DONOR CULTIVATION AND FUNDRAISING WITH VOLUNTEERS
SESSION #2
LEARNING OBJECTIVES

WHAT WE WILL COVER THIS SESSION:

- Review fundamentals of grassroots organizations as it relates to fundraising and volunteers
- Understand how to fundraise when you don’t know how to ask
- Review ways to build your fundraising and volunteer list
- The structure of a donor ask
- How to prepare for a donor call and create scripts
- Understand ways to engage donors and volunteers
- Volunteer recruitment, training and retention
FRAMING

How this training was developed:

- Research, best practices, experience, learning, feedback, coaching and observations

Individual Experience:

- Doctorate in Education from Pepperdine University
- Background in adult education, refugee agency & international development, leadership development programs, volunteer management and curriculum development
- Director of Nonprofit Learning Lab

30 SECOND CHECK IN: SHARE IN ZOOM GROUP CHAT

WHAT IS A FUNDRAISING SUCCESS YOU HAVE HAD THIS MONTH?
FUNDAMENTALS OF GRASSROOTS ORGANIZATIONS
FUNDAMENTALS OF FUNDRAISING

- **Donor Identification and research:** Who will you ask and what will you ask for?
- **Cultivation.** Building relationships, engaging the prospect and preparing to make the ask.
- **Solicitation:** Make the ask.
- **Stewardship:** Recognize and continue to engage donors.
GRASSROOTS ORGANIZATIONS NEED VOLUNTEERS

- To run programs
- Complete daily or monthly tasks
- Serve on leadership
- Fundraise
- Create strategy
- Run the organization
- Do and be everything!
HOW TO FUNDRAISE WHEN YOU DON’T KNOW WHO TO ASK
BUILD YOUR LIST

- Current board members
- Volunteers
- Friends of volunteers
- Community members that care about your mission
- Past donors
- Anyone that follows you on social media
- Young professionals that want connections, have time and care about your mission
Build Your List

- Seniors that want to make connections get, have time and care about your mission
- People who care about your mission
- Partner with local organizations to get volunteers
- Ask supporters to bring 1-3 other people to your next event
- Build relationships with convening organizations
- Outdoor, conservation, environmental and natural groups
HOW TO BUILD YOUR LIST

How will people find out about your organization?

- Volunteer opportunities
- Young professional groups
- People looking to engage in the community
- Partner programming
- Think about who organizes or is a convener in your county or state on this issue
THE BIGFOOT TRAIL

How to Build Your List

- Humboldt Community Resource List - May 2022
- Volunteer center of the Redwoods (VCOR)
- Latino Outdoors: Fresno and Ukiah
  https://latinooutdoors.org/
- United Way in your County
- African American Environmental Association
Action Steps to Build Your List

• Gather leadership team to generate list
• Strive to build your list every 6 months to grow your supporters, donors and volunteers
• Choose a date on the calendar every 6 months to complete this task
DONOR CULTIVATION
Donor Cultivation

- Begins after a donor makes their first gift.
- Get acquainted with your donors
- Find out what motivates them to continue giving.
- Invite donors to events and offer them opportunities to volunteer for your organization
DONOR CULTIVATION

- The process of adding new donor prospects to your solicitation list
- Motivate donors to make repeat gifts within 6-12 months
- Encourage donors to increase the size of their gifts.
- Create connections with donors and inspire them to give again.
YOU HAVE TO PREPARE FOR YOUR DONOR CALLS

ENGAGE THE DONOR

What are you going to say and share beyond asking for a donation?

BUILD

To build a relationship with your donor, you have to cultivate, steward and learn what interests them!
YOU NEED GOOD DATA TO CULTIVATE DONORS
GET BETTER INFORMATION

- Phone Numbers
- Email Address
- Birthdates
- Mailing Addresses
- Clean and update your database
- Use a database
- Does your CRM and donation platform integrate?
CHOOSE A PLATFORM

- That you will use
- That has what you need
- That you have tried out and there is buy-in to use it

**Platforms:** Fees, User ability and embed in site

- Double the Donation
- donorbox
- Qgiv
- Neon ONE
- causevox
- OneCause
- Funraise
Can you find a screenshot of a Zoom breakout room?
1. What strategies will you implement to build your fundraising list?
2. How does your organization approach donor cultivation?
3. What is your organization's current fundraising priorities?
THE STRUCTURE OF AN ASK
Have a clear ask

▪ Volunteer at community event
▪ Serve on leadership committee
▪ Donate to year end campaign
▪ Participate in trail work-day
▪ Serve on our advisory council

Ask must align with your cultivation strategy and fundraising plan
STRUCTURE OF AN ASK

Goal & Framing
We are hosting a trail clean up on October 1. We need 20 volunteers to help.

Connection
I know that you volunteered with us last year.

Ask
Would you consider volunteering and bringing 2 friends with you to volunteer?
STRUCTURE OF AN ASK

Goal & Framing
We are trying to raise $2,500 for year year end trail raise campaign.

Connection
I know that you volunteered with us last year.

Ask
Would you consider donating $25 to the campaign?
## Ask Should Align With the Person

<table>
<thead>
<tr>
<th>Young Professionals:</th>
<th>Seniors:</th>
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<tbody>
<tr>
<td>- Events</td>
<td>- Volunteer</td>
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<tr>
<td>- Volunteering</td>
<td>- Working groups</td>
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<tr>
<td>- Learn new skills</td>
<td>- Share their knowledge</td>
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<tr>
<td>- Build Connections</td>
<td>- Be part of community</td>
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[www.np4learninglab.org](http://www.np4learninglab.org)
Ask Should Align With the Person

Mid to major donors:
- Advisory Council
- Giving Circle

Community Leaders and Business Leaders:
- Honorary Committees
- Advisory Council
- Giving Circle
ALIGNMENT OF ASKS AND CULTIVATION

Your asks connect to your approach in donor cultivation, organizational capacity, who is on your fundraising list and the comfort level of your leadership in asking for donations.
WHY PEOPLE VOLUNTEER AND HOW THAT CONNECTS TO TASKS, RECRUITMENT, THE WORK AND WHY
WHY PEOPLE VOLUNTEER

Feel needed
Change of pace
Career change
Boredom
Make new friends

Share skills
Learn a new skill
Give back
Act on a passion

Required
Model good behavior
Help someone

Drop in chat: Why do you volunteer?
NOW YOU: DO A QUICK POLL

Do you ask your volunteers why they are involved?

- We ask at their initial interview
- We have never asked but should!
- We ask this info at least once a quarter
- We ask this info once a year
VOLUNTEER RECRUITMENT
NOW YOU: DO A QUICK POLL

Reflect and share in poll, your organization’s volunteer landscape

- Great abundance
- Adequate numbers
- Scarcity of Numbers & Quality
WHAT IS YOUR VOLUNTEER LANDSCAPE?

What resonates with you?

- **Great abundance:** Many qualified volunteers to help

- **Adequate Numbers:** We have enough, but we want more high performing ones that need less guidance and intervention.

- **Scarcity of Numbers & Quality:** Not enough volunteers and we take what we can get!
Make it easy for people to help you recruit

- Be clear about what you are asking volunteers to do
- Hours of commitment

- Location
- Testimonials
- What to expect
- How to sign up
- Training required
RECRUITMENT

- VolunteerMatch
- Idealist
- Sororities & Fraternities
- Volunteer Centers
- Community Fairs

- Create your Top 10 list
- Churches, Temples & Mosques
- Gather past volunteers and ask them for ideas

Go Local

- Junior League
- Chamber of Commerce
- Nextdoor
- Current and past volunteers

- Social Media
- United Way
Volunteer Recruitment

- Bring a friend day
- Bring a friend month
- Contest for who can bring the most volunteers
- Corporate volunteer days
- Determine your needs to help you get focused
- Recruit at schools, senior centers, career fairs, and community events
Volunteer Recruitment Plan

- How many volunteers do you need?
- What type of commitment do you want?
- Skills & Attributes Desired
- Target Audience
- Who is responsible for recruiting volunteers?
- Timeline
- What strategies are you going to use to recruit?
Volunteer Recruitment Plan

Skills & Attributes Desired:
- Connections to local community
- Experience planning community events
- Understands grassroots organization and capacity
- Lives in our community
- Can be anywhere since all virtual
- Can give at least 5 hours a week
- Knows how to write a press release

Brainstorm ideas with your team
REFINE STRATEGY

As volunteers flow in to support, reflect:

▪ How effective was recruitment strategy?
▪ Did we meet recruitment goals?
▪ How long did it take to recruit volunteers?
▪ What was the most effective outreach tactics?
▪ How many individuals that showed up were the right fit?
▪ Are there other areas of our program that need volunteer support?
MEANINGFUL EXPERIENCES TO MEET EXPECTATIONS
## CREATE OPTIONS FOR LEVELS OF ENGAGEMENT

### One shift opportunity:
- Habitat for Humanity
- Food Bank
- Races (5K or 10K)
- Clean up
- Trail maintenance

### Understand how quick volunteer gigs connect to the individual:
- Feeling of fulfillment for the whole year
- Loyalty to program
- Community Presence
- End goals

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What are your volunteers looking to do? What is the easiest way to engage?
SKILLS-BASED VOLUNTEERING

Tap into the knowledge and expertise of professionals:

- Marketing & Social Media
- Analytics
- Website & Graphic Design
- Copyediting
- Event planning
- Strategy
- Public Relations
- Accounting

- Easily adapts to a virtual format
BEST PRACTICES
VOLUNTEER RECRUITMENT

Reflect, How many volunteers do we need:
- Right now
- 6 months
- 1 year

Base your volunteer recruitment needs on:
- Current programs
- Future Programs
- Strategic Plan
5 MINUTE BREAK
HOW TO STRUCTURE PROJECTS
PROGRAM STRUCTURE IDEAS

- 1-hour, 2-hour, four-hour or one-day,
- activities that span different seasons
- activities that focus around particular times of the year (e.g., summer, beginning of school year, Thanksgiving, summer, Christmas, etc.)
HOW TO STRUCTURE PROJECTS

- Team-oriented activities in which working together is required
- Activities that are fun, interesting and/or different
- Activities that have tangible results
- Opportunities that allow interaction with others
HOW TO STRUCTURE PROJECTS

- Give deadlines and milestone deadlines
- Ask volunteers to share progress in an accessible way that is agreed upon
- Activities that have tangible results
- Opportunities that allow interaction with others
METHODS TO ORGANIZE VOLUNTEERS TO FUNDRAISE
HOW TO GET VOLUNTEERS TO RAISE FUNDS

- Train your volunteers
- Provides materials so they are independent
- Track progress
- Praise and thank them
- Allow for volunteer creativity based on your standards
HOW VOLUNTEERS CAN HELP ACHIEVE NEW GOALS

Volunteers work to create and generate new fundraising goals, projects and revenue.

Volunteers do not work on existing projects led by staff otherwise it is duplication of efforts.
TRAIN YOUR VOLUNTEERS

- Virtual or in person
- 1-2 times per year
- Introduction and everyone’s why
- Fundraising Goals
- Examples: what has been done in the past or what could be done
- 30 to 45 minutes
TRACK PROGRESS

- Fundraising goals are time bound
- Check in to see what is and what isn’t working
- Which volunteers are successful or need more training
- Encourage the full team to implement
- Seek new to achieve goals
PRAISE AND THANK THE TEAM

- Volunteers need praise
- Thank your volunteer during and after the efforts

- Phone call, text or notecard
- Give volunteers the recognition they deserve effort.
ALLOW FOR CREATIVITY

Allow space for volunteers to be creative

Provide guidelines

Give context to what is happening

Let volunteers implement new ideas
### EXAMPLES OF WHAT VOLUNTEERS CAN DO THAT CONNECTS TO FUNDRAISING

- Bring friends on facility tours or to volunteer
- Organize a service and donate day
- Sell tickets and sponsorships
- Send appeal letters to their network
- Make thank you calls to donors.
- Promote via social media sites.
- Plan events to raise money to their network

Volunteers should tap into their own networks of family, friends, colleagues and community.
TRAINING & SUPPORTING VOLUNTEERS

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NOW YOU: DO A QUICK POLL

Which training and resources do you provide for your volunteers:

- Orientation
- Mentor-mentee match up
- Volunteer recognition
- Ongoing training
- Feedback
- Resources to do tasks
Volunteers won’t know how to do the work unless they are oriented and trained on tasks and priorities.

Methods:

- Shared online documents
- Training
- Shared online resources
- Mentor Mentee Match Up
- Shadow roles
- Policies and procedures
ORIENTATION

Introductions
Organization history
Organization culture
Mission
Constituents
Volunteer Environment
Roles & Tasks
Practices
Policies
Organization chart
Provide Volunteer Materials and Support

Online access for accessibility:

- Nonprofit status form
- Required Policies and procedures
- Templates & Ops

Brochures
- Online materials
- Space for meeting or zoom link
- Examples of what is allowed

Examples of what is allowed
HOW TO MANAGE & SUPPORT VOLUNTEERS

Orientation for volunteers

Clear and realistic expectations for volunteers

Regular and ongoing training and development

Consistent communication

Feedback so volunteers can improve in their roles

Volunteer Recognition


MENTOR MENTEE MATCH UP PROGRAM

- To model what volunteers are expected to do
- Share knowledge and build relationships among volunteers

• Structure:

<table>
<thead>
<tr>
<th>1:1 or small group</th>
<th>Monthly meetings or check-ins</th>
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<tbody>
<tr>
<td>Phone call check-ins</td>
<td>Mentors support new volunteers</td>
</tr>
<tr>
<td>Volunteer shadow shifts</td>
<td></td>
</tr>
</tbody>
</table>
How do you meet the expectations of volunteers? How do you make sure volunteers are engaged? What tasks do your volunteers do? What is most important to your organization right now? How do your volunteers feel about fundraising? How do you get volunteers to understand the importance of fundraising in achieving your mission?
VOLUNTEER APPRECIATION LEADS TO RETENTION & IMPROVEMENT IN MORALE
NOW YOU: DO A QUICK POLL

ARE YOU “APPRECIATING” YOUR VOLUNTEERS?

- Yes
- No
- We could do it better

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WE APPRECIATE VOLUNTEERS

- So that the work continues

- Volunteer retention

- Volunteers are essential to grassroots organizations
## VOLUNTEER APPRECIATION

| ▪ Virtual party: DJ on private Zoom page |
| ▪ Gift cards to grocery stores |
| ▪ Zoom theme party |
| ▪ Hand-written note cards |
| ▪ Gift boxes for volunteers over certain hours |

| ▪ Recognize volunteer efforts on social media |
| ▪ Birthday cards |
| ▪ Text messages |
| ▪ Phone calls |
| ▪ Organization swag bag |
| ▪ Virtual Coffee Hour with a VIP |
VOLUNTEER APPRECIATION

- Pizza Party
- Coffee Break
- BBQ or grill out
- Happy Hour
- Survey your volunteers with options
- Volunteer Awards
- Digital or hard copy photo album

- Letter of recommendation
- Represent your organization at meetings
- Cover registration to a conference
- Unique mentors
- Humorous Awards
QUESTIONS?

ASK AWAY!

CLOSING TIME

• What is one thing you learned today that you will try to implement?

Share in Zoom Group Chat
Thank you

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