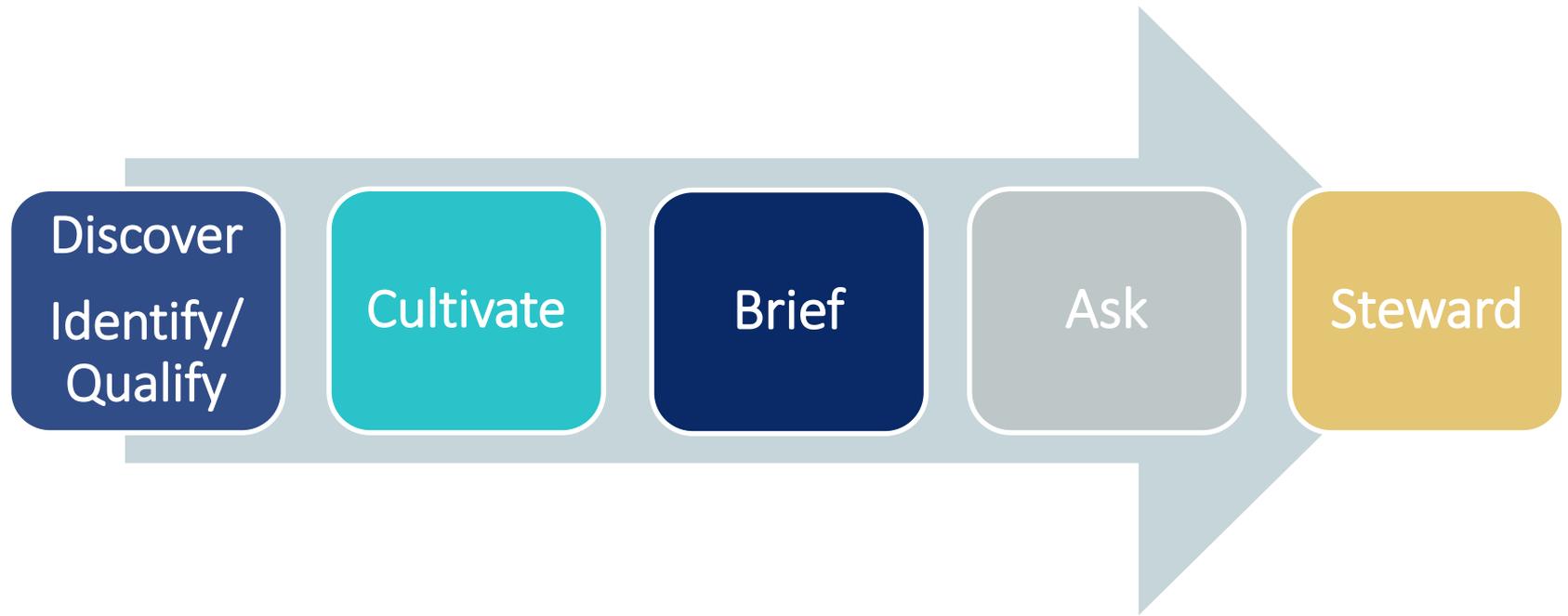
Station 1 | Case Statement Review



Station 2 | Why do you give?

- Reflect on past contributions to Rowland Hall and other organizations
- What inspired your gift?
- Why did you give?
- Was the method of giving important (monetary, other assets, planned gift)?
- Was who asked for the contribution important?
- What could the organization have done differently to increase your giving?
- What could the solicitor have done differently to increase your giving?
- Facilitator:
 - Summarized responses
 - Showed how they related to trends in philanthropy
 - How they will impact the campaign at Rowland Hall

Station 3 | Campaign Pipeline and Case Study



Station 4 | Your Role and Opening Doors

- I am willing to:
 - Host an event for the campaign
 - Attend campus tours with potential donors
 - Make introductions to potential donors
 - Lead solicitation conversations with potential donors
 - Participate in solicitation meetings with another volunteer
 - Other:
- Three great potential donors for the campaign that I can help you with are:
 - 1. _____
 - 2. _____
 - 3. _____
- We would like to engage the following people as potential donors. Do you know any of them or know who is a good connector?

Section VI

Case Study: March of Dimes



March of Dimes

National

Organization Overview

- 15 million born prematurely yearly, globally
- Average medical cost: healthy baby: \$4,389; premature baby: \$54,194
- MOD is funding hundreds of scientists to find the causes and help end premature birth
- Community programs, advocacy, and education

CCS Engagement

- Project goal: design individual giving platform to be launched with national major gifts campaign

Volunteers

- One national and dozens of local chapter fundraising committees
- New to individual giving fundraising as opposed to corporate, sponsorship, event-based, direct mail-based (with few exceptions)



Activity | Prospecting

Who can use it?

- Everyone! Organizations whose volunteers are new or seasoned
- Eases volunteers into more involved activities
- Personalizes engagement for better results

Intended Result for Volunteer

- Jog memory of rolodex
- Design engagement strategies that feel comfortable
- Build trust with fundraising team

Intended Result for Organization

- Identify new prospective donors
- Increase volunteer engagement
- Map plans for engaging prospective donors

Prospecting | Theory to Action

How to Prepare:

- List of current prospects
- List of potential new links identified via your research (and “Who Knows Whom” exercise)
 - Think: areas of influence, education, career, neighborhood, associations, religion

How to Guide Conversation:

- Highlight your expectations and his/her role as volunteer through statement of gratitude: *“We could not do this without volunteers like you who so generously open up their networks and focus their talent to bring new, major donors to our universe in order to End Premature Birth.”*
- State desired results: ID new prospective donors and set engagement strategy
- Review current prospects and stage of engagement as a refresh and baseline
- Present new potential contacts – brainstorm access points and motivators line by line
- Agree upon four engagement strategies: one-on-ones, salon, site visits, public endorsement

Follow up:

- Summarize meeting with next steps itemized
- Include draft language for outreach

Section VII

Case Study: Columbia University School of Nursing

Columbia University School of Nursing

New York City



Organization Overview

- Founded in 1892
- The School of Nursing was the only school at Columbia Medical Center without its own building

CCS Engagement

- Study and campaign management
- Over \$8 million raised

Volunteers

- Campaign Cabinet
- Board of Visitors



Activity | Essentials of Philanthropy

Who can use it?

- Everyone!
- Approachable way for volunteers to learn more about fundraising and solicitations

Intended Result for Volunteer

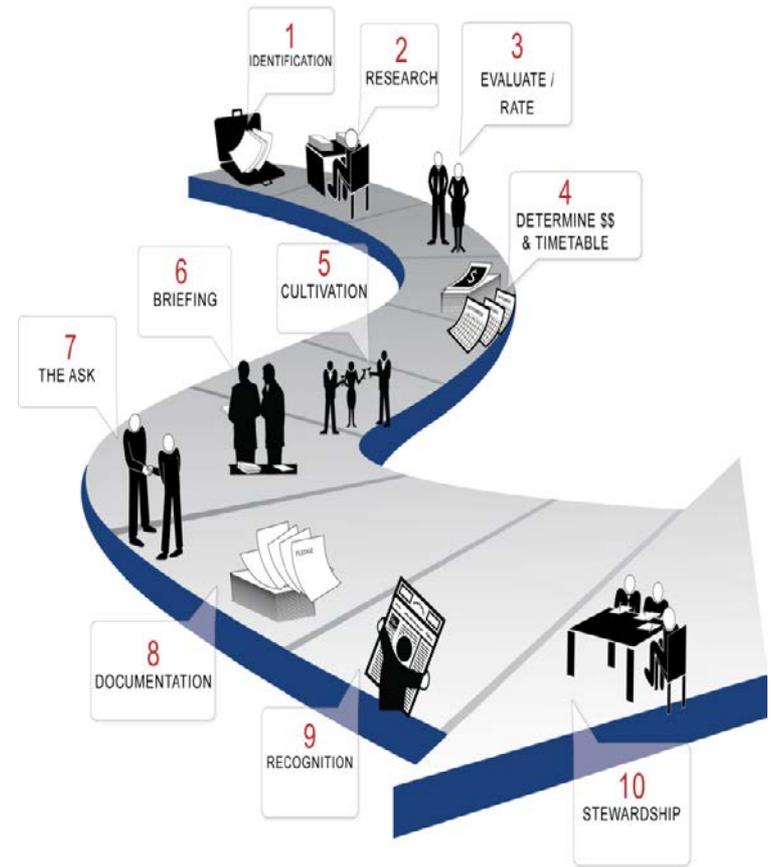
- Enhanced fundraising fluency
- Increased confidence

Intended Result for Organization

- Increased volunteer engagement
- More volunteers willing to be involved in Moves Management[©] process

Essentials of Philanthropy

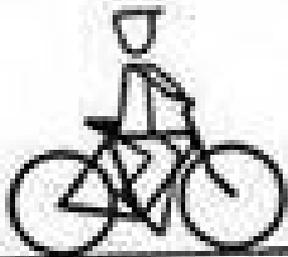
- Webinar training that covered:
 - Philanthropic Landscape
 - Elements of Successful Fundraising
 - Role of Leadership
 - The Art of Briefings and Gift Requests
- Participant points of interest
 - Campaign trends
 - Donor psychology
 - Upgrading current donors
 - Role of leaders



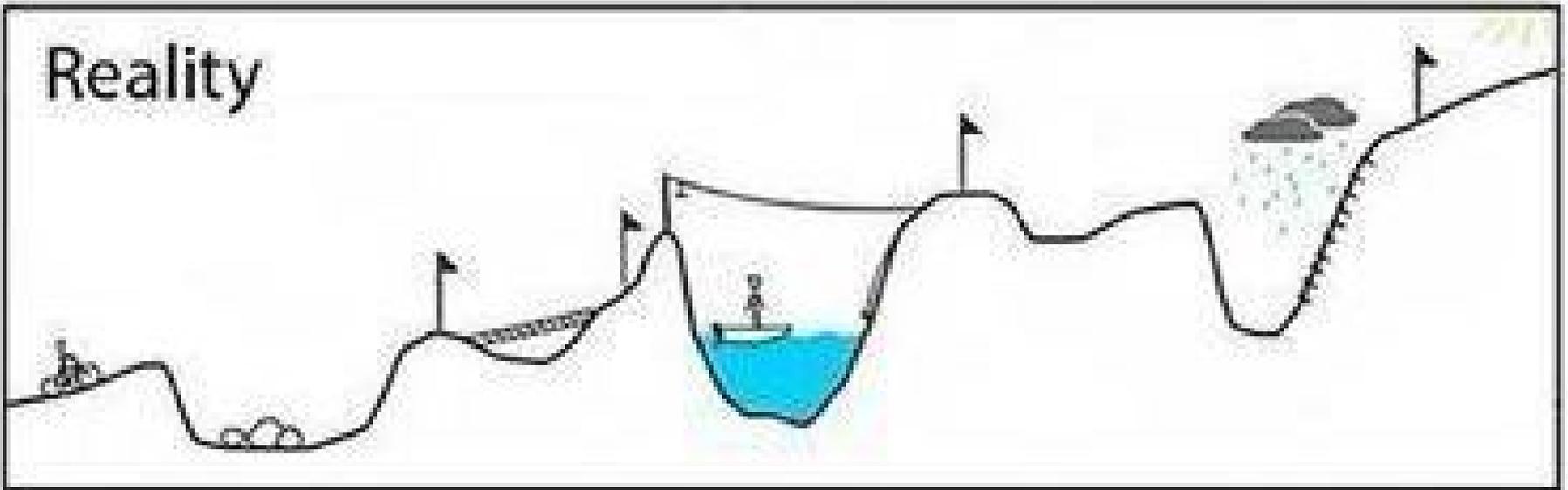
Section VIII

Reflections & Takeaways

Your plan



Reality



Five Key Takeaways

1

- Be creative when you think about how to work with volunteers

2

- Why people volunteer - one size doesn't fit all

3

- Manage volunteers as you would treat hired staff - have a clear plan, role, description, training and recognition in place

4

- Ensure volunteers are learning as part of their experience

5

- Think outside the box when it comes to engagement

Questions? Comments?

Thank you!



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