

Slide 1: Hello everyone. I'm Julia Gingrich. I'm the Director of Philanthropy and Engagement at United Way Waterloo Region Communities. And today we're going to be talking about fundraising and development volunteers. So how we can work with volunteers to help us build resources for our organizations.

Slide 2: I'll start by going over our three objectives for the module. And these are the things that we hope to learn throughout the module. So, we want to provide an overview of the ways that fundraising volunteers support non-profit organizations- all the different ways that volunteers might get involved with you to help fundraising. We want to provide some insight into the types of volunteer fundraising roles that may exist already in your organization or that you may be able to create within your organization. And finally, we'll provide an overview of recruitment, training, and support of fundraising volunteers.

Slide 3: So, why fundraising volunteers? I think often we are doing many things in the non-profit world and sometimes fundraising can happen off of the sides of our desk. And so, it's an excellent place for volunteers to help move your organization forward and allows you to focus on your mission and the work that is so important to the people that you work with. So, fundraising volunteers of course raise money for the organization, but also can help amplify the organization's message, build relationships with new donors- this is a really key piece, and we'll be coming back to this a lot, that piece around relationships- and that really flows into stewarding existing donors. So really continuing those relationships with your donors as they support your organization.

Slide 4: Fundraising volunteers have, of course, a lot of value. You know, a really strong network of fundraising volunteers really can't be undervalued. Organizations ideally want to have a group of these volunteers in place with a strong system to support them. And we're going to talk about these two pieces. And as I mentioned earlier, they really support the organization in several different ways. But it's also a two-way street and so while volunteers are supporting your organization, but also gaining excellent skills- skills around public speaking, networking, they're building connections, and of course, they have a strong sense of giving back because they're helping to really resource and make your mission happen.

Slide 5: So right now, I want to take a moment to do some reflection. We're going to have three reflection moments throughout this module. They'll all be taking and pulling from the same place so we're just going to keep building on the questions. To start, we're going to think about donors and your organization. So, in a moment you can pause the video, but first let's just talk about what you're going to do. Take a few minutes, write down all of the ways donors currently engage with your organization. So really think through all of the different touch points that you have with donors. That may be your social media, may be newsletters that you send, it may be thank you phone calls, it may be thank you cards, it may be going out for coffee- many, many different ways that donors engage with our organization. So, think through as, as many as you can and then we'll be coming back to this list throughout the module. So, just pause the video, take some time to write that down, and then continue forward.

Slide 6: The fundraising cycle is a key component in fundraising and development. So, it really includes four steps in the way that we connect and fundraise with donors. And this cycle really breaks down the important steps in soliciting gifts and can be really applied to large and small gifts. This cycle happens no matter how we're connecting with donors and volunteers can absolutely play a role in each of these stages. So, in the first identification, volunteers can identify potential donors through their peer network, their work connections, their family connections- really anywhere where volunteers are connecting your organization to their world and their networks. Second step, cultivation is really about listening. So, it's listening to what donors are interested in- what change they really want to see in their communities and then sharing information about your organization and how that connects to their interests or their passions. So, sharing about your organization can happen through conversations, it can happen through emails, through letters, through newsletters, through social media. There's really so many ways that we can connect and build that understanding and relationship with potential donors. The third step, solicitation can often feel the scariest because it's about making that ask for a gift, but it's really third in the cycle because relationship building is, is essential before making an ask. So, by the time you're making that ask for a donation it's much easier because you've already, you know, connected with people. You've built that relationship. And volunteers can have a really important role to play here because they have potentially identified, built a relationship- and so they're really in the right position to make that ask. And then once you've received a donation- so you've built a relationship, you received a gift from a donor- of course it's important to steward and build that relationship with the donor. Stewardship happens in a lot of different ways depending on your organization, depending on the groups that you're working with- whatever is sort of appropriate and culturally appropriate for those groups. And so, it can happen through thank you calls or letters, conversations, events, reporting impact back, social media engagement, food sharing- so much can happen in this stewardship phase of the cycle. And volunteers are such an important part of this, of really stewarding ongoing relationships with donors.

Slide 7: So, fundraising and development volunteer opportunities. As we've talked about, there are many ways for volunteers to give back to their community through fundraising and the following slides that we're going to look at really list different types of fundraising volunteers. So, we're really going to dive into all the different ways that volunteers may get involved with your organization as you know, specifically around fundraising and development. So, as we go through these next several slides. Considering how a specific focus like a targeted fundraising initiative might help to define the role and scope of the volunteers. So, within each of these, it can sometimes, not always and it really depends on how your organization works, but it can sometimes help the volunteer to focus their work to think about who they may contact, how do they may cultivate that relationship, how they may make the ask, how they may steward it by having a very specific targeted fundraising initiatives. So, whether that's a capital campaign, whether it's fundraising for a program, anything like that. So just keep that in the back of your mind as we go through the next roles for volunteers.

Slide 8: So, we'll start with board members. This is an obvious one. This is something that all of our organizations have, and of course, board members provide connections. They provide

networks. They provide, you know, really access to the folks in their communities. They really are typically your strongest fundraising volunteers because they're obviously are committed to the mission. They're committed to the work that you're doing by being on the board- by spending that time. And so, they can take that understanding. They have a very, very deep understanding of your organization by sitting on the board- can take that understanding and really build it out into a fundraising role as well. So, one of the best practices that we suggest is to make clear that the expectation is that the board members help with fundraising in whatever way they're each able to. You'll always have a range of folks. Some folks who are really comfortable making those cold calls and reaching out. Other people who just may be more comfortable coming along with as, you know, playing, representing the board on a conversation with a major donor. Maybe they're comfortable sharing social media. There's lots of different ways that the board can get involved, but it is important that there's an expectation that they'll be in some way helping with fundraising. We also note that it's wonderful if they're donors themselves, if they're able. And that, of course, again, depends on the board members, but if members are able to be donors as well that can be a very strong story for potential donors- when a current donor says this is why I donate. That really is one of the strongest ways that helps people to move into that position of donating resources to your organization.

Slide 9: There is a real opportunity for volunteers to support our work in stewarding donors. So, we know that fundraising is more than just making an ask and stewardship, which is really about taking care of the donor after a gift is made, is just as important as making that ask. The stewardship really means retaining donors. So, it's much more costly to acquire a new donor than to retain an existing donor. And so, working on that stewardship piece- putting resources, especially volunteer resources, into that piece of stewardship can be so helpful to your organization. One of those ways is stewarding major donors. This can be really important for maintaining those large gift relationships. Volunteers can help with this important work by making connections to major donors. So, starting off the cycle, attending conversations when we're cultivating relationships, and then building an ongoing relationship. So that's the stewardship piece. Helping to ensure that we maintain that ongoing relationship with a major donor. Volunteers could also help with the overall stewardship of all of our donors. So, they can do that through thank you calls, writing thank you notes, even hosting thank you events that are food-based, following up with donors about the impact of their donation, and connecting with people on social media. There's so many ways that volunteers can help to steward all of our donors and ensure that they donate again and maintain a relationship with our organization.

Slide 10: So, another type of volunteer is committee and event volunteers. This is probably likely very familiar to all of us. Volunteers are a wonderful addition to our committees and our events. So these are the folks that help us with our events. They provide fundraising ideas on committees, reach out to contacts and connections, also for events can sell tickets, secure sponsorships- this is a really key one if you have volunteers who are able to reach out to sponsors that they may have relationships with this can really help to support your events. At the end of the event, of course they may, volunteers could help to reach out and thank event sponsors. And the one that we're all very familiar with volunteers can absolutely provide hands-

on support running fundraising events. There are some organizations where their events are entirely volunteer run. From managing the volunteers, a volunteer does that to organizing the entire event to making it happen to booking the space- all of those kinds of things. And of course, these days during the pandemic, events have changed a little bit and we're often online, but there are still ways for volunteers to really help make whatever type of event, whatever style of thing you may be doing to make that happen. So, there are lots of ways for volunteers to join in on this type of work as well.

Slide 11: Another type of volunteer is a workplace volunteer. And so, these are volunteers who are working in their own workplace to fundraise for you through their workplace colleagues. So, they can hold a fundraising event or a campaign in their workplace. Maybe a campaign as a longer week of events. Really we know that workplaces are often looking for activities that promote things like engagement, team building that build on their corporate social responsibility ideals, and so fun fundraising activities can really hit all of these targets and bring those things together to give value to your organization, to the workplace, to the employees. So, it's a really interesting and fun way to get at a lot of goals. They, things at workplaces can include different fun activities, things like gift card draws or dress down days, bingo, trivia nights, anything really that the workplace comes up with and thinks would be fun for their employees but would also raise money for your organization. And this is a really important type of volunteer and one that we can really support with all of the details and information about what your organization does so they then can use that to engage their own employees.

Slide 12: Another type of volunteer is a peer-to-peer fundraising volunteer. And this really does extend from workplace volunteers because in those workplaces, they're also doing peer to peer fundraising, but peer to peer fundraising can go far beyond the workplace. And so, it's really at its core volunteers fundraising to their own networks and their own community on your behalf. So, they're really letting the folks in their life know about the importance of your organization and why they believe in your organization. And that really builds trust with your organization because people in their networks are hearing about it from someone that they already trust. Someone who already sort of speaks their language in terms of the way that they see the world and so that person can share with them about the importance of your organization. So, we've seen peer to peer fundraising taking place, you know, in very large organizations to small organizations. And it can include things like bike rides and walkathons, which we're all familiar with seeing out there, but it can also include birthday fundraisers, trivia nights, wine tasting, whatever someone thinks that their own network, their own community would be interested in participating in. And that could then also help to build and fundraise resources for your organization. One of the key pieces, of course, to making these kinds of activities a success is ensuring that your organization supports the volunteers who are running them. So, supports them with whatever they might need, whether that's social media graphics, whether it's some messaging, whether it's maybe even an individual webpage, if that's a possibility for you. But just ensuring that they have all of the tools to make their peer-to-peer fundraising, whatever that may be, a real success for them, for their network, and of course, for your organization.

Slide 13: There are so many ways for volunteers to get involved in our fundraising and development work in our organizations. And you can be really creative about what that looks like in your organization. You know, thinking about spaces where volunteers can make the impossible possible. And so I've just listed a few here, but there are so many ways- thoughtful and creative ways for volunteers to get involved in connecting with our networks and sharing your message and asking people for donations and building a relationship. So that might be, you know, there's such a scale in terms of volunteer involvement, but that might even be through social media amplification. You know, tagging friends in some of your posts, making their own posts and tagging friends. So, lots of ways that social media can of course be used to connect with potential and existing donors. Volunteers could also make videos, quick videos of themselves sharing why they donate. They could write newsletter articles for you about why they donate. They could interview other donors and talk about why all of them donate. So, it's really sharing that story of why they are donors with sort of your larger and wider audience. They could also do challenges and matching gifts within their own networks. So, maybe they put a challenge out to their network to say, you know, if you donate so much, I'll match that with my own donation. And they can kind of build excitement around fundraising and around sharing resources with your important organization. There are really so many ways for volunteers to get involved in fundraising and making a difference at your organization.

Slide 14: So, we're going to take another moment here to do some reflection and this is going to be continuing on with the list that you created earlier. So, let's return to that list if you can find it somewhere beside your computer. And brainstorm any new ideas for donor engagement to the list. So are there things that you would like to do to engage your donors, but you haven't had the time and space? Any other new ideas that popped up for you while we, while we were going through the different roles of potential fundraising and development volunteers. Once you've created that list and you've just kind of exhausted all the ideas you can come up with right now, I want you to reflect on the list and circle the idea that feels the most urgent. So, the idea that feels like this really needs to happen now to make a difference for our organization. Then circle the idea that feels the most doable, which one feels like, yeah, this is very possible - we have all the resources in place to do this right now. And then let's circle a third idea that feels the most exciting. So, which idea feels like ooh, this is something we really want to start thinking about - it would make a real difference to our organization. So, take some time to, to stretch out that list and then to make those three circles.

Slide 15: So now that we know how important fundraising volunteers can be for an organization and what difference they can really make, we want to think about how we're going to recruit those volunteers to work with us. So, some of the best places to start are to really leverage existing relationships and connections. You know, consider who you're already working with, who might be interested in sharing your message that way, who might be interested in participating in that donor fundraising cycle and might have the skills to do that. You might also want to consider where you might have gaps in the organization. So, what kind of groups are you not connecting with right now? And how might you start recruiting with folks from groups outside of the communities that you're already connecting with so that they can also then share your message and do some fundraising within their broader communities? The next thing

we want to do is listen. So, what are your contacts interested in? Listen to the folks that you already know, the folks that you're getting to know, and think about what kind of things they're interested in, what kind of, where are their passions within your organization? What can they speak to? And really think about their passions and how you might sculpt that to help work with them to fundraise for your organization. You also really want to be clear about the skills that are needed when you're recruiting. So, often skills that are important within fundraising in most of the areas- you know, there's a lot of ways to help with fundraising and so it's not all the time, but if you're thinking about that relationship piece, that stewardship and making those asks, that type of thing, you want to ensure that the volunteers that you're recruiting and hiring are used to, and, and willing to connect with people, to have conversations with people. That they're, that they're interested in connecting with other people and potential donors because that's going to be a real key part of working in fundraising and development. The other last thing I'll mention is that you want to identify if there are situations that, where you may not accept a volunteer. So, is there a time where accepting a volunteer may not be appropriate? And this will really differ for each organization based on your mission, mission and vision and values, your equity policy. An example might be, you know, would an agency, agency providing service to those experiencing addictions be able to accept a volunteer or even a donation from a company that makes or sells marijuana products? So, the answer may be yes, but there are definitely situations where you'll want to really think through why and, and how you're bringing volunteers into the organization.

Slide 16: So now that we've recruited a fundraising and development volunteers to support and help our organizations, we want to ensure that they're set up for success- that they're starting with a strong, foundational training. And so, there's some key training elements to think about as you're preparing for fundraising and development volunteers to support your organization. One of the key pieces, of course, is that they have a strong understanding of your organizational mission, vision, values. That they really know how to speak to that, that they can speak to it naturally and organically, and it really flows for them in terms of how to speak about the amazing work that you're doing, why you're doing it, and the impact that it's having in the community. You also want to think about that fundraising cycle. We've talked about that lots and during the training is a great time to help volunteer understand all the pieces of the fundraising cycle and to help them think about how they might participate in the different aspects of the fundraising cycle. To help them to build on their own skills that they bring to the job. Maybe that's really connected to thank you's and stewarding donors. Maybe it's connected to cultivating relationships and maybe it's even connected to making those asks in terms of people giving money. Another piece is to think about dealing with difficult questions. So, to really prepare your volunteers for things that you know come up within your organization that donors are really interested in learning more about that the answers may not be right at the surface that you have to dig a little deeper. And so really preparing them with the answers to those questions that you know are common from donors when they're trying to learn a little bit more deeply about your organization and how to explain perhaps the ways that you fundraise, the ways that you give money out, the ways that you put money into programming, whatever that may be- to speak to it really clearly for the volunteers. The last piece, of course, is the ask. The ask is often the most nerve-wracking part and what people think of when they think of

fundraising, but it's really the front and back-end work that we've already discussed around stewardship, around cultivation, making the connection, and building the relationships- then stewarding and reporting back. Those are the really key things to having a donor come back again. So that's why it's so important to have volunteers involved in this entire cycle. We also know that it really is far less work and money to retain a donor than to get a new one. And so that's why all of those pieces of the cycle are so, so critical beyond just the ask. Although of course the ask is really important. We need to let donors know what the opportunity is for them to share their resources with your organization. And so, helping to train your volunteers to make those asks in a natural and comfortable way is critically important to fundraising and development volunteers.

Slide 17: And so of course, after training and having volunteers work with us in this way, we want to ensure that we continue engaging with them and thanking them for their incredible work. They really are critical to an organization's success within fundraising, and we want to make sure we're supporting them throughout their time with us and thanking them for all the work they're doing. One of those ways of course, is working closely with fundraising volunteers to build mutual learning. So, you're learning from them around what donors are looking for, you're learning from them around what they're hearing out in their work. They're learning from you around how to talk about your work, how to share what you're doing with the community, and then how to make sure that that's building resources to come back to your organization. And so, we want to thank them for all of that work that they're doing. Strong and consistent thank yous, of course, based on their personal preferences. So, what those specific volunteers would appreciate as a thank you. Making sure we take the time to do that because it's such a critical role and we want to ensure that those volunteers have an excellent experience with us throughout their time at the organization.

Slide 18: Our last reflection question is around volunteers and fundraising and development. So, I want you return to the donor engagement list and reflect on those three ideas that you circled. As you reflect on those, here's a few questions to consider. How might volunteers support those three ideas? How might volunteers support the different stages of the fundraising cycle for each of those ideas? So, if you think of each of those ideas and think through the fundraising cycle, how might volunteers interact in those different places? Whether it's opening their networks, building the relationship, stewarding the relationship, making the ask. Also think about which current volunteers that you have right now in your organization that might be able to grow into a fundraising role. Maybe they're doing something else, but they are interested in a new challenge. You've noticed that they are really, have a strong ability to speak to your mission and vision. And maybe you can start to move them into a fundraising role. And of course, how would you recruit new fundraisings volunteers to support these ideas? How might you reach out to the networks that you already have, but even reach beyond that to find fundraising volunteers to support these three ideas? So, take some time to think about that.

Slide 19: Finally, we'll end with some key takeaways at the end of this module. We hope that you've learned a little bit and started to think about how volunteers may support fundraising

within your organization. We want you to take away the idea that fundraising volunteers can play many, many roles. So that's from securing major donors to amplifying your organization's message over social media. There's so many fundraising volunteers can get involved to help make your organization stronger. Fundraising is about relationships. We can't say this enough. So, volunteers who love connecting with people can absolutely grow into this role. People don't have to be expert fundraisers. There's so much room to grow in because it's based on relationships and folks who love connecting with people will love this role. Lastly, maintaining a strong relationship with fundraising volunteers supports them in their work and strengthens your fundraising team. So, ensuring that you're thanking and supporting volunteers with whatever they might need to do fundraising the best for your organization. Thank you very much for joining this module and wishing you all the best in building your fundraising program in your organization.