

Jane: Hello again, my name is Jane Hennig. I'm the Executive Director at Volunteer Waterloo Region. And I am here today with Kathy Irwin, Diane Wiles, and Julia Gingrich. And I'm going to pass it over to each of you to introduce yourselves and tell us a little bit about where you work and your role with your organization. So, Julia, let me start with you.

Julia: Sure. Thanks. Very happy to be here. So, I'm Julia Gingrich, as you said, and I'm the Director of Philanthropy and Engagement at United Way Waterloo Region Communities. And so, we really focus on fundraising in the community and supporting that network of social services that we have in Waterloo region.

Jane: And Diane.

Diane: Hi there, I'm Diane Wiles. I'm CEO of Leadership Waterloo Region. And at Leadership Waterloo Region, we run a 10-month experiential community leadership program. This year we have 27 in our cohort and since 2000 we have graduated almost 500 leaders in our community. Thank you.

Jane: Kathy.

Kathy: Thank you, Jane. My name's Kathy Irwin. I work for Alzheimer's Society Waterloo-Wellington. My role at the society is development administrator and volunteer coordinator. Been at my role about eight months, we have over 80 volunteers currently supporting 16 different programs. And our goal is always to have a meaningful volunteer experience for our volunteers.

Jane: So, for each of the modules of this program, we've had a bit of a dialogue afterwards about the different components of volunteer management, the reasons why volunteers get involved. And right now, we're here to talk about the module on volunteering and fundraising. So, Julia, can you share a little bit about what the United Way and how they engage volunteers in the work that they're doing?

Julia: Absolutely. Thanks. Yeah. It's, it's been fun to think about this and talk about it in the module. We, you know, as I said, sort of fundraising is our, is our main piece that we're working on. And so, our volunteers come to help with that. And so, we really look at it, you know, as that donor engagement cycle, which includes identifying donor, donors and cultivating, making that ask, and stewardship of donors. And so, we see a place for volunteers in actually all different parts of that cycle. And so, we have volunteers that work with us on our board, of course, as we all do. We have what we call a campaign cabinet and those are folks who are really just to volunteer, to help us with our campaign. And to, you know, help us connect with different businesses in the community, different people in the community. And so, the board and the cabinet really help us to connect and have those conversations with people who might want to get involved in terms of sharing resources and giving back to the community in that way. We also have volunteers who help us with stewardship. So, with thank you calls things like that. We also have volunteers, one of the biggest things, of course, you may have heard of the

United Way workplace campaign- where we have different workplaces across the community host campaigns to fundraise for United Way. And those folks who work on those campaigns are also volunteers. They're volunteering really in their workplace to make a fun one or two weeks for their colleagues, having special events and that kind of thing. And so, it's a real broad opportunities I think for volunteers to get involved in fundraising. Actually, one other I'll mention is what, you know, people who in the community just want to host an event and raise money and then pass it on to, you know, in our case United way. And so, we've had folks, during COVID, in a neighborhood, come up with a neighborhood cookbook that they then printed and sold and then donated that money. Someone else who carved a thousand pumpkins. And so they were, and then had people kind of donate to come and see all- at Halloween, of course. And, and then, and then pass that money on to United Way. So, there's a lot of different ways that people volunteer their time to fundraise and give back to the community.

Jane: That's awesome because you see the formal ways in which they get involved, but also the informal. Things that you can do in your own neighborhood and your own home and really make an impact in community. So that's really- I like that story. It's a lot of fun. Diane you've worked in fundraising before you were a CEO of Leadership. And you continue to do that in your role, I'm sure as we all do as executive directors and CEOs. Talk a little bit about how you've seen volunteers get involved in fundraising.

Diane: Well, as Julia said, it really is across the spectrum. Like in all, all aspects of the cycle when you look. I did some time at universities, and they had call centers and a lot of times they would bring in sports teams and you could see the football team would call football alumni and they would solicit donations. And what better conversations, right? It was all football. All about what's happening, plays, and donations. And again, it was having that collective goal, you know, they were all excited. They wanted the football team to succeed. So, I've seen volunteers come in in lots of different ways. A lot of times with volunteers- and I know the campaign cabinet at United way, and cabinets at any campaign. It's that leverage, right? So, you need to get in at the higher levels to discuss the big strategy. But I want to come into your workplace and I want to be able to talk to the people that are on your team. And I want you to be able to set up your payroll department so they can actually just give money off their check. Those are all decisions that need to be made higher up. So, it's easier for a CEO of a corporation to get a call back, you know, from their peer, then say myself. So, it's, it's that higher level of leverage that we use. And I've also seen the motivation for volunteerism. A lot of time it's team building, right? It's the best. Everything an employer does it's about attracting and retaining talent. So, when you're able to bring volunteerism in, in a way where there's a tangible benefit. So, your workplace can have fun, raise money, see the amount raised, and donate it, and know what happens to that. That is amazing team building. It's bonding. It's everyone having their eye on the same horizon. So, it's leveling and it's a way that team members can really feel proud of their company. Hey, my company's matching those dollars. We're making a difference. I worked for a company that cares. It makes a big difference, and you can see that with so many corporations in our community how they move forward with their community investment.

Jane: It's really interesting that in a study done by Volunteer Canada, they have found that a third of the people who volunteer in Canada in formal settings, so that's over 4 million people, are supported in their volunteering by their employer. Right, and so there is a really big correlation between employer-support for volunteering and people wanting to stay in a workplace. Really feeling like their employer is contributing to a cause or a community that they want to be in. So, it's really interesting that that can really also impact fundraising. So, I think that's a fascinating connection because we do have a session on employer-supported volunteering as well so it might be part of the conversation.

Diane: I'm sure. And it's that holistic support approach because, you know, we're more than just, and I think COVID has shown this more than anything because when we're on a meeting, we have the kids running in and a cat running across the screen, and we're people. We are all people. So, it's that holistic approach of I'm just not an employee. And I go to work. You're putting back into my community where I'm raising my family and I go to arts events and I go to sporting events and I feel safe- that wellness plan. And that is what your employers are doing. So, by being able to put money into that, because money is action, you know, it gives that feeling of confidence in your employer.

Jane: Kathy, do you see some parallels with the work that you're doing? How are volunteers active in your fundraising initiatives?

Kathy: So, very similar to Julia. Actually, I see quite a few things that maybe overlap. We have operation thank you volunteers who reach out to our donors and people who have held events for us to personally thank them over the phone. We also have several large peer to peer fundraising events every year. Our largest one being an annual walk. So, in-person obviously a lot more volunteers, but even this past year, when we had our virtual walk for people walked their own way- we had quite a few volunteers helping us out and maybe in slightly different roles, some would be in person. We had some social media volunteers. We had some people helping folks with IT, troubleshooting the website. So, pretty exciting we were able to offer that and people were so excited to help with it, which was amazing. We also offer something called social with a purpose. So same idea as Julia was mentioning, we have people basically hold a fundraiser and the purpose being to raise some money to donate back to Alzheimer's society. That's been very successful. Coffee breaks in workplaces, the exact same kind of idea. People are very engaged with it. It really helps us promote the society and what we do. And I think there's still a little bit of confusion about if we only support clients with Alzheimer's versus any dementia. So, I think even just having our name out there and the more people that talk about us and realize that we can help so many more people. This is great for our community. So, we're really big on that. And having our volunteers have a really solid orientation so they can speak to, about Alzheimer's society on our behalf confidently and know what we do and what we offer if it ever comes up in conversation within their personal life- they can say you know what Alzheimer's Society could help with that because that's what we're there for. We're there to help our clients live their best day.

Jane: Yeah, that's, that brings up a great point about having, giving good information for your volunteers too, so that they can feed that back and, and feel comfortable in their role. So, as an executive director and somebody who works with volunteers for, for many years- different motivations are there for different kinds of volunteering roles. So, do you find any common threads in the volunteers that you work with in fundraising that might be really important? Like what, what, what sort of, I want to say skills and motivations, bring out the best volunteers for the fundraising roles that you've experienced in your, your positions? Julia, do you have some thoughts?

Julia: Yeah, absolutely. I think it's a great question because, and it's something, you know, I think all of us are always asking our volunteers- trying to understand a little bit more about them, what brought them. And I think in my conversations with volunteers who work with us in different ways, so whether it's in a workplace or whether it's on our campaign cabinet, I would say the general theme is that they're, you know, interested in giving back to their community in some way. And that sort of what compels them to, to participate in the first place. But I, what I hear from them as once they're participating is those pieces that they get back around understanding the community at a much deeper level. So, folks who have lived in the community for 30, 40 years and say, wow, you know, I didn't realize A we have issues that we're, that we're looking at and supporting in our community, but B all of the work that's being done around that. And so, it just helps people to really understand and broaden, you know, their connection to the community. And I think that's what keeps people coming back. So, they come, you know, wanting to kind of give back, but then that, that ability to network and meet people. I think particularly in fundraising there's a draw from people who, who like meeting people, who like having conversations and building relationships, because that's really at the core of fundraising- is, is building and maintaining relationships. And, and I think the people that are drawn to that, you know, are generally sort of interested in that type of thing. And that's when we're looking for volunteers, we also think, well, who was volunteering with us in different ways that we might be able to shift over into this fundraising type volunteer, you know? Folks who are already have that engagement with community, that interest in community, that ability to connect with other people. And how might we give them, you know, other fundraising tools that can then bring them into that specific fundraising role? So, I think there's, you know, a real kind of cross section of, of what's happening with those different volunteers.

Jane: So, it's good to know that you don't have to be a fundraiser to help fundraising initiatives, right?

Julia: Exactly.

Jane: I think a lot of people are a little bit intimidated by the fundraising terminology and you don't have to be an expert in fundraising to actually be a real benefit to fundraising.

Julia: That's exactly it. And I, and one other thing I actually thought of when, when, when you were speaking, Diane, is that there are so many ways to participate in that fundraising. So, I

think a very micro form of volunteering is amplifying the message. So, folks who are willing to share on their social media, you know, if we have a giving Tuesday or some sort of campaign going on at any of our organizations that people who are willing to spread that. And I think Kathy, you mentioned that as well. You have the people who are willing to spread that among their networks. Whether that's in conversations or social media. And that's an absolute form of, of fundraising and volunteering to fundraise with organizations.

Diane: And, and if I can add the most important thing for fundraising volunteers is the training. You know, they have to, if you're not going to be able to directly ask for the money, then someone on the call has to be able to. You know, I've been on calls with volunteers and, and they say, well, maybe you'd consider helping us. Well, that's, that's not an ask and shame on me if that's the training. And when you talk about, you know, thanking someone as part of that fundraising cycle- you know what, you can't ask for money, you're part of our fundraising committee cause you're out there thanking people. And so that's so important. And it's really important when you have people who can speak to it. So, I remember when I worked at Laurier many years ago, the Dean of science would not ask for money. And I said to him, I can ask for the money as long as we know our roles, you have to practice. But if somebody asks me a science question, I'm faking a heart attack, right. That's not my strength. So, it's, let's get our roles straight and it's so rewarding to know you do not have to always be the person asking. But you know, if you support an organization financially and you're going to be on that call and someone else can say those words, that's powerful as well. So, there's so many ways you can volunteer as a fundraiser.

Jane: Yeah, and that's a really great point. And this really, really speaks to, and our audience is a group of people who are going to work with fundraising volunteers at some point, to be really clear on your messaging. That you, that there are a variety of roles, but also to be really aware of the kind of training that you provide for those volunteers. To make sure that they have what they need and you know where they fit within the whole fundraising process. That's great. So again, I think we're coming to a good time to wrap up. I am just going to open the floor to last thoughts from everybody and see if there's anything else that you would like to share.

Julia: I think one of the pieces, I think Diane you were mentioning around having. You know, first, I think it's so true that that fundraisers- there is such a, that cycle that we talked about, right. And that people can really insert themselves wherever feels comfortable and then potentially grow, you know, from there to feel more comfortable. I know that ask can be scary for anyone and all of us as we, as we build on doing that. But there's so many other pieces, like you mentioned. The other thing that, that stood out to me too is that, that other side of, you know, when we have folks in workplaces doing fundraising. Those peer-to-peer asks that are so important. But in, you talked about it a little bit, Diane, but how beneficial it is to that workplace in terms of having engaged employees. And we know that engage employees are more productive and more committed and loyal to their workplace. And so, when we talk about those high-level conversations with the workplace around that strategy and structure- that, that's such a key piece of those conversations that there's such a benefit and a value add really

to the workplace when they're promoting volunteerism. Promoting donating and giving back within their employees.

Diane: Excellent, great point. I'd like to add, just add that, you know, fundraising doesn't have to be that F-word, you know. It's something I used to work for a woman who said, if it took turnips to run this organization, I'd be asking you for turnips. But it's, the reality is it's money. So, it's really finding out the stories and that's, you know. To get a major gift, you might know somebody three, four years. You might have met with them 10 times and you've not talked money once. It's engagement. And that one time you need to ask. So, it's not like with fundraising, a volunteer has to every time- hi, I'm Diane, will you give me some money? It's not like that. As Julia said, it's about relationship building and there's nothing more rewarding. Can you imagine? You get to go out in the community, meet people you've never met before, who normally you wouldn't cross paths with and having a meaningful conversation about something you're both passionate about. That's perfect. That doesn't happen every day. So, fundraising is that one unique opportunity that you get to align. Because nothing feels better than when you align someone's values with your organization's value and they're giving because they care about the organization, right? They're not giving to get you out of their office. They're giving because it feels good for them. That's so rewarding.

Jane: How awesome.

Kathy: I would agree.

Julia: I agree, yes.

Jane: Yeah. What a way to wrap up. Kathy, Diane, Julia, thank you so much for your time today. I'm sure that the people who are participating in this webinar are going to really appreciate your thoughts and your insights.

Kathy: Thank you.

Julia: Thank you for having us.

Diane: Yeah. Thank you so much for the opportunity, Jane.