

# Nurture the Volunteer Fund Raising Fire

## Part I: Igniting the Fund Raising Fire

2008 National Conference on Volunteering and Service  
Atlanta, GA | June 1-3, 2008

SPONSORED BY:

Corporation for  
**NATIONAL &  
COMMUNITY  
SERVICE** 



**RESOURCE & FUND  
DEVELOPMENT**  
INITIATIVE

# Background

## Corporation for National and Community Service

Created in 1993, the Corporation for National and Community Service manages more than 1.5 million Americans annually in improving communities through service. The Corporation supports service at national, state, and local levels through:

- AmeriCorps, whose members serve with local and national organizations to meet community needs while earning education awards to help finance college or training;
- Learn and Serve America, which helps link community service and learning objectives for youth from kindergarten through college as well as youth in community-based organizations; and the
- Senior Corps, the network of programs that helps Americans age 55 and older use their skills and experience in service opportunities that address the needs of their communities. Senior Corps includes the RSVP, Foster Grandparent Program, and Senior Companion Program.

This manual is based upon training and technical assistance supported by the Corporation for National and Community Service under Cooperative Agreement No. 05TAHMD001 with:

**CAMPAIGN CONSULTATION, Inc.**  
2819 Saint Paul Street Baltimore, Maryland 21218 USA  
T.410.243.7979 F.410.243.1024  
Toll Free 1-877-243-2253  
[www.CampaignConsultation.com](http://www.CampaignConsultation.com)

## Campaign Consultation, Inc.

Founded in 1988, Campaign Consultation, Inc. works with individuals and organizations – at the local, state, national, and international levels – to advance community development, fund raising, corporate citizenship, diversity, issue advocacy, media & marketing, public policy, and organizational & business development campaigns.

Campaign Consultation, Inc. has extensive experience in helping people acquire the confidence, skills, and resources to design and advance “out of the box” strategies for goal achievement.

Since 1998, Campaign Consultation, Inc. continues to serve as the training/technical assistance provider for all areas related to resource gathering for the Corporation for National and Community Service. Campaign Consultation is currently providing technical assistance for the Resource and Fund Development Initiative as well as the Specific Learning Communities Initiative.

*Copyright © 2008  
Campaign Consultation, Inc.  
All rights reserved*

Campaign Consultation, Inc. grants permission for photocopying, for limited or internal use, by participants of training events provided by Campaign Consultation. This consent does not extend to other kinds of copying for general distribution, for advertising or promotional purposes, for creating new collective works or for resale. Requests for permission or further information should be addressed in written form to:

Director of Operations  
Campaign Consultation, Inc.  
2819 Saint Paul Street  
Baltimore, Maryland 21218  
T.410.243.7979 F.410.243.1024  
Success@CampaignConsultation.com  
www.CampaignConsultation.com

Any opinions, findings and conclusions or recommendations expressed in this material are those of the authors and do not necessarily reflect the views of the Corporation for National and Community Service. Upon request, material will be made available in alternative formats for people with disabilities.

# **Nurture the Volunteer Fund Raising Fire: Part I - Igniting the Fund Raising Fire**

Do your leadership volunteers provide enough kindling to light up public awareness and support for your mission? This session helps you ignite the fire to grow the awareness and skills of volunteer leaders to personally and publically champion your cause.

## **Learning Objectives**

By the end of his session, participants will be able to:

- Assess Project Advisory Councils and Sponsoring Organization Boards regarding the fund raising capacity that currently exists and the gaps that need filling.
- Use a tool to foster leadership volunteer leadership clarity through a “give and get” position description/agreement.
- Begin to identify tools and techniques to help volunteer leaders effectively implement their fundraising responsibility.

# **Nurture the Volunteer Fund Raising Fire: Part I - Igniting the Fund Raising Fire**

## **Trainer Background**

### **Susan Hailman Knowledge Transfer & Utilization Director**

Susan Hailman is Project Director for the Resource and Fund Development and Specific Learning Communities Initiatives for the Corporation for National Service. She has been involved in the development and evolution of the Resources Now Institute, ASK to Sustain Learning Experience and has developed the distance coaching format offered to national service programs and projects.

She has developed and delivered training and technical assistance for the Center for Substance Abuse Treatment to build its grantees' capacity to advocate and sustain their activities. Prior to joining the Campaign Consultation team, Ms. Hailman served as the Director of Training for the Enterprise Foundation. She managed a national training and technical assistance project providing services to community development and finance professionals in 123 cities throughout the country.

Before moving to the private foundation arena, Ms. Hailman served as Project Officer / Public Health Advisor for the Center for Substance Abuse Prevention. She oversaw federal alcohol / drug prevention and community partnership training contracts valued at more than nine million dollars annually. Her past experiences related to assessment, marketing, and partnership-building provide Ms. Hailman with a unique understanding of sustainability from both a government and private funding perspective.

**Michael W. Howard**  
**Senior Associate**

Michael Howard has worked as Project Specialist to the Resource & Fund Development Initiative at Campaign Consultation. He brings 20 years of fundraising and resource development experience in both human service and higher education nonprofit organizations. Fundraising experiences with nonprofit organizations include groups as diverse as The Pride of Baltimore, Inc., The Arc of Baltimore, Whitman-Walker Clinic, and US Lacrosse.

His higher education experience in resource and fund development includes institutions as varied as The University of Maryland College Park, Gettysburg College and The Johns Hopkins University. He was instrumental in the success of annual fund campaigns and major gift solicitations for multi-million dollar capital campaigns.

Michael brings a passion to the art of fundraising as he strives to help others advance in their knowledge and skills while helping donors' "hopes and dreams" become a reality for their philanthropic interest.

**Debbie Wellborn**  
**Senior Corps Field Liaison**

Debbie Wellborn is the Senior Corps Director for the Appalachian State University Senior Companion Project. Debbie has served as a Senior Companion Director since 1990. She has twenty-seven years of experience in the human services field, including 20 years working with Corporation for National and Community Service-sponsored volunteer programs.

She received a Certificate of Excellence in Nonprofit Leadership Management from the University of Wisconsin, School of Human Ecology in 1999. Debbie is a certified Administrator of Volunteers in North Carolina and a member of the North Carolina Association of Senior Corp Directors as well as the National Senior Corp Association.

# **Nurture the Volunteer Fund Raising Fire: Part I - Igniting the Fund Raising Fire**

## **Roles of Facilitators and Participants**

### **Facilitators ...**

- ... will guide participants through topic overviews and orientation to activities. They are available to clarify, coach, and provide specific technical assistance as time permits. The Facilitators will identify opportunities for follow-up activity when the workshop is completed.

### **Participants ...**

- ... are responsible for identifying their own learning needs. They are responsible for sharing their learning with other participants as requested. Participants may ask for whatever assistance they require to meet their learning objectives from facilitators or other participants.

# Nurture the Volunteer Fund Raising Fire: Part I - Igniting the Fund Raising Fire

## Agenda

**Overview** **20 min.**  
*group review/discussion*

Introductions and Participant Expectations  
Objectives and Agenda  
Reminder and Definitions  
What Volunteers Want  
What's your Fund Raising Interest?

**Incorporating Fund Raising Volunteers  
into Your Plan** **45 min.**  
*mini-teach and group exercises*

The Unique Contribution of Fund Raising Volunteers  
Responsibilities Could Include...  
    Skills Match  
    Fund Raising Volunteers Could Be...  
Position Description Worksheet  
Where to Look  
Buzz Group

**Implementing a Plan** **15 min.**  
*group review and individual exercise*

Fund Raising Volunteer Leadership-Example  
Fund Raising Volunteer Leadership-Worksheet

**Summary, Evaluations, Close** **10 min.**

# **Nurture the Volunteer Fund Raising Fire: Part I - Igniting the Fund Raising Fire**

## **Overview**

When Senior Corps projects think of “volunteers”, it is natural to automatically focus on the Foster Grandparents, Senior Companions, or RSVP volunteers.

This workshop focuses on how another pool of volunteers -- fund raising volunteers -- can be assets to your project.

In this workshop, we'll discuss how to find, attract and build the skills of the kind of volunteers you need to take on fund raising roles. Roles could include helping to shape a fund raising team or finding the individual you need to help meet your project's fund raising needs.

# **Nurture the Volunteer Fund Raising Fire: Part I - Igniting the Fund Raising Fire**

## **Introductions and Participant Expectations**

*Please share with the group:*

- Your name
- Your project
- What you would like to be able to do when you leave this session, related to using fund raising volunteers.

## Reminder and Definitions

### Reminder:

Fund raising by Senior Corps project directors is **not** a prohibited activity. Fund raising is important to keep projects solvent.

However, charging fund raising time and other costs to the federal or required non-federal share of the grant is **not** allowed.

This means that if you are SC project staff, your involvement in fund raising for your SC projects will be dictated by whether or not you have funding that is **not federal and not part of your non-federal share**. If you are 100% supported by the federal grant and non-federal share, you cannot be directly involved in fund raising for your project. In this case, you have several options which are outlined in the FAQ's at the end of this book. You should discuss your specific situation with your supervisor and with your state CNCS office.

If you are employed by the grantee organization that sponsors a Senior Corps project, Senior Corps regulations **require you to fundraise** for your project.

## Definitions:

**Program Volunteers:** Your RSVP, FGP, or SCP volunteers.  
*Remember—SCP and FGP volunteers can never fund raise!*

**Fund Raising Volunteers:** Members of the community who could identify and secure cash or in-kind resources, products or services for your project.

**Advisory Council:** Assumes the responsibility of planning, decision-making, and acting as advisor to, and supporter of, the project it serves. An Advisory Council has no fiduciary responsibilities to the organization it serves.

**Board of Directors:** A group that is legally charged with the responsibility to govern an organization and/or corporation. In a non-profit organization the Board reports to the stakeholders (rather than the stockholders) of the community served by the organization.

## What Volunteers Want

RSVP Baby Boomers contribute more hours when participating in an activity related to their specific skills and/or experiences.

Of the 62 percent of RSVP Baby Boomers who preferred using specific skills, 40 percent spent a regular amount of time volunteering each month, 21 percent volunteered for special occasions, and 39 percent volunteered with RSVP both for a regular amount of time and for special occasions.

Additionally, 93 percent of the RSVP Baby Boomers who preferred using specific skills provided services directly to clients, either face-to-face or by telephone.

*From a May 2006 survey of RSVP Boomers age 55-60 contained in **Senior Corps 2008-Value, Results, Satisfaction***

## What is Your Fund Raising Interest?

- **Special Events**  
Community outreach  
Volunteer recognition  
Fund raising
- **Marketing and Public Education**  
Education/outreach  
Newsletter (with envelope)
- **Building Business/Corporate Relationships**  
Gifts-in-kind  
Business cash gifts  
Encouraging employee volunteering  
Corporate social marketing
- **Grant Proposals**  
Corporate  
Foundation  
Other
- **Individual Giving**  
Annual Fund  
Major Donors  
Planned Gifts

# **Incorporating Fund Raising Volunteers into Your Plan**

# **The Unique Contribution of Volunteers**

- **Connections**
- **Commitment**
- **Skills**
- **Altruism**

# Volunteer Fund Raising Responsibilities Could Include...

## Special Events

- Serve on an events committee
- Sell tickets
- Negotiate space for a special event
- Write "thank you" notes

## Community Education/ Outreach

- Make presentations-public education
- Design a website
- Design a fund raising brochure
- Write/edit a newsletter
- Help set up and participate in visit

## Proposals

- Sign a cover letter
- Research a foundation
- Assist in writing a proposal

## Business/Corporate Relationships

- Ask for cash and gifts-in-kind
- Recruit corporate volunteers
- Propose corporate partnerships
- Request pro-bono professional services

## Individual Giving

- Identify new donor prospects
- Cultivate donor prospects
- Make phone calls to prospective donors
- Solicit a gift in person
- Send birthday cards to donors
- Send thank you notes
- Provide transportation and hospitality for donor site visits
- Other

## Skills Match

Record the two most vital skills you think would be necessary for a fund raising volunteer to have for the fund raising activities in the second column.

Volunteer's Skills	Fund Raising Activity
A Is a great listener	Special Events ____ ____
B Has good writing skills	Business/Corporate Relations ____ ____
C Likes to research interesting people/companies	Grant Proposals ____ ____
D Has access to people/corporations with tangible goods (land, office space, office supplies)	Individual Giving Campaign ____ ____
E Is always in the society section of the local newspaper	
F Can comfortably talk with anyone/everyone	
G Likes to borrow/barter to get things	
H Enjoys throwing parties of any size	

## Fund Raising Volunteers Could Be...

- Advisory Council Members
- Members of the sponsor organization Board of Directors
- Your own Board of Directors if you are a self-incorporated project
- Business owners and corporate employees
- Legal, financial, management or other professionals who can help with pro bono work
- Voluntary service groups who may take on fund raising for your project
- Individuals in the community who have an interest in your work and who may help connect your network with possible fund raising resources
- Students
- Past donors
- Other

# Recruiting Fundraising Volunteer Leaders

## *Position Description Worksheet*

*Volunteer leaders, Boomers and others, demand/need a clear, written description of expectations. Transfer skills and responsibilities from the previous pages and identify the name of the fundraising initiative. Fill in the missing points of information and you have just prepared a detailed position description.*

Date \_\_\_\_\_

.....  
Name ... Initiative: \_\_\_\_\_

Fundraising Volunteer Position: \_\_\_\_\_

Title of Staff Person Responsible: \_\_\_\_\_

Fundraising Volunteer Leader/Member Tasks:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Fundraising Volunteer Leader/Member Skills and Abilities:

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

Period of Time for Position: \_\_\_\_\_

Fundraising Initiative Conclusion: \_\_\_\_\_

Time required: \_\_\_\_\_ Estimated hours a week \_\_\_\_\_ Meetings a month

Other?

## Where to Look

- Local businesses and corporations
- Service clubs or civic organizations
- Business and professional associations
- Faith-based organizations
- Other nonprofit organizations
- Unincorporated organizations
- Cooperatives
- Universities and schools
- Friends of leaders and volunteers
- Other

## Buzz Group Exercise

1. Form groups of 5-8. Record on an index card your name, organization, the location and the kind of volunteer fund raiser you're looking for. Make it short and concise!

Example: I'm the director for a county wide SCP program in a rural area and I need volunteers to ask for gifts to offset the cost of our recognition event.

2. Pass the card to the person on your right. That person records 1-2 ideas of where you might find volunteers to meet your need and passes your card on to the person on their right. Each person adds their best ideas to each new card as it comes around until you get your own card back.
3. If time allows, a few folks will be asked to share with the whole group some new ideas they got from this process.

# Implementing a Plan

## Fund Raising Volunteer Leadership – Example

### Putting Your Plan to Work

*Review this example of a plan to identify and recruit a fund raising volunteer leader for a program. Follow along from left to right to track this example of an action plan.*

<b>Fund Raising Leadership Position</b>	<b>Position description</b>	<b>Supporting Criteria</b>	<b>Leadership Volunteer Mix</b>	<b>Where to Look</b>	<b>Candidate Names</b>	<b>Candidate Recruiters</b>	<b>Recruitment Steps</b>
<i>Fund Raising Event Chair – The Phantom Ball</i>	<i>The volunteer leader of the Phantom Ball is responsible for</i> <ul style="list-style-type: none"> <li>• <i>recruiting,</i></li> <li>• <i>supervising, and</i></li> <li>• <i>motivating the Team Captain.</i></li> <li>• <i>Chairing bi-weekly team meetings and making monthly reports to the Fundraising Committee.</i></li> </ul>	<i>Known in community</i>	<i>Program Volunteer</i>	<i>Local businesses</i>	<i>Tom Harris, 1<sup>st</sup> National Bank</i>	<i>Bob Wright</i>	<i>1. Nominated by fund raising team</i>  <i>2. Prioritize names</i>  <i>3. Recruit in order by committee, contact and staff.</i>  <i>4. Train and orient</i>
		<i>Able to recruit other team members</i>	<i>Local business owner</i>	<i>Kiwanis Club</i>	<i>Henri Doucette, Doucette's Diner</i>	<i>David Loris</i>	
		<i>Committed to mission</i>	<i>Donor</i>	<i>Rotary Club</i>	<i>Francis Murphy, P.A.</i>	<i>Alex Andrew</i>	
		<i>Well organized</i>	<i>Access to Funds</i>	<i>Junior League</i>	<i>Lois Burns, Junior League</i>	<i>Anne Marcus</i>	
		<i>Creative</i>	<i>Diversity</i>	<i>Chamber of Commerce</i>			
				<i>Delta Sigma Theta</i>			

# Fund Raising Volunteer Leadership – Worksheet

## Putting Your Plan to Work

*Think of your own fund raising volunteer leadership recruitment needs and use this chart to map your plan of approach.*

Fund Raising Leadership Position	Position description (tasks)	Selection Criteria (skills and pers. qualities)	Leadership Volunteer Mix	Where to look	Candidate names	Candidate Contacts	Recruitment Steps

## Closing Session

- Next Steps
- Announcements
- Evaluation
- Thank You



*“One of the Top 100 Inner City Companies in the U.S.” – Inc. Magazine/ICIC”*

# Nurture the Volunteer Fund Raising Fire

## Part II: Keeping a Healthy Blaze

2008 National Conference on Volunteering and Service  
Atlanta, GA | June 1-3, 2008

SPONSORED BY:

Corporation for  
**NATIONAL &  
COMMUNITY  
SERVICE** 



**RESOURCE & FUND  
DEVELOPMENT**  
INITIATIVE

# Background

## Corporation for National and Community Service

Created in 1993, the Corporation for National and Community Service manages more than 1.5 million Americans annually in improving communities through service. The Corporation supports service at national, state, and local levels through:

- AmeriCorps, whose members serve with local and national organizations to meet community needs while earning education awards to help finance college or training;
- Learn and Serve America, which helps link community service and learning objectives for youth from kindergarten through college as well as youth in community-based organizations; and the
- Senior Corps, the network of programs that helps Americans age 55 and older use their skills and experience in service opportunities that address the needs of their communities. Senior Corps includes the RSVP, Foster Grandparent Program, and Senior Companion Program.

This manual is based upon training and technical assistance supported by the Corporation for National and Community Service under Cooperative Agreement No. 05TAHMD001 with:

### **CAMPAIGN CONSULTATION, Inc.**

2819 Saint Paul Street Baltimore, Maryland 21218 USA

T.410.243.7979 F.410.243.1024

Toll Free 1-877-243-2253

[www.CampaignConsultation.com](http://www.CampaignConsultation.com)

## **Campaign Consultation, Inc.**

Founded in 1988, Campaign Consultation, Inc. works with individuals and organizations – at the local, state, national, and international levels – to advance community development, fund raising, corporate citizenship, diversity, issue advocacy, media & marketing, public policy, and organizational & business development campaigns.

Campaign Consultation, Inc. has extensive experience in helping people acquire the confidence, skills, and resources to design and advance “out of the box” strategies for goal achievement.

Since 1998, Campaign Consultation, Inc. continues to serve as the training/technical assistance provider for all areas related to resource gathering for the Corporation for National and Community Service. Campaign Consultation is currently providing technical assistance for the Resource and Fund Development Initiative as well as the Specific Learning Communities Initiative.

*Copyright © 2008  
Campaign Consultation, Inc.  
All rights reserved*

Campaign Consultation, Inc. grants permission for photocopying, for limited or internal use, by participants of training events provided by Campaign Consultation. This consent does not extend to other kinds of copying for general distribution, for advertising or promotional purposes, for creating new collective works or for resale. Requests for permission or further information should be addressed in written form to:

Director of Operations  
Campaign Consultation, Inc.  
2819 Saint Paul Street  
Baltimore, Maryland 21218  
T.410.243.7979 F.410.243.1024  
Success@CampaignConsultation.com  
www.CampaignConsultation.com

Any opinions, findings and conclusions or recommendations expressed in this material are those of the authors and do not necessarily reflect the views of the Corporation for National and Community Service. Upon request, material will be made available in alternative formats for people with disabilities.

# **Nurture the Volunteer Fund Raising Fire: Part II - Keeping a Healthy Blaze**

Like logs on a fire, learn how to keep the fund raising impetus going through efficient communication and support of leadership volunteers as they effectively solicit contributions on your behalf.

## **Learning Objectives**

As a result of this session, participants will be able to:

- Recruit and welcome fund raising volunteers to their organization
- Identify information, materials, training, and other resources that leadership volunteers need for effective involvement in fund raising activities
- Incorporate management processes needed for fund raising volunteers to efficiently utilize their time and expertise.
- Increase Advisory Council and grantee organization Board interest and involvement in fund raising.

# **Nurture the Volunteer Fund Raising Fire: Part II - Keeping a Healthy Blaze**

## **Trainer Background**

### **Susan Hailman Knowledge Transfer & Utilization Director**

Susan Hailman is Project Director for the Resource and Fund Development and Specific Learning Communities Initiatives for the Corporation for National Service. She has been involved in the development and evolution of the Resources Now Institute, ASK to Sustain Learning Experience and has developed the distance coaching format offered to national service programs and projects.

She has developed and delivered training and technical assistance for the Center for Substance Abuse Treatment to build its grantees' capacity to advocate and sustain their activities. Prior to joining the Campaign Consultation team, Ms. Hailman served as the Director of Training for the Enterprise Foundation. She managed a national training and technical assistance project providing services to community development and finance professionals in 123 cities throughout the country.

Before moving to the private foundation arena, Ms. Hailman served as Project Officer / Public Health Advisor for the Center for Substance Abuse Prevention. She oversaw federal alcohol / drug prevention and community partnership training contracts valued at more than nine million dollars annually. Her past experiences related to assessment, marketing, and partnership-building provide Ms. Hailman with a unique understanding of sustainability from both a government and private funding perspective.

**Michael W. Howard**  
**Senior Associate**

Michael Howard has worked as Project Specialist to the Resource & Fund Development Initiative at Campaign Consultation. He brings 20 years of fundraising and resource development experience in both human service and higher education nonprofit organizations. Fundraising experiences with nonprofit organizations include groups as diverse as The Pride of Baltimore, Inc., The Arc of Baltimore, Whitman-Walker Clinic, and US Lacrosse.

His higher education experience in resource and fund development includes institutions as varied as The University of Maryland College Park, Gettysburg College and The Johns Hopkins University. He was instrumental in the success of annual fund campaigns and major gift solicitations for multi-million dollar capital campaigns.

Michael brings a passion to the art of fundraising as he strives to help others advance in their knowledge and skills while helping donors' "hopes and dreams" become a reality for their philanthropic interest.

**Debbie Wellborn**  
**Senior Corps Field Liaison**

Debbie Wellborn is the Senior Corps Director for the Appalachian State University Senior Companion Project. Debbie has served as a Senior Companion Director since 1990. She has twenty-seven years of experience in the human services field, including 20 years working with Corporation for National and Community Service-sponsored volunteer programs.

She received a Certificate of Excellence in Nonprofit Leadership Management from the University of Wisconsin, School of Human Ecology in 1999. Debbie is a certified Administrator of Volunteers in North Carolina and a member of the North Carolina Association of Senior Corp Directors as well as the National Senior Corp Association.

# **Nurture the Volunteer Fund Raising Fire: Part II - Keeping a Healthy Blaze Roles of Facilitators and Participants**

## **Facilitators ...**

- ... will guide participants through topic overviews and orientation to activities. They are available to clarify, coach, and provide specific technical assistance as time permits. The Facilitators will identify opportunities for follow-up activity when the workshop is completed.

## **Participants ...**

- ... are responsible for identifying their own learning needs. They are responsible for sharing their learning with other participants as requested. Participants may ask for whatever assistance they require to meet their learning objectives from facilitators or other participants.

# Nurture the Volunteer Fund Raising Fire: Part II - Keeping a Healthy Blaze

## Agenda

**Overview** 10 min.  
*group review/discussion*

Introductions and New Participant Expectations  
Objectives and Agenda  
Reminder and Definitions  
What Volunteers Want

**Inviting, Welcoming and Managing** 45 min.  
*Mini-teach & Small Group Work*

The Invitation to Join  
Recruiting Fund Raising Volunteers  
Share a Success, Share a Disappointment/Insight Worksheet  
Ensure Success  
Establish a Positive Environment

**Increasing Fund Raising Interest  
on Your Advisory Council** 25 min.

Conversation with a Senior Corps Director  
Questions and Answers  
Short-term Strategies to Increase Fund Raising Interest  
on your Advisory Council  
Long-term Strategies to Increase Fund Raising Interest  
on your Advisory Council  
Focus on Satisfaction  
Appendix

**Summary, Evaluations and Close** 10 min.

# Nurture the Volunteer Fund Raising Fire: Part II - Keeping a Healthy Blaze

## Introductions and Expectations

*If you did not participate in Pt. 1, please share with the group:*

- Your name
- Your project description
- What you would like to be able to do when you leave this session related to retaining fund raising volunteers

## Reminder and Definitions

### Reminder:

Fund raising by Senior Corps project directors is **not** a prohibited activity. Fund raising is important to keep projects solvent.

However, charging fund raising time and other costs to the federal or required non-federal share of the grant is **not** allowed.

This means that if you are SC project staff, your involvement in fund raising for your SC projects will be dictated by whether or not you have funding that is **not federal and not part of your non-federal share**. If you are 100% supported by the federal grant and non-federal share, you cannot be directly involved in fund raising for your project. In this case, you have several options which are outlined in the FAQ's at the end of this book. You should discuss your specific situation with your supervisor and with your state CNCS office.

If you are employed by the grantee organization that sponsors a Senior Corps project, Senior Corps regulations **require you to fundraise** for your project.

## Definitions:

**Program Volunteers:** Your RSVP, FGP, or SCP volunteers.  
*Remember—SCP and FGP volunteers can never fund raise!*

**Fund Raising Volunteers:** Members of the community who could identify and secure cash or in-kind resources, products or services for your project.

**Advisory Council:** Assumes the responsibility of planning, decision-making, and acting as advisor to, and supporter of, the project it serves. An Advisory Council has no fiduciary responsibilities to the organization it serves.

**Board of Directors:** A group that is legally charged with the responsibility to govern an organization and/or corporation. In a non-profit organization the Board reports to the stakeholders (rather than the stockholders) of the community served by the organization.

## What Volunteers Want

A majority (96%) of RSVP Baby Boomers who preferred to use specific skills for their volunteer work planned to volunteer for an additional year.

A total of 40 percent of Baby Boomers who volunteer for RSVP were asked to volunteer by another RSVP volunteer (24%) or by someone else (16%).

Ninety-three percent of Baby Boomers who were asked by an RSVP volunteer or someone else report that they plan to remain with RSVP for another year.

*From a May 2006 survey of RSVP Boomers age 55-60 contained in **Senior Corps 2008-Value, Results, Satisfaction***

# Inviting, Welcoming and Managing

## The Invitation to Join

- Identify fund raising needs and prospects
- Draft job description and responsibilities
- Select candidates
- Personalize the invitation

# Recruiting Fundraising Volunteers

## Recruitment Plan

Key components of a recruitment plan for volunteer fundraisers include:

- A written document, approved by the advisory group, board, etc. outlining detailed recruitment steps
- A description of the plan's purpose
- Specific volunteer numbers and deadlines
- A systematic screening process
- Introductory contacts through current staff and volunteers
- Invitations to prospective volunteer fundraisers to an event
- Assigned follow-up for interested volunteers
- Regular and ongoing reporting schedules
- Written records of interactions

# Share a Success, Share a Disappointment

*Trying new things can require experimentation. Sometimes the new practice works and sometimes it doesn't. In order to try something new, it is helpful to hear what has worked, and what hasn't, for others.*

*Take 10 minutes to pair up with a peer and share the following:*

- A success story of recruiting a volunteer
- An unsuccessful volunteer recruiting attempt

*Pay close attention to what you each have to say in regard to:*

- What was your most valuable learning experience?
- How would you change your recruiting style now?
- How might lessons learned about recruiting program volunteers translate to fund raising volunteers?

## Insights Worksheet

*Use this worksheet to record the lessons of your partner's stories.*

<b>Insights from Shared Success</b>	<b>Insights from Shared Disappointment</b>

## Ensure Success

- Educate
- Train
- Coach
- Encourage/Recognize
- Provide Achievable Goals
- Build Confidence
- Build Level of Satisfaction
- Other

## **Establish a Positive Environment**

*How many of these do you have already to support your new fund raising volunteers? Check the ones you need to develop.*

- **Have a Formal Welcoming Process**
  - Draft a position description
  - Describe fund raising volunteer role to other volunteer leaders
  - Alert staff and gain their buy-in
  
- **Have a Structured Orientation Process**
  - Develop a welcome package
  - Set specific time and place to formally introduce new fund raising volunteer(s)
  - Outline staff responsibilities and structure to new volunteer(s)
  
- **Plan for Success Through Supervision**
  - Outline specific responsibilities with fund raising volunteer(s)
  - Develop timeline, as appropriate
  - Clarify supervision process and check-in points
  - Connect volunteer skills/goals with assignment
  - Offer relevant training opportunities
  - Create bonding opportunities
  - Set achievable benchmarks
  - Evaluate
  - Celebrate success
  
- **Individualize Recognition**
  - Tie recognition to motivation
  - Think through added responsibilities, perks, related tasks to keep volunteers interested

# **Increasing the Fund Raising Interest on Your Advisory Council**

# **Conversation with a Senior Corps Director**

**Debbie Wellborn  
Appalachian State University  
SCP Project Director**

## Questions and Answers

- How is your Advisory Council involved in Fund Raising?
- How did you begin?
- How is your time to do fund raising with your Council funded?
- What did your Council members do?
- What was the result?
- What's next?
- Questions from the audience?

## **Short-term Strategies to Increase Fund Raising Interest on Your Advisory Council**

- Be clear on expectations
- Be aware and flexible
- Include in planning
- Stay patient and positive
- Take small “baby” steps first
- Other

## **Long-term Strategies to Increase Fund Raising Interest on Your Advisory Council**

- Invite experts from the community to a meeting to describe successes and tips.
- Network with other projects
- Develop a list of favorite on-line resources for community organizations and fund raising for reference and inspiration.
- Report fund raising successes to entire Council and describe how they impact the mission of the organization.
- Other

## **Focus on Satisfaction:**

- Survey fund raising volunteers
- Keep records of who is doing what
- Develop a culture of evaluation
- Include a brief evaluation at the end of meetings
- Ask your volunteers to perform a self-evaluation of their experiences
- Other

# Appendix

**Frequently Asked Questions Concerning Fund Raising and  
Senior Corps Grants  
January 18, 2008**

As a result of our monitoring program, an issue of fund raising – especially as it relates to 100% grant-funded project directors – was raised as a concern. We find ourselves in a challenging situation regarding the issue of fund raising by Senior Corps Project Directors and the limitations defined in the OMB Cost Principles. Therefore, we have prepared the attached draft FAQs and would welcome any feedback you have.

We know that this causes uncertainty for our Senior Corps programs. However, we are confident that we can work with each Senior Corps grantee to navigate the changes necessary to be compliant. Corporation staff will be engaged in helping you manage this change to our practices around the use of Senior Corps grant funds for fund raising. In the meantime, please be assured that we are looking at options for assisting grantees to address this issue with the minimal possible disruption to project operations.

**BACKGROUND**

***1. What government-wide requirements apply to raising funds under our Senior Corps grant?***

Senior Corps sponsors must follow all applicable OMB Cost Principle circulars:

- [OMB Circular A-87](#) for State, Local, and Indian Tribal Governments [Located at [2 CFR, Part 225](#)]
- [OMB Circular A-122](#) for Nonprofit Organizations [Located at [2 CFR, Part 230](#)]
- [OMB Circular A-21](#) for Educational Institutions [Located at [2 CFR, Part 220](#)]

These OMB Cost Principles apply to grant programs across the Federal Government and define the type of costs that grantees may include on a Financial Status Report (FSR) as costs being charged to a federally funded grant. The cost principles implement government-wide decisions on what types of costs may not be included in federal grant-funded programs, or claimed as meeting grant match requirements.

One of the specific types of costs discussed in the Cost Principles is fund raising. Specifically, the OMB Circulars A-122 and A- 21 do not allow grant funds to be used for the costs of “organized fund raising, including financial campaigns, endowment drives, solicitation of gifts and bequests, and similar expenses incurred solely to raise capital or obtain contributions.” Circular A – 87 has a similar provision.

***2. What is the definition of grant funds?***

Grant funds are defined as federal funds and required non-federal share.

**3. *Is this a new requirement? If not, why is the Corporation raising this issue now?***

No. Organized fund raising costs have been unallowable under the OMB Cost Principles for many years. The Corporation is addressing this issue across all Senior Corps programs to ensure consistent guidance and practices in this area.

**4. *How does the disallowance of costs for “organized fund raising” under the OMB Cost Principles work?***

If the Corporation learns that an FSR includes costs for organized fund raising, those costs (as either grant charges or matching expenditures) will be disallowed.

**5. *How does the disallowance of costs for “organized fund raising” affect staff costs charged to the grant?***

Staff costs will be disallowed as charges to the grant, including required non-federal share, to the extent the time associated with those costs were spent on “organized fund raising.” This means that Senior Corps project staff whose salaries and benefits are 100 percent charged as direct costs to the federal grant may not engage in “organized fund raising” on behalf of the sponsor organization.

**ACHIEVING COMPLIANCE**

**6. *At our sponsoring organization, there is no alternative to the project director devoting some time to fund raising for the project. Is there any way this can be done in compliance with the OMB Circulars?***

Yes, by reducing the time the project director charges to the grant’s federal or required non-federal share to reflect the time he or she actually spends on fund raising activities.

For example, a project director who needs to spend 5 percent of his or her time on fund raising activities would charge 95 percent of his or her time on the budget and FSR (either as federal costs or required non-federal share). Another project staff member, who might spend 15 percent of their time writing grant applications, would allocate 85 percent of his or her time on the FSR, the other 15 percent would be paid from excess non-federal funds, or other funds available to the sponsor. You must keep appropriate time records to support your cost allocation. Making this kind of change to the budget will actually give sponsors more flexibility in managing their programs.

**7. *May costs related to “organized fund raising” for the project, such as project staff time, mailings, etc., be charged to “Excess” non-federal funds?***

Yes. The OMB circulars on allowable costs do not apply to funds that are not included in the grant as either costs to be reimbursed by grant funds or matching costs financed by the sponsor. Project sponsors are free to spend their non-federal funds that exceed the budgeted

match on anything they determine is appropriate for their project, including the costs of fund raising.

**8. *The Corporation requires a full time director, unless specifically exempted. Isn't this requirement inconsistent with guidance that project directors who engage in organized fund raising not charge 100 percent of their time to the grant?***

Those are not the same things. We encourage a full time director. While time spent on organized fund raising activities may be within the scope of a director's responsibilities, it cannot be charged to the federal or required non-federal share.

**9. *What staff activities are considered "organized fund raising" under the OMB cost principles?***

"Organized fund raising" includes all efforts to obtain funds to cover capital or operating costs, or to solicit in kind contributions. The test is the purpose of the event, not the amount of funds raised. Examples include:

- Conducting a financial campaign or endowment drive
- Soliciting specific gifts or bequests
- Applying for grants (See Question 12 regarding continuation applications for Senior Corps grants)
- Applying for support from local community foundations, such as the United Way

**10. *What staff activities will NOT be considered "organized fund raising" under the OMB cost principles?***

Senior Corps project staff may disseminate information about the project's activities, accomplishments, and outcomes, as well as provide information about the grant application, the governing regulations, and the grants terms and conditions. Even if that information is going to be used by someone else to raise funds for the program, this will not be considered "organized fund raising."

For example, project staff may:

- Negotiate a grant budget following approval of a grant application.
- Provide information about the project to a grant writer.
- Inform community organizations and leaders about the project, its activities and accomplishment and the non-federal funding requirements of the grant.
- Negotiate as part of the Memorandum of Understanding with a volunteer station for the volunteer station to provide cash and/or in-kind support for the project, so long as such contributions are not a precondition of providing the station with volunteers.
- Respond to questions or provide information to state or local governments that may decide to contribute to the cost of the program.

***11. As part of our grant-supported efforts to inform and educate the general community about project activities, may we include information about how members of the public can make donations to support the project?***

Yes. So long as the primary purpose of the activity is informing and educating the community at large, and the activity falls within the scope of the grant, it would be permissible to include information as to how interested persons can make donations. For example, it is permissible for a grantee to prepare and distribute a newsletter, or maintain a website (even though the web site includes information about how to make donations to support project activities). Another example would be an “open house” for the public to learn more about the project and what the volunteers are doing in the community. Under these circumstances the grantee could include information on how an interested person could support the project.

***12. May project staff charge time spent preparing second and third year continuation applications for their project to the Corporation to the current grant?***

Yes. This is an administrative action required by the Corporation to continue the current grant, and is not considered “organized fund raising.”

***13. May project staff who are 100 percent funded by the grant spend time writing a new three-year application (“renewal” application) for their project?***

No. The resources of the current grant cannot be used to request funds for the next grant period. This time may be charged to Excess.

***14. What are some other options available to sponsors, such as “self-incorporated” projects, who lack other resources to spend on fund raising activities?***

Other options include:

**(a) Ask members of your Board of Directors to assist:** Board members of non-profit organizations frequently play a key role in fund raising.

**(b) Use Sponsor Organization Staff:** Staff of a sponsoring organization that are not charged to the Senior Corps grant may engage in fund raising without regard to the OMB Cost Principle restrictions.

**(c) Make Use of the project Advisory Council:** As noted in Senior Corps program regulations, the membership of the Advisory Council should include people who are “capable of helping the sponsor meet its administrative and program responsibilities including fund raising, publicity, and programming for impact.” The Advisory Council can help raise both the required non-federal share and other funds. In addition, Advisory Council members can be asked to prepare renewal grant applications.

- (d) Seek Other Pro-Bono Volunteer Grant Writers:** Small nonprofits frequently are able to get pro-bono help in grant writing from community members.
- (e) Participate in United Way or other Community Wide Campaigns.** In this case, fund raising is undertaken by professionals in the community-wide organization.
- (f) Offer internships to local universities and colleges,** especially for graduate students with experience in grant writing, marketing, non-profit administration.

***15. May we count the value of fund raising volunteer time spent fund raising as an in-kind contribution to the grant?***

No. Because fund raising is not an allowable cost under the OMB Cost Principles, the value of volunteer time spent on fund raising may not be counted as an in-kind contribution to the grant.

***16. Do state funds fall within same fund raising restrictions?***

Yes, if the state funds are used as part of the required non-federal share.

***17. May we solicit gifts from participants or beneficiaries?***

No. Our statute prohibits such activities.

***18. If we already submitted a grant application that does not reflect the Cost Principles, what should we do?***

For grants already submitted to the Corporation for funding (i.e. January 01, 2008 cycle), we will make the award and work with the grantee to amend the budget. It is our expectation that all grants submitted after January 01, 2008 will reflect compliance with OMB Cost Principles as outlined in this document.

***19. What support will the Corporation provide in implementing the OMB Cost Principles?***

Corporation field staff members are available to answer any questions you might have. Also, we are developing webinars and other online courses to provide assistance.

**RSVP VOLUNTEERS**

***20. May RSVP volunteers assigned to the project to perform administrative functions engage in fund raising on behalf of their own project?***

Yes. RSVP volunteers assigned to perform administrative functions may raise resources for their projects, consistent with the approved application.

***21. May RSVP volunteers engage in fund raising on behalf of an FGP or SCP project sponsored by the same organization that sponsors their RSVP project?***

Yes. As in the case of fund raising on behalf of their own project, RSVP volunteers may raise resources for an FGP or SCP project sponsored by the same organization that sponsors their RSVP project.

***22. May RSVP volunteers who serve on the project's Advisory Council engage in fund raising in their capacity as Advisory Council members?***

Yes. One of the specific roles of Advisory Council members is to help the sponsor meet its administrative and program responsibilities including fund raising.

### **GENERAL**

***23. May a project director accept an unsolicited donation for the project on behalf of the sponsor?***

Yes. Acceptance of an unsolicited donation is not considered fund raising.

***24. May project staff charge their time and related expenses spent soliciting volunteer recognition items and/or support?***

Yes. However, time and related expenses spent soliciting volunteer recognition items can only be charged to Excess funds.

***25. As a project director, may I charge to the grant the time I spend participating in internal discussions of the project budget and presenting the case for my sponsor to allocate funds to meet the grant's non-federal funding requirement.***

Yes. Such activities are considered part of the project director's management responsibilities.

***26. May we charge to the grant staff time to attend fund raising workshops at the Corporation sponsored conferences and/or other approved conferences?***

Yes, professional development time is an allowable cost.

***27. If we have been charging certain fund raising costs, including project staff time, to the grant, what can we do to correct the situation in the future?***

You may remove those costs from the federal or required non-federal share of the grant and charge those costs to Excess.

**28. *May project staff volunteer their own time, off hours, to engage in fund raising?***

No. Project staff cannot avoid the limitation on organized fund raising by donating “off duty” time.

**29. *We are a non-Corporation funded Senior Corps project and receive no federal funds. Are we subject to the same restrictions on fund raising by staff?***

No. The OMB circulars on allowable costs do not apply projects that do not receive federal funds. However, sponsors should be sure that support that they receive from state and local sources are not “subgrants” of federal funds. Subgrants financed under a federal grant program may be subject to the OMB Cost Principles.

**30. *May we use federal funds to respond to reporting requirements of other grants supporting Senior Corps programs?***

Yes. This reporting of grant progress is not considered organized fund raising.

**31. *May we join other project directors in a consortium specifically to solicit funds for a grant?***

Yes. However, time spent on this activity cannot be charged to federal or required non-federal share.

**32. *May Senior Corps Associations fund raise for projects?***

Yes. However, time spent on this activity cannot be charged to federal or required non-federal share.

## *The Development Committee*

**The development committee has basic responsibility for overseeing and advising on the organization's fund-raising activities. Its main duties are to:**

1. Set policies, priorities, and goals for fund-raising programs for the current fiscal year
2. Review the ongoing performance of each campaign
3. Review campaign achievement versus its objectives
4. Identify and rate all major prospects for support
5. Recruit key volunteer leadership and solicitors for the organization's fund-raising campaigns.

Chairs of development committees, like development directors, must resolve the various contributed income needs of the organization without exhausting its base of support. The best development committee chairpersons are able to see the job in its entirety. They have broad vision. They don't fall in love with one fund-raising idea, campaign, or concept at the expense of the overall development effort.

My preferred development committee chairperson is a general managerial type with a strong marketing background. Ideally, this chairperson is something of an alter ego of the development director. I have been my most successful when my development chairpersons and I shared the same fund-raising vision. In a sense, the best development chairperson is a leader whom a competent development director is able to lead. The development chairperson has clout within the community that the development director is unlikely to possess, while the latter has fund-raising knowledge that is probably outside of the development chairperson's purview. The partnership between the development chairperson and the development director works best when the professional develops the ideas and then gains the agreement of the volunteer leader, who uses his or her clout to get cooperation from the board and other volunteer campaign leaders.

## Additional Resources

The Art of Trusteeship – The Nonprofit Board Member's Guide to Effective Governance, Candace Widmer and Susan Houchin, 2000.

Boards That Love Fundraising: A How-to Guide for Your Board, Zimmerman and Lehman, 2004.

Boards That Work. Douglas C. Eadie, 1994.

Creating Caring & Capable Boards – Reclaiming the Passion for Active Trusteeship, Katherine Tyler Scott, 2000.

Designs for Fund-Raising – Principles, Patterns, Techniques, Harold J. Seymour, 1966. (Out of print but worth searching for!)

Governing Boards, Cyril O. Houle, 1989.

Nonprofit Board Answer Book, Anringa and Engstrom, 1997.

Servant Leadership – A Journey into the Nature of Legitimate Power and Greatness, by Robert K, Greenleaf, 1977.

The Ultimate Board Member's Book: A 1- Hour Guide to Understanding and Fulfilling Your Role and Responsibilities, Kay Sprinkle Grace, 2005.

The Ask to Sustain National Institute, Campaign Consultation, Inc., 2002

## Closing Session

- Next Steps
- Announcements
- Evaluation
- Thank You



*“One of the Top 100 Inner City Companies in the U.S.” – Inc. Magazine/ICIC”*

Sponsored by:



**CORPORATION FOR NATIONAL AND COMMUNITY SERVICE**

1201 New York Avenue, NW

Washington, D.C. 20525

T. 202.606.5000

TTY: 202.565.2799

[www.nationalservice.org](http://www.nationalservice.org)

For more information, contact:

**CAMPAIGN CONSULTATION, Inc.**

2819 Saint Paul Street, Baltimore, MD 21218.4312 USA

T. 410.243.7979 F. 410.243.1024 Toll Free: 1.877.243.2253

[Success@CampaignConsultation.com](mailto:Success@CampaignConsultation.com)

[www.CampaignConsultation.com](http://www.CampaignConsultation.com)