Session 2: Crafting an Effective Grassroots Fundraising Plan Chat Messages

Perla Orozco: Hi everyone! Welcome to the 2022 Grassroots Grantee Convening Session 2: Donor Cultivation & Fundraising with Volunteers. We’ll get started in a few minutes.

¡Hola a todos! Bienvenides a la sesión 2 del Convenio de Capacitación 2022: Cultivo de donantes y recaudación de fondos con voluntarios.

Tech Support: Please private message tech support if there is anything you would like us to know or if you are having any technical issues. Por favor, envíe un mensaje privado al servicio de asistencia técnica si hay algo que quiera que sepamos o si tiene algún problema técnico.

Susan Liley: Thank you!

Elizabeth Lambe: Happy to hear recordings and slides will be posted since I have to miss the next session. Really appreciate this series!

Aurora Heying: Welcome everyone! So good to see you!

Tech Support: Here is the link to download this session's slides: https://app.box.com/s/kmhd0fn9mvv0jmtcexo6uoy4cd2llqim

Las grabaciones, folletos y diapositivas se pueden encontrar aquí: https://app.box.com/s/kmhd0fn9mvv0jmtcexo6uoy4cd2llqim

Louis Medina: They are passionate about the cause your nonprofit is engaged in.

Amanda Barragar: We offer a community resource that is needed, especially our offerings to youth and public land stewardship
Angela Sevin: volunteers are passionate about the issues.

Susan Liley Citizens' for Flood Relief De Soto MO: Because they care about their community.

Sophia Sady: They care!

Elizabeth Lambe: I’ve coordinated a lot of volunteers over the years and the most important thing is for them to understand how their participation makes a difference… and it needs to betrue!

Jazzari "Jazz" Taylor: They understand how they can personally or locally benefit for your organization or investing.

Caroline Grauman-Boss: Advances their agenda/need.

Intale Shuba: To embed themselves in community in meaningful ways.

Martin Lively: They can see a direct tangible improvement, even if small, towards challenges that can seem daunting.

Gabriella Velardi-Ward: Goal in their interest. Want to improve community. Want to protect community.

Katherine Prevost: Want to improve community. Community hours.

Edwin A Hernandez: Porque los voluntarios se sienten comprometidos con nuestra misión, visión, valores y plan estratégico y sienten que su experiencia puede ser valiosa para hacer crecer nuestra organización.

Perla Orozco: Edwin: Because volunteers feel committed to our mission, vision, values and strategic plan and feel that their experience can be valuable to grow our organization.

Susan Liley Citizens' for Flood Relief De Soto MO: can beg for others. Not good at asking forme.

Louis Medina: 1) Serve on our Board of Directors

Amanda Barragar: Volunteers for upcoming event

Elizabeth Lambe: Serve or chair on committees.

Anna Schmidt: get sustaining donors at this end of year appeal.

Louis Medina: 2) Give to our Board Match for Giving Tuesday.

Perla Orozco: 1) Servir en nuestra Junta Directiva, Voluntarios para el próximo evento servir o presidir comités, conseguir donantes de apoyo en este llamamiento de fin de año.

Susan Liley Citizens' for Flood Relief De Soto MO: We have a 7 acre New prairie and a totally rebuilt pond. It leaks still it seems.

Martin Lively: Help find local flood victims willing to write a letter to FERC telling their story.

Louis Medina: 3) If you are Native American, we want you on our Diversity, Equity and Inclusion Committee.

Angela Sevin Green Life Earth Island Project: 1) volunteer for an event, help with food. 2) Assist with making flyers for events. 3) Help updating photos on website.

Perla Orozco: 2) Done a nuestra Junta Match for Giving Tuesday.
Tenemos una pradera nueva de 7 acres y un estanque totalmente reconstruido. Se filtra todavía parece. Ayude a encontrar víctimas de inundaciones locales dispuestas a escribir una carta a FERC contando su historia 3) Si eres nativo americano, te queremos en nuestro Comité de Diversidad, Equidad e Inclusión.

00:55:16 Jazzari "Jazz" Taylor: Take action: Protecting California Public Lands
- Steward/ Volunteering
- Vote
- Sign onto Representative Letters
- Donate

00:55:40 Perla Orozco: 1) ser voluntario para un evento, ayudar con la comida. 2) Ayudar a hacer volantes para eventos 3) Ayudar a actualizar fotos en el sitio web

Actúe: proteja las tierras públicas de California
- Mayordomo / Voluntariado
- Votar
- Regístrese en cartas representativas
- Donar

01:00:31 Edwin A Hernandez: Nuestros jóvenes que empezaron con nosotros en el 2017 y motivados por nuestros programas, 5 de ellos ya estan estudiando en el college y/o en la universidad y quisieramos recaudar fondos para que ellos (fellow) puedan continuar desarrollando sus capacidades a favor de nuestra comunidad, ser mentores para mas jóvenes y a la vez le servira para costear parte de sus estudios. "Win to win"

01:01:00 Perla Orozco: Edwin: Our young people who started with us in 2017 and motivated by our programs, 5 of them are already studying at college and/or university and we would like to raise funds so that they (fellow) can continue developing their skills in favor of our community, be mentors for more young people and at the same time it will help them pay for part of their studies. "win to win"

01:05:52 Tech Support: Spanish speakers please stay in the main room as we breakout. Los hispano hablantes, por favor quedarse en la sala principal mientras salimos a los breakout rooms.

01:06:02 Tech Support: Name | Role | Organization
What strategies will you implement to build your fundraising list? How does your organization approach donor cultivation? What is your organizations current fundraising priorities?
INTRODUCCIONES: Nombre | Papel | Organización ¿Qué estrategias implementará para construir su lista de recaudación de fondos? ¿Cómo aborda la captación de donantes su organización? ¿Cuáles son las prioridades actuales de su organización en cuanto a recaudación de fondos?
01:08:55 Tech Support: "Spanish speakers please stay in the main room as we breakout. Los hispano hablantes, por favor quedarse en la sala principal mientras salimos a los breakout rooms."

01:21:37 Cheryl Austin: Susan we're in the same boat. I feel you and your dedication to your family.

01:22:13 Tech Support: As we return to the main room, please re-select the interpretation channel you prefer. Go to the globe icon at the bottom of your zoom screen where it says “interpretation,” click, and choose either English or Spanish

01:22:30 Tech Support: Please private message tech support if there is anything you would like us to know or if you are having any technical issues.

01:25:19 Amanda Barragar: Speaking of CRMs. Our organization has been putting a LOT of time into researching CRMs. And still, we have no idea which one to use. Part of the problem is we don’t know what we need. But we absolutely need to begin using a better data management system at our size and growth. How do we tackle this massive hurdle?

01:25:37 Angela Sevin Green Life Earth Island Project: Same for us on CRMs

01:26:11 Susan Liley Citizens' for Flood Relief De Soto MO: I have also been volunteering to help the city with buy outs. We applied 2 weeks ago for 5 homes to be bought out.

01:26:12 Perla Orozco: Amanda: Hablando de CRM. Nuestra organización ha dedicado MUCHO tiempo a la investigación de CRM. Y aún así, no tenemos idea de cuál usar. Parte del problema es que no sabemos lo que necesitamos. Pero es absolutamente necesario que comenzemos a usar un mejor sistema de administración de datos para nuestro tamaño y crecimiento. ¿Cómo abordamos este enorme obstáculo?

01:27:21 Leah (she/her): Little Green Light

01:27:46 Elizabeth Lambe: what do you think of salesforce? The free version for non-profits?

01:28:34 Louis Medina, Friends of the Inyo, Bishop, CA: Have you heard of Salsa Labs and if so what do you think of them?

01:28:48 Angela Sevin Green Life Earth Island Project: is Little Green Light free?

01:28:55 Rose Lynn Abesamis-Bell: Flipcause?

01:29:25 Susan Liley Citizens' for Flood Reelief De Soto MO: I have also been volunteering to help the city with buy outs. We applied for buy outs for 5 homes. I was the one that chose. Last year we applied for 23 and the state
turned us down. This time we Zoomed with FEMA ofcials several times in past months.

01:30:09 Elizabeth Lambe: Salesforce has been OK for us...maybe its more than we need but we only use it for simple stuff and it’s free for non profits

01:30:18 Edwin A Hernandez: Could you provide more information about Flipcause?

01:30:58 Amanda Barragar: Little green light is tricky for us. We’re moving over that threshold of $100-$200 and growing in a way that we might outgrow that range in a year or two. So should we plan for a CRM that can accommodate us when we’re larger, or what we can use now?

01:32:25 Perla Orozco: Amanda: Little green Light es engañosa para nosotros. Estamos superando ese umbral de $100- $200 y creciendo de una manera que podríamos superar ese rango en uno o dos años. Entonces, ¿deberíamos planificar un CRM que pueda adaptarse a nosotros cuando seamos más grandes o que podamos usar ahora?

01:32:27 Martin Lively: It’s also important to know whether you have the time to invest not just while learning the program, but also to manage the data to keep the app working smoothly. This is a meaningful barrier for us to making the jump.

01:34:17 Amanda Barragar: I’d love to hear more about what an annual volunteer/donor survey would include.

01:38:11 Leah (she/her): Once a year, do a volunteer/donor survey. How they want to plug in, etc. capacity, etc. What do they want. As volunteers- connect with other volunteers? Virtual, pop up event, happy hours, etc. Camping trip in the wilderness area? Ask questions, use info to plan. When using this you would also have them update all the information (in nextslide). If we have a slack or whatsapp group – could say “join our group” Write things in the survey that respond and align with the volunteers.

01:39:53 Perla Orozco: Leah: Una vez al año haga una encuesta de voluntarios/donantes. Cómo quieren enchufar, etc. capacidad, etc. Que quieren ellos. Como voluntarios, ¿conectarse con otros voluntarios? Evento virtual, pop up, happy hours, etc. ¿Viaje de campamento en el área silvestre? Haga preguntas, use la información para planificar. Al usar esto, también les pedirá que actualicen toda la información (en la siguiente diapositiva). Si tenemos un grupo de slack o whatsapp, podría decir "únete a nuestro grupo". Escriba cosas en la encuesta que respondan y se alineen con los voluntarios.

01:48:16 Gabriella Velardi-Ward: To save the community from flooding.

01:48:35 John Trinkl: Do some good in the world.

01:48:45 Megan Killeen: I volunteer to network in the community and make new friends! Much of my work is geared toward wildfire resilience.


01:53:24 Elizabeth Lambe: COVID impacted our volunteer numbers

01:53:42 Elizabeth Lambe: we stopped doing outreach events for two years so people
01:53:43 Caroline Grauman-Boss: We have an abundance when it comes to programming and scarcity in terms of operations and fundraising.

01:54:42 Susan Liley Citizens' for Flood Relief De Soto MO: I am afraid. I want to be a small non profit. I don't want millions of dollars. My work is volunteer. I run into people trying to make money for them self off of the nonprofit.

02:02:06 Gabriella Velardi-Ward: How did you handle the 2 who didn't get along. I have that situation.

02:02:42 Angela Sevin Green Life Earth Island Project: I had a similar situation and ended up asking both to leave... very challenging.

02:10:24 Susan Liley Citizens' for Flood Relief De Soto MO: I gave them lots of chances. Then just started going on my own. I work around them. They do their thing I domine.

02:11:12 Gabriella Velardi-Ward: In the beginning of our coalition, I handed out a paper with a list of committees, every thing from writing and artwork to footwork going door to door, canvasing. I asked them to sign on to a committee that they are interested in or where their gifts are or if they want to know more about atask.

02:15:43 Tech Support: How do your volunteers feel about fundraising? How do you get volunteers to understand the importance of fundraising? How do you meet the expectations of volunteers? How do you make sure volunteers are engaged? What tasks do your volunteers do? ¿Cómo se sienten sus voluntarios acerca de la recaudación de fondos? ¿Cómo consigue que los voluntarios entiendan la importancia de la recaudación de fondos para lograr su misión? ¿Cómo cumple las expectativas de los voluntarios? ¿Cómo se asegura de que los voluntarios estén comprometidos? ¿Cómo se asegura de que los voluntarios participen? ¿Qué tareas hacen sus voluntarios?

02:15:56 Tech Support: Spanish speakers please stay in the main room as we breakout. Los hispano hablantes, por favor quedarse en la sala principal mientras salimos a los breakout rooms.

02:16:32 Susan Liley Citizens' for Flood Relief De Soto MO: Sadly, Covid happened and our last meeting was last year. I have just kept going on my own. The other co founder quit. Our advisor has stayed but it has always been about making money with her. So I just go around her. I am doing ot all wrong. I do have a board. I just keep them updated.

02:28:31 Aurora Heying: We want your feedback! Please take a moment to fill out this survey about today's session: https://forms.gle/NZJwALqtFLUQLq5y7 ¡Queremos sus comentarios! Tómese un momento para completar esta encuesta sobre la sesión: https://forms.gle/gye5yec8zAonYTLu7

02:28:33 Angela Sevin Green Life Earth Island Project: Thank you so much, very helpful!

02:28:56 Perla Orozco: The recordings and slides of all the sessions will be available on
the Rose Foundation website and emailed to registrants after the session. Las grabaciones y presentaciones de todas las sesiones estarán disponibles en el sitio web de Rose Foundation y se enviarán por correo electrónico a los inscritos después de la sesión.

02:29:02 Amanda Barragar: I’ll definitely send out a survey to our volunteers and donors.
02:29:12 Angela Sevin Green Life Earth Island Project: on the hunt for CRM, so I have a list of new ones to checkout.
02:29:23 Beth Butler: calendarizing a plan to build the plan.
02:29:37 Angela Sevin Green Life Earth Island Project: must go, thanks again!
02:29:39 Perla Orozco: Thank you everyone for joining us! We hope to see you next week.

¡Gracias a todos por unirse a nosotros hoy! Esperamos verte la semana que viene.

02:29:51 Beth Butler: merci bien!
02:29:51 Jazzari "Jazz" Taylor: Going back to the Organization Admin Team YOY program questions. What they did? Recurrences? What are the asks for volunteers? Donors?
02:29:53 Rose Lynn Abesamis-Bell (she/her/siya) Sama Sama Cooperative: One thing I will do is prepare a script for our volunteers when they are asking for support.
02:30:02 Susan Liley Citizens' for Flood Reelief De Soto MO: Thank you so very much.
02:30:15 Gabriella Velardi-Ward: Yes, thank you. This has been very helpful.
02:30:29 Perla Orozco: Jazzari: Volviendo a las preguntas del programa YOY del equipo de administración de la organización. ¿Qué hicieron? ¿Recurrencias? ¿Cuáles son las solicitudes de voluntarios? ¿Donantes?
02:30:49 Edwin A Hernandez: Actualmente DVSA no tiene voluntarios, pero como parte de nuestro plan de trabajo vamos a considerar el ingreso de voluntarios a nuestra organización para los próximos años. No tenemos experiencia, pero con la información compartida en este taller me ha servido mucho para enfocar como empezar con el proceso.
02:31:18 Jazzari "Jazz" Taylor: That’s right! Hours should include planning and commuting. 🤞
02:31:19 Perla Orozco: Edwin: Currently DVSA does not have volunteers, but as part of our work plan we will consider the incorporation of volunteers to our organization for the next few years. We have no experience, but with the information shared in this workshop it has helped me a lot to focus on how to start the process.
02:31:21 Aurora Heying: Thanks, Katherine! Great ideas
02:32:52 Perla Orozco: Thank you everyone for joining us! We hope to see you next week. We want your feedback! Please take a moment to fill out this survey about today’s session: https://forms.gle/NZJwALqtFLUQLq5y7

¡Gracias a todos por unirse a nosotros hoy! Esperamos verte la semana que viene.
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02:33:29 Cheryl Austin: Thank you. My light bulb moment was deciding on the number of volunteers, when needed and for what activity, event, or program. I though a volunteer could work in any area so I'm glad you identified the different levels and areas of work. See you next week.

02:34:39 Perla Orozco: Thank you Cheryl, Have a great weekend, see you next week

02:35:43 Susan Liley Citizens' for Flood Relief De Soto MO: I hear what you are saying but it all sounds foreign to me.

02:36:57 Susan Liley Citizens' for Flood Relief De Soto MO: I must go. Thank you.

02:37:18 Perla Orozco: Have a beautiful weekend Susan. See you next week

02:37:47 Rose Lynn Abesamis-Bell (she/her/siya) Sama Sama Cooperative: Thank you!!

02:37:57 Sophia Sady: Thanks all!!