

**The Development Committee Workbook:
Managing Volunteers to Success
2014 AFFICON**

	ACTIVITY	FREQUENCY
1	Devise Team Purpose	Review annually for relevance
2	Education: Fund Development Primer	One time per year; can include entire board of directors
3	Education: Transparency Primer	One time per year; can include entire board of directors
4	Exercise: What organizations do <u>you</u> give to?	One time per year
5	Exercise – Newsletter/Website review	2x per year
6	Exercise – External Review	One time per year
7	Fundraising Database Orientation	One time
8	Prospect Identification	Rating sessions (individuals, corporations/businesses, foundations)
9	Donor Visits	Ongoing
10	Complements v. Competitors	One time per year
11	Social Networking Strategies	Ongoing
12	Cultivation/Stewardship Events	@ least 2x per year
13	Annual Report	One time per year; can include entire board of directors
14	Book Club Discussion	2x per year (<i>books tbd at beginning of fiscal year</i>)
15	Stewardship Calls	“Thank you for your donation...”2x per year (after each DM campaign)
16	Solicitation Calls/Visits	Ongoing
17	Evaluation & Evolution (off/on-boarding)	One –time per year; after completion of 12 month cycle; “recruitment period”

The Development Committee Workbook: Managing Volunteers to Success 2014 AFFICON

ACTIVITY: Define Committee Purpose

Where/When:

Committee Meeting (annually)

Rationale:

What does XYZ Organization need the Development Committee to do? Each nonprofit organization is different and therefore each Development Committee is different. The committee should define its charge, responsibilities, and roles and how they should be carried out as it applies to the needs of XYZ Organization.

How:

- Engage the CEO and the Chief Development Officer (CDO) to their vision and needs
- Use the Charter Worksheet to structure the discussion
- Brainstorming

Deliverable:

Charter or Mission Statement

Outcomes:

- (1) members of the committee understand their role and what is expected of them and
- (2) the charter or mission statement will enable current members to recruit new members

**The Development Committee Workbook:
Managing Volunteers to Success
2014 AFFICON**

ACTIVITY: Education: Fund Development Primer

Where/When:

Development Committee Meeting

Rationale:

Nonprofit volunteers are industry leaders, connected individuals, and in general, brilliant people. However, the specifics of the nonprofit sector including how an organization recruits philanthropy revenue, the process, and the ethics are often not subjects with which our organizational volunteers have much experience. It is important that organizations provide its volunteers with basic education about these topics.

How:

Consultant facilitated session for either the Development Committee or the entire board on the following (see attached):

- Donor Bill of Rights
- Donor Pyramid
- Review of the AFP Ethical Guidelines
- What to do and how to act on a donor/prospect visit
- For what purposes your organization uses philanthropy revenue

Outcomes:

- (1) A greater understanding of fund development
- (2) A greater understanding of how philanthropy fuels the XYZ mission
- (3) Understanding of the process of development (qualification, cultivation, solicitation, stewardship)
- (4) An understanding of ethics in fundraising
- (5) Increased sense of comfort in visiting with donors; making the ask

The Development Committee Workbook: Managing Volunteers to Success 2014 AFFICON

ACTIVITY: Education: Transparency Primer

Note: this exercise should first be done with XYZ Senior Leadership

Where/When:

Development Committee Meeting

Rationale:

More than ever before donors have a wealth of information available at their finger tips. Unfortunately, the way information is interpreted may not be the way nonprofit volunteers or staff member intend for it to be interpreted. Reviewing information on organizational 990s and Guidestar will enable volunteers to consider scenarios where donors might have questions or further explanation is needed.

How:

- Review the components of a 990 (not necessarily a completed 990)
- Solicit feedback from the committee on what items might be of particular interest to them as donors (this might be better done as homework and then a blind ballot submission)
- Review the SEC 990s to see if those questions are answered by reviewing the documents
- Address concerns with answers/explanations (to mitigate negative feelings)

Outcomes:

- (1) A greater understanding of the important/relevant components of the 990
- (2) A plan to be more transparent

**The Development Committee Workbook:
Managing Volunteers to Success
2014 AFFICON**

ACTIVITY: Exercise - What Organizations do *You* give to?

Where/When:

Development Committee Meeting

Rationale:

This exercise helps volunteers to grasp the concept of best-practice in the field of philanthropy/fundraising. It picks apart the components of successful organizations and why donors continually support them.

How:

Consultant or staff facilitated exercise:

- List – what organizations do you support?
- List – what organizations will you NOT support?
- Stay on list #2 – and ask – why?
- Go to list #1 – and ask – why?

Generally, what happens during this exercise is that volunteers realize the tactics they've been suggesting for your organization are tactics that the organizations they "don't give to" employ. AND...the tactics they don't want to do are why they donate to other organizations.

Outcomes:

- (1) A greater understanding about the tactics of successful fundraising organizations
- (2) A greater understanding of what volunteers can do to contribute to successful fundraising at XYZ Organization

**The Development Committee Workbook:
Managing Volunteers to Success
2014 AFFICON**

ACTIVITY: Exercise – Newsletter/Website Review

Where/When:

Development Committee Meeting

Rationale:

To address the biggest question among many organizational volunteers i.e.: “what do we raise money for?” or “how is philanthropy revenue used?”

How:

- After each newsletter is produced and mailed, allocate a portion of the next Development Committee meeting to discuss – how philanthropy revenue is used by reviewing the newsletter.
- Brainstorm and collect the responses (be sure to report these in the minutes)
- If there are suggested tactics for improvement, communicate to newsletter editor for next issue
- Repeat for next issue
- Note: can be done by reviewing website as well

Outcomes:

- (1) A greater understanding of how XYZ uses/depends on philanthropy revenue
- (2) An increase sense of urgency to recruit philanthropy revenue

The Development Committee Workbook: Managing Volunteers to Success 2014 AFFICON

ACTIVITY: External Review

Where/When:

Introduce at committee meeting, work to be done outside committee meetings (i.e. homework)

Rationale:

Different people respond to different fundraising/communications tactics. In the end, emotion is what brings a donor to act. Committee members can help to construct a multi-faceted approach by surveying the landscape of donor “asks” by different organizations and discussing what might work for XYZ Organization.

How:

- Chief Development Officer to provide committee members with suggested websites to review (note: the websites should belong to organizations in the same realm of your organization)
- Development Committee to review various organizational year-end appeal letters and email appeals; suggest letters/language that will fit with XYZ’s culture and feel (again, in the same realm)
- List the specific tactics and the emotional tug (e.g. an eblast about how the American Red Cross was using local volunteers to help victims in Japan; local pride)
- Committee members to discuss findings at a committee meeting

Outcome:

XYZ Organization is applying “better-practice” tactics to its communications and fundraising appeals

**The Development Committee Workbook:
Managing Volunteers to Success
2014 AFFICON**

ACTIVITY: Fundraising Database Introduction

Where/When:

In Committee Meeting

Rationale:

The volunteer Development Committee doesn't have intimate knowledge of the data that can be stored about organizational donors and prospects. In order to aid volunteers in their calls and information gathering activities, an overview of the data collected and how it is used might provide beneficial.

How:

- Conduct an in-meeting presentation that includes screen shots of the organizational fundraising software.
- Review basic overview of the software and provide examples of how information can be queried in order to be more targeted and cost effective if approached.

Outcome:

Development Committee members will be able to better appreciate how data can be used to advance the philanthropic mission. Volunteers will be motivated to collect and report the information back to the development office.

**The Development Committee Workbook:
Managing Volunteers to Success
2014 AFFICON**

ACTIVITY: Prospect Identification

Where/When:

In a Committee Meeting

Rationale:

Volunteers provide valuable connections from the organization into the community. Connections, personal, professional and collegially associations will foster an introduction and enable a nonprofit to form a new relationship with a person or business.

How:

Via "Rating Sessions" on (1) corporate sponsorships (2) individual donors (brainstorming session can be done in development committee to build list of individual prospects) and (3) foundations (what board members do you know?). Development Committee and the Board as a whole (Development Committee Chair to introduce the activity at a board meeting) should participate in these sessions.

Outcomes:

- (1) Filling the "donor pipeline" for XYZ Organization
- (2) increasing the number of donors to XYZ Organization
- (3) increasing awareness among relevant audiences about XYZ Organization, its programs, and contribution to society

The Development Committee Workbook: Managing Volunteers to Success 2014 AFFICON

ACTIVITY: Donor Visits

Where/When:

Homework (i.e. outside of development committee meetings)

Rationale:

While staff can often speak very effectively and eloquently about a nonprofit's mission, it is more often the volunteers who provide the most amount of credibility and validation for support. The reason – volunteers don't get paid to do it! Escorting the Executive Director on donor and prospect visits is only going to make a positive impact to fundraising, public relations and volunteer involvement.

How:

- Construct XYZ Organization's "Top 100 Donor list" and "Top X# Prospect List"
- Face-to-face visits with donors/prospects/businesses/government officials with Executive Director
- Thank you calls to donors after events and direct mail appeal drives

Outcomes:

- (1) Increased giving (number of gifts and amount of gifts)
- (2) Increased volunteer satisfaction
- (3) Increase in volunteers

The Development Committee Workbook: Managing Volunteers to Success 2014 AFFICON

ACTIVITY: Complements v. Competitors

Where/When:

Explain in Committee Meeting; work to be done in between meetings (homework)

Rationale:

Organizational complements are those entities that enable your organization to grow and thrive, i.e. you need them and they need you. Competitors are entities that do the same work as you. There needs to be a reason why a program beneficiary would go to your organization versus yours. The same can be said about donors. Volunteers and staff who have a good understanding of its competitors as well as its complements are better able to speak to the benefit of their organization and the role it plays in the nonprofit sector/industry.

How:

- Invite some extra staff members to a Development Committee meeting and host a SWOT analysis session (competitors should be revealed under “T” or threats; complements should be identified in “S” or strengths or “O” opportunities); purposefully list the complementary entities as well as the competitors
- Assign Homework: ask Development Committee members to research one complement and one competitor (give them specific questions to answer)
- At next meeting, appoint someone to facilitate a discussion as to why they complementary organizations provide benefit; that same person to facilitate a discussion on why a service beneficiary/donor would choose XYZ organization over the other competitors
- Encourage volunteers to provide insight as they did their research and have knowledge.
- The Committee could take this further by looking at fundraising strategies/tactics of the competitor organizations

Outcomes:

- (1) Increased understanding among volunteers regarding the bigger picture of XYZ Organization
- (2) Increased number of people that can speak to the benefits of XYZ Organization
- (3) Increased volunteer satisfaction

The Development Committee Workbook: Managing Volunteers to Success 2014 AFFICON

ACTIVITY: Social Networking Strategies

Where/When:

Outside development committee meetings (homework)

Rationale:

Organizational primary service beneficiaries do not define prospective donors. In many cases, it extends far beyond to loved-ones, friends, etc. Social media is a avenue to educate non-donors while strengthening the relationship with current donors. Since social networking tactics are a passive approach, it is important to have as many people as possible participating in this activity. This is a “many hands make light work” approach and cannot be taken on effectively by one person. All volunteers need to have an online connection to XYZ Organization and must also work to drive traffic to the XYZ website to (1) ensure relevance and (2) add credibility.

How:

- All volunteers participate in a social networking to advance XYZ’s mission and enhance communications/awareness
- All Board Member/Development Committee members list “Director or Volunteer of XYZ” on their LinkedIn profiles; also show affiliation on Facebook

Outcomes:

- (1) Increased public relations
- (2) Increased credibility
- (3) Leverage volunteer connections
- (4) Increase number of friends/fans

**The Development Committee Workbook:
Managing Volunteers to Success
2014 AFFICON**

ACTIVITY: Cultivation/Stewardship Events

Where/When:

Discuss in Committee Meetings with planning and implementation outside of meeting times

Rationale:

Volunteers are the connectors for the organization. It is the relationships of the volunteers that help to fuel the mission of the organization and thus need to be introduced and educated about that mission and the organization's purpose.

How:

- Planned Giving/Legacy event – Committee member members to act as hosts/ambassadors and meet/talk with people they don't know
- President's Circle events – same as above
- Intimate gatherings (e.g. 20 people) hosted at a volunteer's home or at the XYZ headquarters. Guests are determined by the host; program is determined by staff and host committee.

Outcome(s):

- (1) Increased interest in XYZ (donor and volunteer support)
- (2) New donors to XYZ
- (3) New volunteers

**The Development Committee Workbook:
Managing Volunteers to Success
2014 AFFICON**

ACTIVITY: Annual Report on XYZ fundraising

Where/When:

Committee Meeting

Rationale:

The Development Committee should be able to speak to (1) how much money the organization raises (2) from what sources and (3) why it is important (e.g. leverage factor). As members feel more comfortable about speaking with donors and prospects, this internal knowledge will enable them to better position themselves to ask for support. Additionally, the committee should also be aware of how philanthropy revenue is spent.

How:

Presentation to the entire board of directors after the completion of the fiscal year and should include:

- Where the money comes from (event revenue vs. grants vs. contracts)
- Opportunities for improvement/brainstorming

Outcome:

Volunteers will be able to speak to this when out on donor calls (Top 100 Visits)

The Development Committee Workbook: Managing Volunteers to Success 2014 AFFICON

ACTIVITY: Book Club Discussion

Where/When:

Committee Meeting (2x per year)

Rationale:

Recruiting philanthropy from sources to fund organizational missions is based on a body of knowledge, best practices, and research. While XYZ employs a talented professional staff to lead this initiative, it is important to bestow some of this knowledge to the volunteer corps.

How:

Consider the following books to review:

- Asking – Jerold Panas
- Fundraising Habits of Supremely Successful Boards – Jerold Panas
- *Add assignment to “homework” – ask committee to review recommendations of fundraising books on Amazon.com and email three book titles with rationale as to why they selected that book to the CDO.*

Outcome:

- (1) Increased trust in philanthropy staff (among volunteer)
- (2) Appreciation that philanthropy is a bona fide revenue stream
- (3) Understanding about the need for philanthropy (despite the discomfort)
- (4) More comfort with the process

The Development Committee Workbook: Managing Volunteers to Success 2014 AFFICON

ACTIVITY: Stewardship Calls

Where/When:

Outside of Committee Meeting (homework)

Rationale:

Research has shown that when an individual makes a contribution, endorphins are released in the brain creating a feeling of euphoria. After time passes, however, feelings of regret may follow (note: this also happens after a major purchase and is termed “buyer’s remorse”). Feelings of buyer’s remorse are dangerous to nonprofit organizations because the donor may not want to continue support of that organization (because the negative feelings are the most recent). The most effective way to mitigate buyer’s remorse of donors is to immediately and continually steward them (i.e. you are putting positive feelings in the most recent position). A thank you letter from the organization sent 48 hours after the donation is received is one way, however it is expected by the donor. Another way is for a volunteer to call the donor to only say “thank you”. In today’s electronic society, a phone call is viewed a very personal. Combined with it being carried about by a volunteer (i.e. a person who is not getting paid) carries tremendous meaning to the donor.

How:

- A list of donor names, phone numbers and the date of their most recent gift will be created by the philanthropy staff and distributed to Development Committee members.
- During a time that is convenient for the volunteer, calls will be placed to the donor; volunteers will:
 1. Introduce themselves as a volunteer of XYZ Organization
 2. Let the donor know they are not calling to request support; and
 3. To only say thank you for their recent gift made on X date
- Donors may engage the volunteer in conversation after that or not; if the donor does engage, this is a good opportunity for the volunteer to learn more about the donor’s connection to XYZ (i.e. why do you donate? Etc.)
- Volunteers then provide feedback on each call to the Philanthropy Staff so the data can be entered into the fundraising database

Outcome(s):

- (1) Increased renewal gifts
- (2) Increased donor/volunteer satisfaction

The Development Committee Workbook: Managing Volunteers to Success 2014 AFFICON

ACTIVITY: Solicitation Calls

Where/When:

Outside of Committee Meeting (homework)

Rationale:

Engaging a volunteer in the solicitation can be one of the most effective tactics in securing the gift. The non-paid volunteer adds credibility to the organization and the fundraising initiative. XYZ organization should also strive to align the relationship of the volunteer and the prospect (i.e. peer relationship in some sort). Engaging volunteers in the solicitation process also demystifies the process allowing a greater sense of comfort. The more comfortable volunteers become, they will respond to more opportunities.

How:

- This activity should only be employed after prospect identification and cultivation has progressed to a sufficient stage. Ideally, the volunteer who attends the solicitation visit has been involved in some of the previous processes (for familiarity).
- The development officer will schedule a visit for the purpose of a face-to-face solicitation.
- Prior to the meeting, the CDO or DO will review the meeting agenda with the volunteer. Ideally, they will role play in order to work out any kinks and for the volunteer to be as comfortable as possible with the process. Note: the DO will find a role that is appropriate for that volunteer (e.g. explain their role on the board or as a volunteer -or- explain their connection to the organization or why they give).
- The DO will have a predetermined solicitation amount planned as well as a target for that request (e.g. \$50,000 for the new building).
- The DO and the volunteer will review and discuss how to handle objections prior to the solicitation meeting.

Outcome(s):

- (1) Increased # of secured gifts
- (2) Increased \$ amount of gifts
- (3) Increased donor/volunteer satisfaction

The Development Committee Workbook: Managing Volunteers to Success 2014 AFFICON

ACTIVITY: Evaluation & Evolution

Where/When:

At end of 12 month cycle; start at a Committee Meeting and institute a “recruitment period”

Rationale:

Volunteers are going to be most engaged and most successful when they are successful (or feel they are making an impact). The Evaluation process enables the group as a whole to compare its year-long activities against the charter that it created 12 months prior. It also allows the group to adjust in order to better meet its objective in the future. Many times, the “adjustment” refers to committee member recruitment (or off-boarding).

How:

- The CDO should develop a survey for the entire Development Committee to answer (note: the frame is from the committee as a whole – not individuals); this can be a self assessment.
- The Development Committee Chair should then facilitate a discussion about what worked and what didn’t; develop next steps toward achieving more positive outcomes.
- In terms of Committee Member recruitment – brainstorm with the committee on attributes of the ideal Development Committee Members (e.g. sales background, member of chamber of commerce, and country club, active in college alma matter...). Use this list as the basis for a rating session for future committee members.
- Allow ineffective committee members to term off or resign.

Outcome(s):

- (1) More productive committee
- (2) Increased donor/volunteer satisfaction
- (3) Other nonprofits will look at your organization with envy!!