



Resource  
Development



Media &  
Marketing



Collaboration



Volunteer  
Management

THE NATIONAL

ASK  
TO SUSTAIN

INSTITUTE  
*...providing Awareness, Skills, and Knowledge  
to sustain national and community service initiatives*

## OVERVIEW



PRESENTED BY:



# 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
- National Senior Service Corps (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 Retired and Senior Volunteer Program (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. 01CAMD0001 with:

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

2819 Saint Paul Street Baltimore, Maryland 21218-4312 USA

T.410.243.7979 F.410.243.1024

Toll Free 1-877-243-ABLE

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

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

[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, 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 national training/technical assistance provider for the SustainAbility Initiative for the Corporation for National and Community Service.

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Director of Operations  
Campaign Consultation, Inc.  
2819 Saint Paul Street  
Baltimore, Maryland 21218-4312 USA  
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.



## Welcome to ... The ASK to Sustain Institute

Brought to you by the Corporation for National and Community Service (CNCS), this learning experience has been designed to help you increase your Awareness, Skills and Knowledge (ASK) in the SustainAbility topics of resource development, media and marketing, collaboration and volunteer management.

The ASK curriculum features generous amounts of practical information with many opportunities to apply new ideas to your own initiative. You are encouraged to explore sustainability challenges that you have wanted to address, but have not had the time on which to focus.

As the national provider for training/technical assistance in SustainAbility for CNCS, it is a privilege for Campaign Consultation to help you garner the resources to make a difference in your community. Thank you for your time, attention and energy.

Sincerely,

*The Campaign Consultation Team*

# Overview

- Welcome
- Introduction of Team
- Review Objectives
- Who's Here?
  - ▶ Table Introductions and Expectations
- Definitions: What does Sustainability mean to you?
- Pillars of Sustainability
  - ▶ Resource Development
  - ▶ Marketing/Media
  - ▶ Collaboration
  - ▶ Volunteer Management
- Common Ground for All 4 Pillars
- Agenda for the ASK Institute
  - ▶ Sessions Offered
  - ▶ Norms for all Sessions
  - ▶ Choosing Your Topics
  - ▶ Questions

# The ASK to Sustain Institute

## Learning Objectives

### Participants will be able to:

- Analyze the strategies appropriate for increasing their program/project's sustainability and incorporate new knowledge and skills related to those elements into their sustainability plan.
- Define the importance of ongoing stakeholder development and buy-in and how buy-in advances each element of sustainability.
- Identify the impact of relevant community and national events on sustainability goals and objectives.
- Learn how to create synergy between the four strategies for sustainability
- Practice asking for what is needed.
- Identify and use tools that will advance their organization's ability to sustain itself.

# **The ASK to Sustain Institute – 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 technical assistance when The ASK to Sustain Institute 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.

## Introductions and Expectations

- Each table should choose a spokesperson, recorder and timekeeper.
- Each person should write down their own expectations for the Institute.

*My expectations for the Institute:*

- In 10 minutes, everyone at the table should introduce themselves and share their individual expectations/what they'd like to take away from the Institute.
- The Recorder should record/post all of the expectations on newsprint.
- The Timekeeper should make sure the introductions at the table are kept to 1 minute or less so that there will be time to discuss expectations.
- At the end of 10 minutes, each table will have 2 minutes to share a summary of who's at their table and the 3 expectations that were expressed most often at the table.
- The spokesperson should listen and summarize ... presenting the table to the larger group.

### **Example: a summary of participants**

*“At our table we have 3 experienced and 2 relatively new AmeriCorps directors and 2 experienced Senior Corps directors and 2 experienced Learn and Serve coordinators. Four of us come from rural communities. Five of us focus on literacy.”*

### **Example: most frequently expressed expectations**

*“Four of us are hoping to learn how to find out where we should be looking for money. Three of us are looking for ways to make our partners pay more attention to our projects and all of us hope we can figure out how to get our name out in the community more often.”*

## SustainAbility - What Is It?

Imagine: It's 2005. Your program has been highlighted for an award by the Annie E. Casey Foundation for being a "truly sustainable" community service program!

What are the key elements that President, Douglas Nelson, is going to point out about your program that have made you an example of sustainability?

*My program is a model of sustainable service programs in these ways:*

- 
- 
- 
- 
- 

*Share these elements with the other participants.*

*Based on the sharing, are there other elements that you now realize you could/should have to be truly sustainable?*

# SustainAbility

## Pillars of SustainAbility

R E S O U R C E  D E V E L O P M E N T		M E D I A  &  M A R K E T I N G		C O L L A B O R A T I O N		V O L U N T E E R  D E V E L O P M E N T
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## SustainAbility Foundation

<ul style="list-style-type: none"> <li>• <b>Develop: Vision Mission Case for Support</b></li> <li>• <b>Identify Stakeholders, Prospects, Suspects</b></li> <li>• <b>Research Prospects/Suspects</b></li> <li>• <b>Initiate Relationships with Prospects/Suspects</b></li> <li>• <b>Communicate with Stakeholders</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cultivate Relationships</b></li> <li>• <b>Create Buy-In</b></li> <li>• <b>Plan for Action</b></li> <li>• <b>Make the Ask</b></li> <li>• <b>Follow-Up</b></li> <li>• <b>Demonstrate Trustworthiness Through Accountability</b></li> </ul>
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# Stakeholders

# Who Is a Stakeholder

One of the things successful programs have in common is a network of community, partner and funder support. Programs with many invested stakeholders can weather changes in financial markets and community trends.

## **Definition:**

A stakeholder is a person (such as a volunteer, client, donor or employee) who has a special interest in the activities, target population and/or outcomes of an organization.

## **Who are your stakeholders?**

As we look at sustainability, from the perspective of Marketing, Resource Development, Collaboration or Volunteer Development, stakeholders all play a key role. We'll come back to this term in each topic.

## **The Stakeholder Cultivation Process Is a Lot like Farming...**

- ▶ One seed today does not yield a full blown, harvest tomorrow
- ▶ Cultivation takes time -  
  
Just like plants need attention, fertilization, soil aeration, stakeholders need the same care, feeding and space to move around
- ▶ Picking the fruit too early will yield an unripened result that will not be what it should be
- ▶ Patience and continued cultivation are key to spectacular results.

# What Do Stakeholders Want?

People who have a stake in something need to be offered the opportunity to contribute their opinion or input into:

How the project starts....

- ▶ What's the vision?
- ▶ Who's "at the table?"
- ▶ What methods will be used to meet the goal?
- ▶ Who's eligible?
- ▶ How and where and when are services offered?

How it expands...

- ▶ What else is needed?
- ▶ Who could provide complementary services?
- ▶ Who controls the money?
- ▶ What's said about the program to the community?
- ▶ Who gets credit?
- ▶ How is it evaluated?
- ▶ How do we know it works?
- ▶ Other?

Giving potential stakeholders the opportunity to provide input, and using that input to make the program better, builds their support or "buy-in" for your project or program. Each element of sustainability will emphasize how building opportunities for involvement from current and prospective stakeholders builds stronger ties to potential funders, partners, volunteers and to the community your project serves.

# Stakeholder Success Tips

- **Create stakeholder ownership**  
The more interested and involved stakeholders are, the more they will invest in your program or organization.
- **Seek advice**  
In addition to time, money and donated goods, stakeholders can also give you their best thinking - a contribution we tend to overlook!
- **Share Information**  
Interested and involved stakeholders know how what they do helps you fulfill your program/agency mission and vision.
- **Tap into stakeholder networks**  
When people have a good experience as your stakeholder, they will help you win new stakeholders. They may have contacts you do not.
- **Know what motivates**  
Focus on what motivates the stakeholder to invest in your program and adapt to their changing interests, needs, and availability in order to maintain a long-term relationship.
- **Show appreciation**  
Stakeholders need recognition and appreciation for their contributions.
- **Do what you say**  
Maintain integrity and accountability with your stakeholders or they'll go elsewhere.

## Purpose of the Case for Support

- ▶ attracts support for the solutions your initiative wishes to accomplish.
- ▶ builds consensus and buy-in
- ▶ increases stakeholder commitment
- ▶ attracts volunteers to fund raising, program, public policy, etc.
- ▶ builds community awareness
- ▶ researches and collects valuable community attitudes
- ▶ tests marketplace readiness

# Writing the Case for Support

- Write in the present tense as if your strategies are already reality.
- Include distinctive and innovative programs. Give supporters examples, illustrations, and case histories of organizations' success stories.
- Keep the case simple and brief. Do not drown supporters in data. All the "vital statistics" belong in the attachments.
- Highlight evidence of the planning behind the program. It shows prospects that the initiative is managed in a businesslike way.
- Anticipate questions and answer particular concerns expressed by every reader of the case statement such as other volunteers, clients, legislators, bureaucrats, business people, funders and leaders of faith.
- Be concrete and specific...do not say: "Our initiative is a model of success"; describe how it is successful, and why it is a model.
- State your goals in positive terms and relate what the organization is, rather than what it is not.

## **Attachments for Case for Support**

The case for support itself is preferably 5 - 8 pages. The following attachments may be added if they help reinforce the message.

- Leadership Lists
- Anecdotal stories, Case Studies
- Budgets
- Program/Project Plans
- Demographics
- Statistics
- 501(c)(3)
- Letters of Support
- Printed Newspaper Articles
- Recognition Opportunities
- Photographs

## Case for Support Outline Activity

1. **Mission** - *Describe why your initiative exists and the activities/services you do to achieve your vision*
2. **Achievements** - *Establish your initiative's expertise and describe its past achievements...explain its relevancy...reveal how it impacts the environment...the big picture*
3. **Problem (or opportunity)** - *Convey what needs to be addressed today... incorporate logic and emotion*
4. **Trends affecting the problem (or opportunity)** - *Demonstrate your knowledge and insight*
5. **Response to the problem (or opportunity)** - *Unfold the answer--how will your initiative respond to the need...to the trends...incorporate urgency*
6. **Needed Resources** - *Describe what you have and what you need.*
7. **Role of the prospective donor** - *Discuss how the donor can help, how you can help the donor achieve his or her goals, share possible recognition opportunities.*
8. **Summary** - *Describe how the support will meet the need, how success will be evaluated, how the situation will be addressed in the future...keep the perspective big.*

# Resource Development

# A Pillar of SustainAbility: Resource Development

<b>Methods</b>	
<p><b>Face to Face –</b></p> <ul style="list-style-type: none"> <li>• <b>One-on-One</b></li> <li>• <b>Group</b></li> </ul> <p><b>Phone –</b></p> <ul style="list-style-type: none"> <li>• <b>Volunteers</b></li> <li>• <b>Tele-marketers</b></li> </ul> <p><b>Mail –</b></p> <ul style="list-style-type: none"> <li>• <b>Personalized Letters</b></li> <li>• <b>Direct Mail Packages</b></li> </ul> <p><b>TV/Radio –</b></p> <ul style="list-style-type: none"> <li>• <b>Public Radio Membership Campaigns</b></li> <li>• <b>Public TV Auctions</b></li> <li>• <b>National Organizations, such as the Red Cross</b></li> </ul>	<p><b>Internet –</b></p> <ul style="list-style-type: none"> <li>• <b>Mainly Utilized by Large, National Organizations to Solicit Donations</b></li> </ul> <p><b>Special Events –</b></p> <ul style="list-style-type: none"> <li>• <b>Benefit Dinners/Dances, etc.</b></li> <li>• <b>Walk-a-thons, Raffles, Auctions</b></li> </ul> <p><b>Grant Proposals –</b></p> <ul style="list-style-type: none"> <li>• <b>Foundations - Community, Family, or National</b></li> <li>• <b>Government - Federal, State, Local</b></li> <li>• <b>Corporate</b></li> </ul> <p><b>In-Kind Donations –</b></p> <ul style="list-style-type: none"> <li>• <b>Equipment, Facilities, Project Materials</b></li> <li>• <b>Loaned Professional Staff or Services (accounting, promotional design)</b></li> </ul>
<b>SustainAbility Foundation</b>	
<ul style="list-style-type: none"> <li>• <b>Develop: Vision Mission Case for Support</b></li> <li>• <b>Identify Stakeholders, Prospects, Suspects</b></li> <li>• <b>Research Prospects/Suspects</b></li> <li>• <b>Initiate Relationships with Prospects/Suspects</b></li> <li>• <b>Communicate with Stakeholders</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cultivate Relationships</b></li> <li>• <b>Create Buy-In</b></li> <li>• <b>Plan for Action</b></li> <li>• <b>Make the Ask</b></li> <li>• <b>Follow-Up</b></li> <li>• <b>Demonstrate Trustworthiness Through Accountability</b></li> </ul>

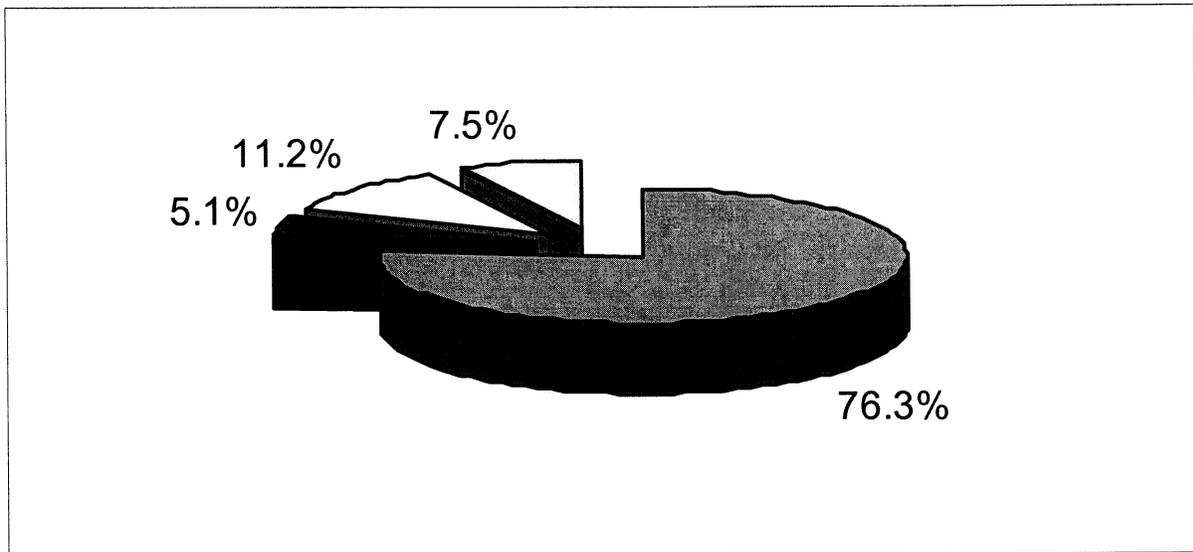
# The Giving Pie - 2002

## \$240.92 Billion

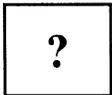
Record which group contributes what percentage of the U.S. Giving Pie.

Corporations  
 Foundations

Bequests  
 Individuals



Source: Giving USA 2003 - AAFRC Trust for Philanthropy



**Take a guess at the current funding mix at your organization among corporations, foundations and individual private sector funders.**

## The Giving Pie - 2002

Source of giving, percentage and total dollars of support:

*	Individuals	76.3%	\$183.73	billion
*	Foundations	11.2%	\$ 26.90	billion
*	Bequests	7.5%	\$ 18.10	billion
*	Corporations	5.1%	<u>\$ 12.19</u>	billion
		<b>TOTAL</b>	<b>\$240.92</b>	<b>Billion</b>

- As has been the case since 1959, living individuals gave more than three-quarters of the total of charitable contributions.
- Giving by living individuals and their estates amounted to \$183.73 billion, which equals 76.3% of total 2002 contributions. This is roughly the same amount of money Americans spend on gasoline and oil each year.
- The remaining 16.3% of private contributions is donated by foundations (11.2%) and corporations (5.1%).

Since 1987, giving by ...

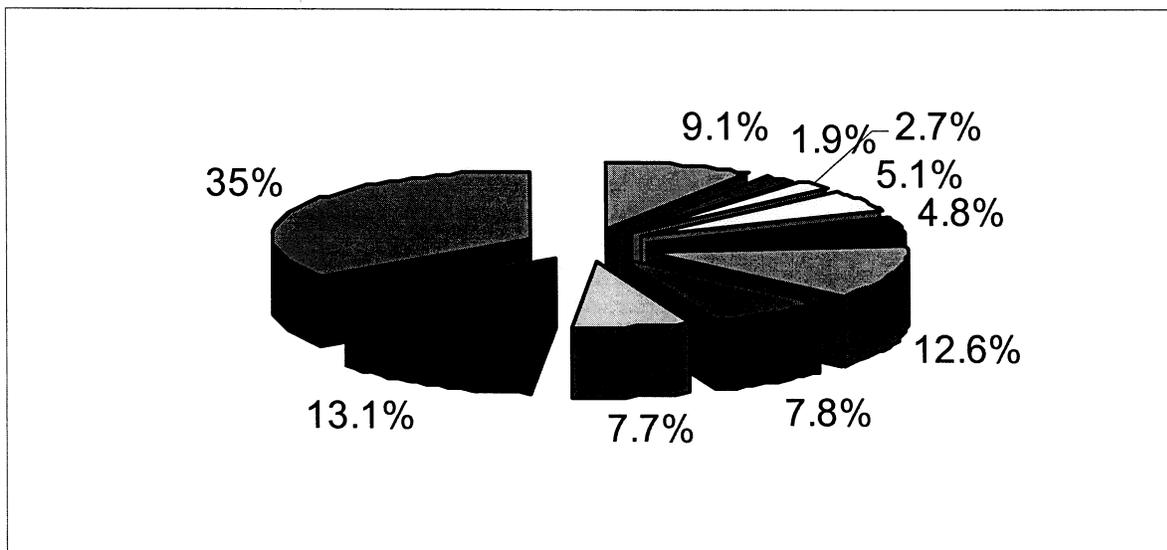
- living individuals has decreased by 6.2%
- bequests has increased by 1.32%
- foundations has increased by 5.39
- corporations has remained the same

*Any theories as to why?*

# The Receiving Pie - 2002

These sectors received a percentage of all contributions in 2002. Match the percentages shown below with the appropriate pie slices.

- |                            |                               |
|----------------------------|-------------------------------|
| ___ Health                 | ___ Human Services            |
| ___ Gifts to Foundations   | ___ Arts, Culture, Humanities |
| ___ Public/Society Benefit | ___ Environment/Wildlife      |
| ___ Religion               | ___ International Affairs     |
| ___ Education              | ___ Unallocated giving        |



Source: Giving USA 2003/ AAFRC Trust for Philanthropy



How could you use information from the Receiving Pie to more effectively attract support for your cause?

## The Receiving Pie- 2002

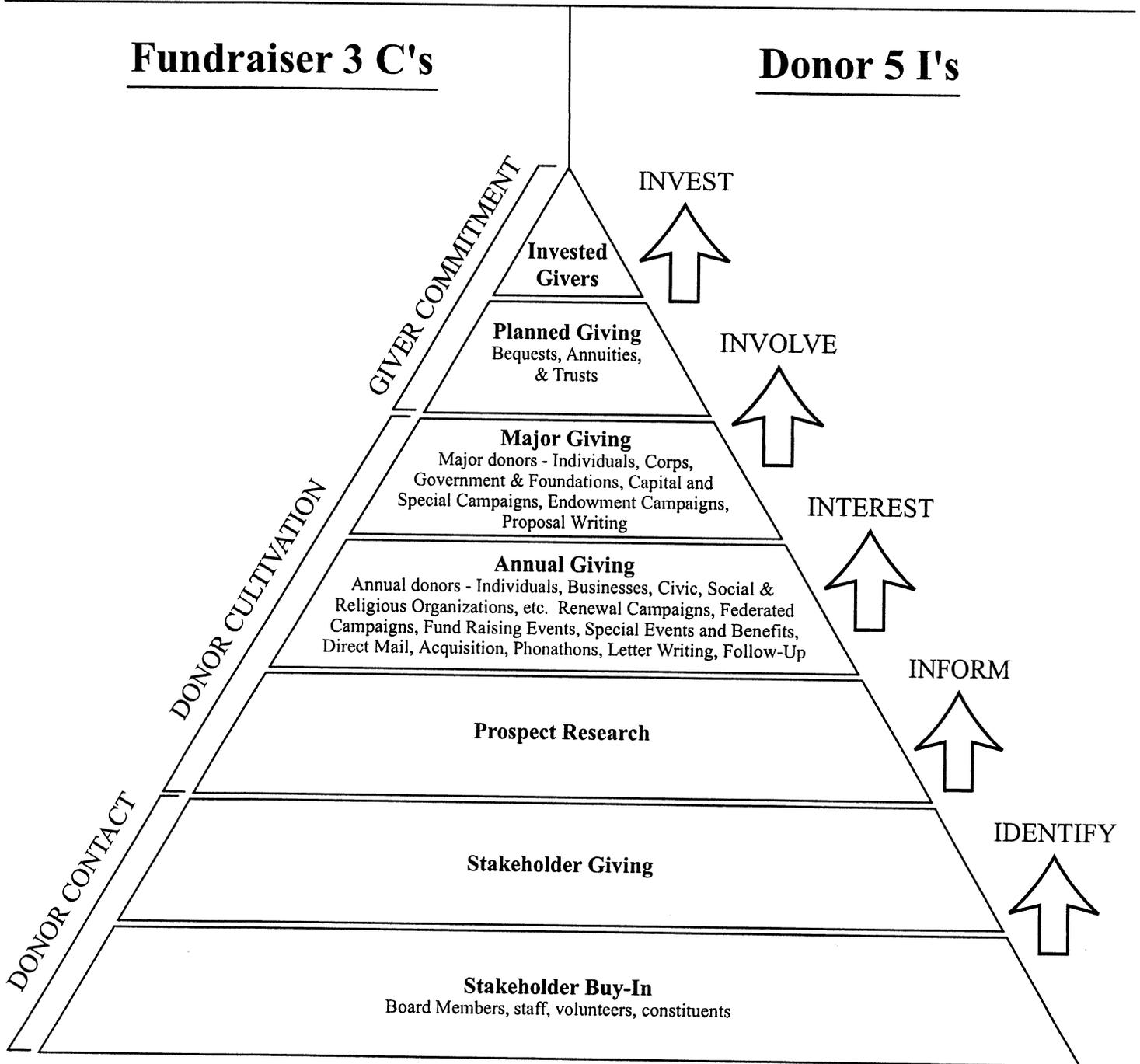
### \$240.92 Billion in contributions by type of recipients:

✓	Religion	35.0%	\$84.28 billion
✓	Education	13.1%	\$31.64 billion
✓	Gifts to Foundations	9.1%	\$22.00 billion
✓	Human Services (recreation, housing, public safety, disaster relief, youth development emergency assistance, etc.)	7.7%	\$18.65 billion
✓	Health	7.8%	\$18.87 billion
✓	Arts, Culture, Humanities	5.1%	\$12.22 billion
🍷	Public/Society (federated giving entities, public safety, disaster relief, youth development, emergency assistance, etc.)	4.8%	\$11.60 billion
🍷	Environment/Wildlife	2.7%	\$ 6.59 billion
✓	International Affairs	1.9%	\$ 4.62 billion

Since 1998, gifts received by:

- Religion dropped 8.6%
- Health decreased by 1.9%
- International Affairs showed the only increase of 0.7%

# Fundraiser/Donor Pyramid



## FUNDRAISING & RESOURCE GATHERING METHODS

# **Techniques To Maximize Resources**

Different from restricted grant writing, annual unrestricted operating support usually originates from individual givers who will donate indefinitely year after year as long as they are cultivated and contributions are used according to mission.

These four fund raising techniques are examples of raising unrestricted operating support for an initiative often as part of an organization's annual giving campaign. These techniques offer stakeholders different opportunities for involvement at various levels of commitment as described below:

## **◆ IN-PERSON SOLICITATION**

The most successful form of solicitation that is likely to yield the highest dollar result is person-to-person solicitation. In person solicitation requires research, relationship, cultivation, follow-up and patience. It is reserved for prospects with abilities to give at higher levels of giving since it is time intensive work.

## **◆ WRITING**

Another fund raising method to a successful annual fund campaign is through writing letters for mailing often called annual giving or direct mail. There is a slight distinction between annual giving and direct mail. Annual giving letters usually target people who have given before to an initiative. Direct mail letters target people who have never given. Both fund raising methods represent the solicitation of funds by mass mail, reaching many people for smaller levels of giving.

◆ **TELEPHONE MARKETING**

Often referred to as phonathons, these telephone campaigns represent an organized effort by a group of volunteers to communicate with a large number of constituents. Telephone calls present opportunities to share information, get stakeholders' input and appeal for funds, activism or other support. Phonathons are excellent ways to reinforce volunteer support while following up to a mail appeal.

◆ **EVENT SOLICITATION**

Special events are an excellent way to gain annual corporate support, build the volunteer network, acquaint many people at once with your program, attract media attention and raise some net revenue. Participants will require cultivation regarding why they should give additional annual operating support especially if their first introduction was through an event which is usually unrelated to the initiative's mission.

?

**Which of the four annual unrestricted support solicitation techniques is the most expensive? Why?**

# Media & Marketing

# A Pillar of SustainAbility: Media & Marketing

Methods	
<p><b>Presentations –</b></p> <ul style="list-style-type: none"> <li>• <b>Community Organizations</b></li> <li>• <b>School Groups–classes, PTA’s</b></li> <li>• <b>Fraternal and Civic Organizations</b></li> <li>• <b>Potential and Current Funders</b></li> <li>• <b>Decision and Policy-Makers</b></li> </ul> <p><b>Interviews –</b></p> <ul style="list-style-type: none"> <li>• <b>Live - Press Conference</b></li> <li>• <b>Television</b></li> <li>• <b>Radio</b></li> </ul>	<p><b>Print Vehicles –</b></p> <ul style="list-style-type: none"> <li>• <b>Brochures</b></li> <li>• <b>Annual Reports</b></li> <li>• <b>Flyers</b></li> <li>• <b>PSA’s</b></li> <li>• <b>Billboards</b></li> <li>• <b>Newspaper/magazine articles</b></li> <li>• <b>Press releases</b></li> <li>• <b>Letters to the Editor</b></li> </ul> <p><b>Managing the Media –</b></p> <ul style="list-style-type: none"> <li>• <b>Assess What’s Newsworthy</b></li> <li>• <b>Reporters, Publishers, Editors</b></li> <li>• <b>News Release/Press Conference</b></li> </ul>
SustainAbility Foundation	
<ul style="list-style-type: none"> <li>• <b>Develop:    <b>Vision</b>                   <b>Mission</b>                   <b>Case for Support</b></b></li> <li>• <b>Identify Stakeholders, Prospects, Suspects</b></li> <li>• <b>Research Prospects/Suspects</b></li> <li>• <b>Initiate Relationships with Prospects/Suspects</b></li> <li>• <b>Communicate with Stakeholders</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cultivate Relationships</b></li> <li>• <b>Create Buy-In</b></li> <li>• <b>Plan for Action</b></li> <li>• <b>Make the Ask</b></li> <li>• <b>Follow-Up</b></li> <li>• <b>Demonstrate Trustworthiness Through Accountability</b></li> </ul>

## The Six “P’s” of Marketing

Marketing is more than advertising, promotion or sales. These are all functions of marketing, a part of the marketing mix. Marketing is an *exchange* of something of value for something you need.

Marketing is a process - a way of looking at your organization - that begins as you plan for programs, projects, or initiatives.

- **Public:** Who are the people you are trying to reach? Who will attend your program, use your service, or try your product?
- **Product:** What is it that you offer? What is it that your key publics need, want, or is of value to them?
- **Price:** What does it cost them to get it, not just in terms of money, but also in terms of time and effort?
- **Place:** Can the public easily get to what you offer? Is it convenient?
- **Production:** Can you meet the demand?
- **Promotion:** What are the best ways to get the word out to your key publics - the *target audience* for your message - regarding your project, services, products?



**Which of the Ps is the most challenging for you and your group?**

# Promotion, Publicity, Public Relations & Marketing

- Promotion is an elephant wading down the street carrying a sign that says “Good Works: Rebuilding Anytown One Neighborhood at a Time”.
- Publicity is if there is a photo or a news story about the elephant with the sign in the news media.
- Public relations is having to deal with the mayor after the elephant crashes into City Hall.
- Marketing is having planned it all, and having people ready to take calls, answer questions, and motivate people to act.

## **Mission: Current, Clear, Compelling**

- What is your project's mission?
- Who are your project's key publics?
- Is your mission clear to those key publics? How do you know?
- Is it compelling to the target audience? How do you know?

## Conclusion

Marketing is a process - a way of looking at your organization - that begins as you plan for programs, projects, or initiatives.

In the marketing process, you work to create the best possible fit between what you are offering (the product) and the public you hope to attract. The last step of the process is promotion, through which you let the public know that you have what they want or need, so that they will take appropriate action: use your services, support your efforts, volunteer their time.

The marketing workshops assumes that you have a clear idea of the products and services that your project provides (and that as you develop new initiatives, you will be conscious of the marketing process). The skills clinics will help you to:

- Become clearer about your project's key publics, constituents, stakeholders, and audiences.
- Identify the messages that you need to communicate to motivate them to take action (for example, participate, use your service, volunteer, give money, collaborate).
- Consider ways to deliver the message effectively, clearly, concisely - through the media, through presentations, and through promotional materials.
- Develop ways to achieve your marketing image and action goals.

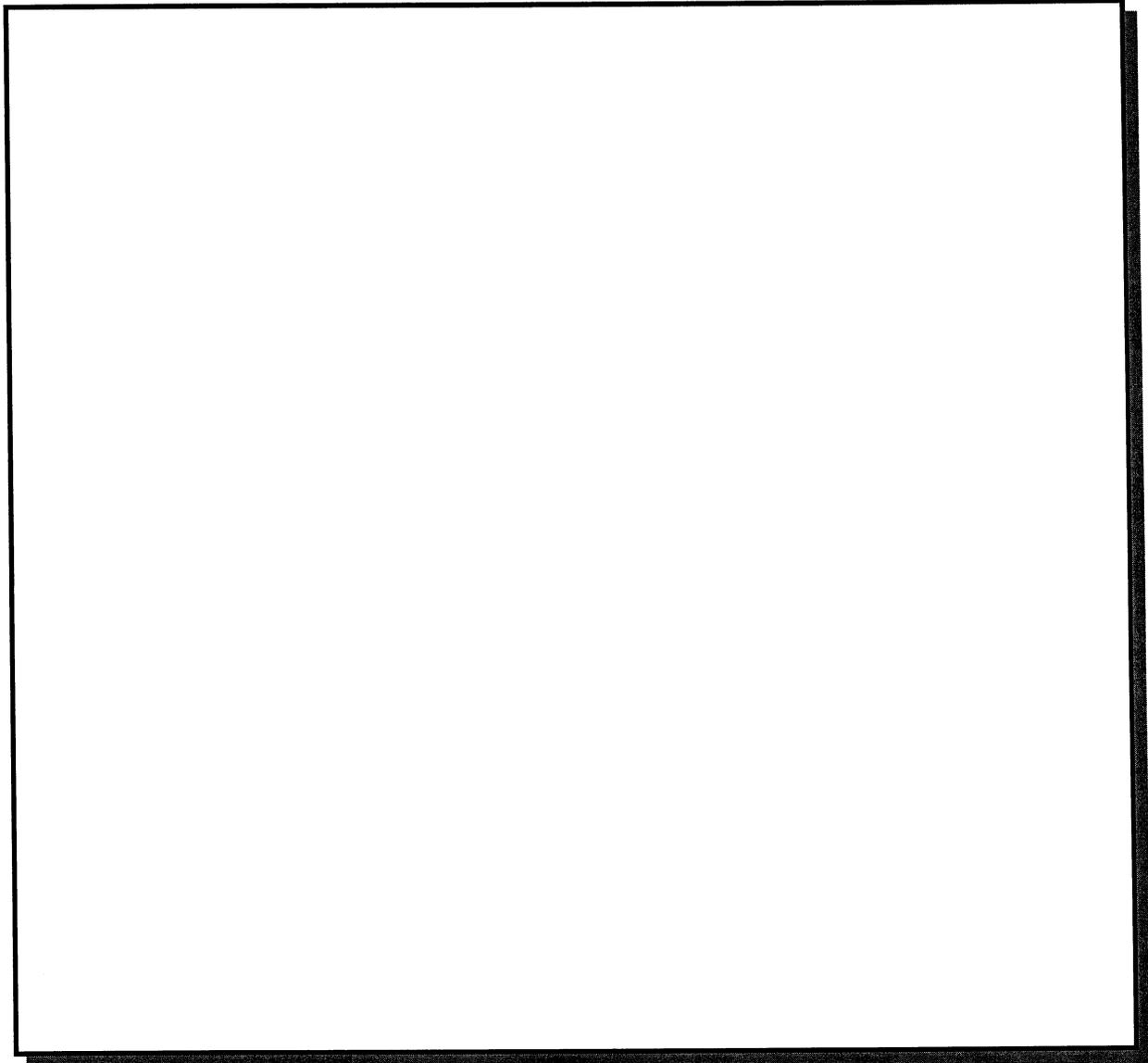
# Collaboration

# A Pillar of SustainAbility: Collaboration

Methods	
<p><b>Mapping the Environment –</b></p> <ul style="list-style-type: none"> <li>• <b>Set Goals</b></li> <li>• <b>Identify and Include Stakeholders</b></li> <li>• <b>Develop a Strategy</b></li> <li>• <b>Form a Partnership</b></li> </ul> <p><b>Engage Partners –</b></p> <ul style="list-style-type: none"> <li>• <b>Enlist Skilled Convener</b></li> <li>• <b>Craft an Effective Agenda</b></li> <li>• <b>Consider Cultural Differences</b></li> <li>• <b>Create Mechanisms for Regular Communication and Prioritize Tasks</b></li> <li>• <b>Facilitate from the Back of the Room</b></li> </ul>	<p><b>Outreach –</b></p> <ul style="list-style-type: none"> <li>• <b>Identifying Gaps</b></li> <li>• <b>Make Your Case Known</b></li> <li>• <b>Establish Common Goals</b></li> <li>• <b>Create a Network of Support</b></li> </ul> <p><b>Maintaining Momentum –</b></p> <ul style="list-style-type: none"> <li>• <b>Revision with Partners to Re-Assess Needs</b></li> <li>• <b>Review Decision Making Processes</b></li> <li>• <b>Overcome Challenges</b></li> <li>• <b>Identify Power Dynamics and Hidden Agendas</b></li> <li>• <b>Resolve Conflicts</b></li> <li>• <b>Evaluate Outcomes</b></li> <li>• <b>Celebrate Success</b></li> </ul>
SustainAbility Foundation	
<ul style="list-style-type: none"> <li>• <b>Develop: Vision Mission Case for Support</b></li> <li>• <b>Identify Stakeholders, Prospects, Suspects</b></li> <li>• <b>Research Prospects/Suspects</b></li> <li>• <b>Initiate Relationships with Prospects/Suspects</b></li> <li>• <b>Communicate with Stakeholders</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cultivate Relationships</b></li> <li>• <b>Create Buy-In</b></li> <li>• <b>Plan for Action</b></li> <li>• <b>Make the Ask</b></li> <li>• <b>Follow-Up</b></li> <li>• <b>Demonstrate Trustworthiness Through Accountability</b></li> </ul>

# Collaboration

How does collaboration make National and Community Service programs more sustainable?



## Why Collaborate?

- The complexity of today's social problems requires a broad range of expertise and insights.
- It encourages creative strategies for goal achievement.
- Collaborative campaigns encourage each segment of the community affected by the priority issue to "own" the problem, the strategies, and the solution.
- The resources and skills required to respond to the inter-relationship of today's social problems cannot be accumulated nor exercised by just one group or sector.
- Policies, practices, and systems -- which contribute to or reinforce today's critical social concerns -- often cannot be influenced by one special interest, but can and do change by the actions of many individuals and organizations working together for a common agenda.

# Levels of Collaboration

**Communication**

Activity that has as its purpose sharing of information and non-material resources.

**Coordination**

Activity between two or more agencies or organizations that has as its purpose prevention of duplication of efforts and assurance of provision of service.

**Cooperation**

Activity between two agencies or sectors that aims at some integration of operations, while not sacrificing the autonomy of either party.

**Collaboration**

A mutually beneficial and well-defined relationship which involves people from different agencies or sectors of the community joining together to achieve a common goal. Usually, that goal could not be achieved as efficiently (or at all) by any individual organization.

The result is a highly shared endeavor in which members eventually commit themselves as much to the common goal as to the interests of their own organizations.

## **Collaboration Is the Art of...**

...identifying what you have to offer and what skills or resources would be complementary, finding people with consistent values and interests and creating a process that's engaging enough to secure their commitment to reaching a mutually beneficial goal.

The collaboration sessions will help you:

- Identify opportunities and challenges in your environment to collaboration.
- Network efficiently to find the best possible partners and the appropriate level of collaborative activity.
- Create processes that keep partners engaged and committed.
- Overcome a variety of obstacles to collaboration break-downs.

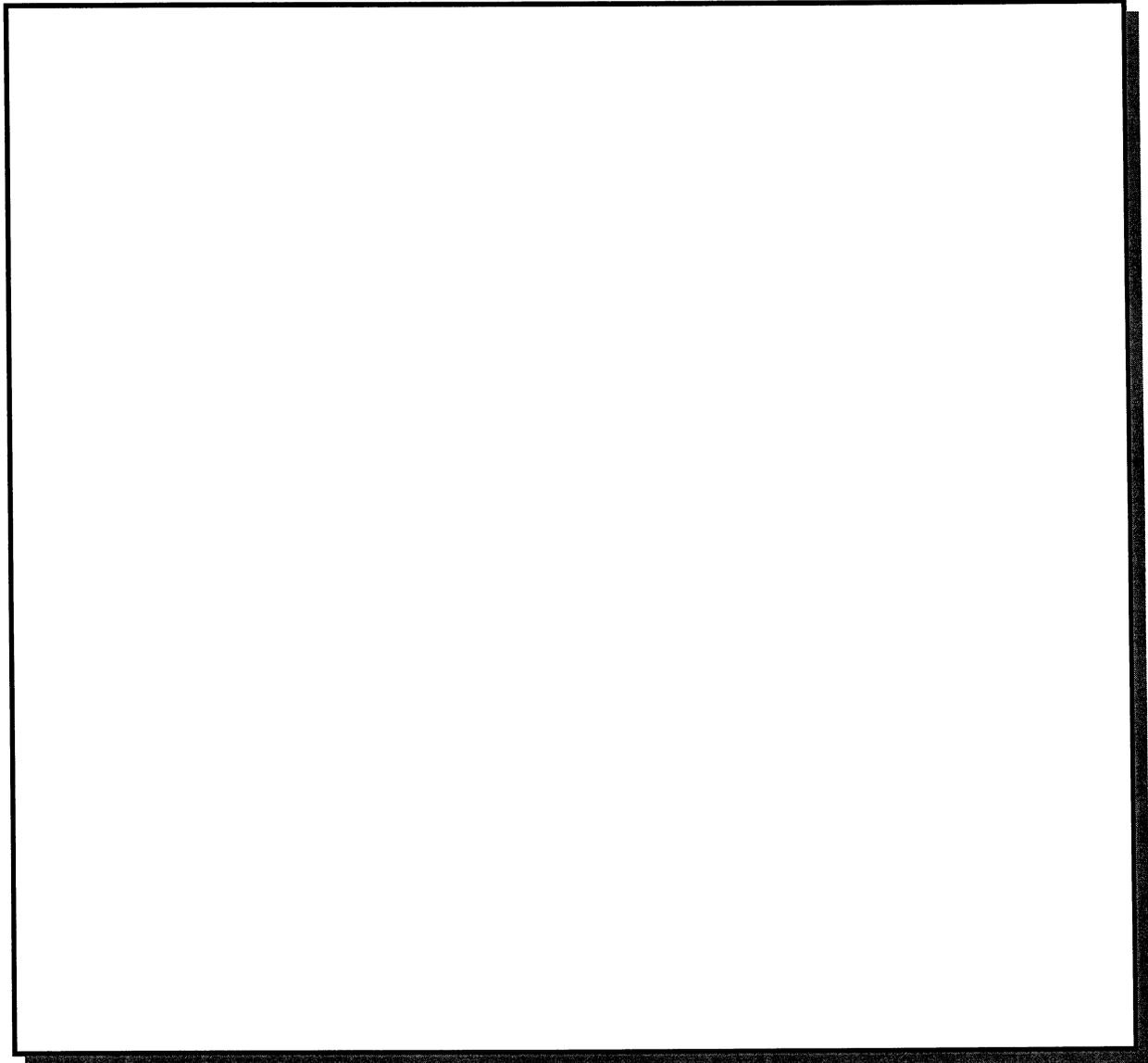
# Volunteer Management

# A Pillar of SustainAbility: Volunteer Management

Methods	
<p><b>Preparing for Volunteers –</b></p> <ul style="list-style-type: none"> <li>• <b>Organizational Needs</b></li> <li>• <b>Buy-in</b></li> <li>• <b>Job Descriptions</b></li> <li>• <b>Policies and Procedures</b></li> <li>• <b>Orientation Planning</b></li> </ul>	<p><b>Retaining Volunteers –</b></p> <ul style="list-style-type: none"> <li>• <b>Volunteer Development</b></li> <li>• <b>Tying Rewards to Motivation</b></li> <li>• <b>Supervision and Evaluation</b></li> </ul>
<p><b>Finding the Right Volunteers –</b></p> <ul style="list-style-type: none"> <li>• <b>Broadcast Recruiting</b></li> <li>• <b>Targeted Recruiting</b></li> <li>• <b>Ongoing Opportunities</b></li> <li>• <b>Episodic Opportunities</b></li> <li>• <b>National Service Program</b></li> <li>• <b>Recruiting Groups v. Individuals</b></li> <li>• <b>Recruiting Volunteers through Partnerships</b></li> <li>• <b>Corporate Volunteers</b></li> </ul>	<p><b>Building Champions –</b></p> <ul style="list-style-type: none"> <li>• <b>Board Members/Advisors</b></li> <li>• <b>Speakers Bureau</b></li> <li>• <b>Advocates</b></li> <li>• <b>Ambassadors</b></li> <li>• <b>Fundraisers</b></li> <li>• <b>Celebrity Champions</b></li> </ul>
SustainAbility Foundation	
<ul style="list-style-type: none"> <li>• <b>Develop: Vision Mission Case for Support</b></li> <li>• <b>Identify Stakeholders, Prospects, Suspects</b></li> <li>• <b>Research Prospects/Suspects</b></li> <li>• <b>Initiate Relationships with Prospects/Suspects</b></li> <li>• <b>Communicate with Stakeholders</b></li> </ul>	<ul style="list-style-type: none"> <li>• <b>Cultivate Relationships</b></li> <li>• <b>Create Buy-In</b></li> <li>• <b>Plan for Action</b></li> <li>• <b>Make the Ask</b></li> <li>• <b>Follow-Up</b></li> <li>• <b>Demonstrate Trustworthiness Through Accountability</b></li> </ul>

# Volunteer Development

How can developing your volunteer program, finding new roles for volunteers and using volunteers as “champions” for your program make your National and Community Service program more sustainable?



## “Volunteer Profile Quiz”

Check the correct answers / options:

### **An estimated...**

- 15 million people in the United States ...
- 26 million people in the United States ...
- 93 million people in the United States ...
- 109 million people in the United States ...

### **volunteer, giving an average of ...**

- 1.3 hours a week ...
- 2.7 hours a week ...
- 3.5 hours a week ...
- 4.2 hours a week ...

### **for a total of ...**

- 5.3 billion hours ...
- 8.5 billion hours ...
- 15.4 billion hours ...
- 19.9 billion hours ...

### **of volunteer time each year.**

## Cool Facts

- 109.4 million people in the United States volunteered an average of 3.5 hours a week for a total of 19.9 billion hours over the year\*
- 56% of American adults volunteer annually\*
- 90% of people who were asked to volunteer actually did\*
- 43% of seniors aged 75 and over volunteered\*
- 46% of Hispanics volunteered - an increase of 6 percentage points since 1995 (40%)\*
- 47% of African-Americans volunteered - a 12 percentage point increase since 1995 (35%)\*
- 47.1% of volunteers have a high school education or less\*\*
- 28.7% of volunteers have incomes under \$20,000\*\*
- Young people -- those age 14-17 -- contribute more volunteer time than any other age group\*\*\*
- 28% of all volunteers live in towns with populations under 2,500\*\*\*\*

Sources:

\**Giving and Volunteering, Independent Sector, 1999*

\*\**"Volunteer Trends for 1993," Vol. II, 1994*

\*\*\**Bracht, N., Citizen Participation in Community Health: Principles for Effective Partnerships, World Health Organization, Geneva, 1989*

\*\*\*\**Gallop Poll, "Americans Volunteer," 1983-1984*

## Discuss



In what way do these “Cool Facts” relate to and impact your organization?

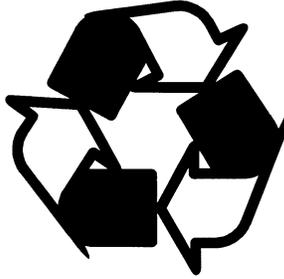
Based on these facts what should you consider doing more of and what should you consider changing in order to improve your organization?

## Hot Trends

- ① One-day, volunteer projects give busy people a way to serve their communities in brief but intense bursts.
- ② Disenchantment with traditional models of volunteer “management” results in more flexible models of *encouraging* participation by a wide spectrum of volunteers.
- ③ For-profit endeavors blur the boundaries of not-for-profit services but still legitimately involve volunteers in direct client/ patient/ resident care.
- ④ Cyberspace! Use of the Internet to reach recruit, activate and keep volunteers connected.
- ⑤ Cyberspace, again! Use of “virtual volunteering” -- thereby adding to the sum total of volunteer activity.
- ⑥ Welfare reform ... results in an increase in community service activity by recipients of public assistance.
- ⑦ The growing search for spiritual meaning ... results in a growing search for service opportunities.
- ⑧ Colleges and universities, especially community colleges, are offering workshops, non-credit courses, and certificate programs in volunteer management.

*Source: Susan Ellis, President, Energizer, Inc., in Volunteerism: Trend Watch (Fall/95).*

## Discuss



In what way do these trends relate to and/ or have an impact on your organization?

Based on these trends what should you consider doing more of and what should you consider changing in order to improve your organization?

## Themes of SustainAbility Training

- Increase **stakeholders'** connection and involvement continually.
- **Market your program** at every opportunity.
- Craft your **case for support** to generate sustainability options.
- **Build partnerships** in new arenas.
- Develop organizational capacity through **volunteer involvement**.

Think like an entrepreneur.

When you learn something new, take action.

ASK for what you need.

## The ASK to Sustain Institute: Agenda Over 2 Days

Day 1	Day 2
<p>AM</p> <p style="padding-left: 40px;">Overview</p> <p style="padding-left: 40px;">Break</p> <p style="padding-left: 40px;">Learning Session I</p> <hr style="border: 0.5px solid black;"/> <p style="text-align: center; padding: 5px;">Lunch</p> <hr style="border: 0.5px solid black;"/> <p>PM</p> <p style="padding-left: 40px;">Learning Session II</p> <p style="padding-left: 40px;">Break (will occur during learning session)</p> <p style="padding-left: 40px;">Closing Session</p> <hr style="border: 0.5px solid black;"/> <p style="text-align: center; padding: 5px;"><i>Trainers and Host De-brief</i></p>	<p>AM</p> <p style="padding-left: 40px;">Opening Day 2</p> <p style="padding-left: 40px;">Learning Session III</p> <p style="padding-left: 40px;">Break (will occur during learning session)</p> <hr style="border: 0.5px solid black;"/> <p style="text-align: center; padding: 5px;">Lunch</p> <hr style="border: 0.5px solid black;"/> <p>PM</p> <p style="padding-left: 40px;">Learning Session IV</p> <p style="padding-left: 40px;">Break</p> <p style="padding-left: 40px;">Action Planning Session</p> <p style="padding-left: 40px;">Evaluations</p> <p style="padding-left: 40px;">Closing Session</p> <hr style="border: 0.5px solid black;"/> <p style="text-align: center; padding: 5px;"><i>Trainers and Host De-brief</i></p>

## The ASK to Sustain Institute: Agenda over 3 Days

Day 1	Day 2	Day 3
AM	AM Opening Day 2  Learning Session II  Break (will occur during learning session)	AM Opening Day 3  Learning Session IV  Break  Action Planning Session  Evaluations  Closing Session
	Lunch	
PM Overview  Break  Learning Session I  Closing Session  End of Day 1	PM Learning Session III  Break will occur during learning session  Closing Session  End of Day 2	
<i>Trainers and Host De-brief</i>	<i>Trainers and Host De-brief</i>	

# The ASK to Sustain Institute

## Session Selections

	<b>RESOURCE DEVELOPMENT</b>	<b>MEDIA &amp; MARKETING</b>	<b>COLLABORATION</b>	<b>VOLUNTEER MANAGEMENT</b>
I	Fund Raising On The Go	Presentations that Pop	Mapping the Environment	Prepare for Excellence
II	Search and Prepare	Tell Your Story/ In Print	Strategic Networking	Find the “Right” Volunteer for the Right Task
III	Ask by ... <ul style="list-style-type: none"> <li>• Mail</li> <li>• Phone</li> <li>• Event</li> </ul>	Manage the Media	Run Effective Meetings and Facilitate from the Back of the Room	Retain and Develop Volunteers
IV	Make the ASK – as Program and Individual	Interviews that Intrigue	Keep Partners Interested and Involved Over Time	Build Champions for Your Program

## Suggested Norms

- Start and end on time.
- Respect each person's experience and contributions.
- Give everyone the chance to participate.
- Limit side conversations.
- Take responsibility for your own learning.
- Ask questions!
- Share (concisely) what you know to help each other learn.
- Get individual help at in-between times or in follow-up TA.
- Take care of yourself.
- Other things you need to make this time productive???
- 
- 
-

# **The ASK to Sustain Institute Action Planning Process**

- Action Plan Reflection (sample of worksheet on next page)
- Sharing and Feedback
- One Unique Idea (each table)

# Sustainability Action Plan Worksheet Example

Participant's Name: \_\_\_\_\_ Phone \_\_\_\_\_  
E-Mail \_\_\_\_\_

Name of Workshop Attended	Actions to Take	By Date	Ideas from Peers

# The ASK to Sustain Institute

- Evaluations
- Closing Session



# Concept Index

This index focuses on five concepts covered in the ASK to Sustain Institute:

- Building Partnerships
- Case for Support
- Marketing Your Program
- Stakeholders
- Volunteer Involvement.

While you may focus on one specific strategy (such as Resource Development) during the Institute, all of the strategies are required for sustainability and the topics are inter-related. To fully utilize the synergy between these strategies, it is useful to explore these concepts from the various perspectives each manual has to offer. The following index will help locate related ideas and tools throughout the four manuals.

# Building Partnerships

## Resource Development

### On the Go

Value of Connectors ..... Page 10

### Mail-Phone-Event

Cast and Committee Roles ..... Page 47

Volunteers and Mission Champions ..... Page 72

### Make The Ask

Key Components of a Fund Raising Campaign ..... Page 72

## Media and Marketing

### Presentations That Pop

About the Audience ..... Page 8

### Tell Your Story

The Audience ..... Page 4

The Discussions Group: Tip Sheet ..... Page 29

### Manage the Media

The News Media ..... Page 4

Communicating with the News Media ..... Page 7

Build Relationships with Individual Reporters ..... Page 10

## Volunteer Development

### Prepare for Excellence

Organizational Buy-In ..... Page 13

Volunteer Management Wish List ..... Page 16

Create a Strategic Plan/Develop a Strategic Action Plan ..... Page 26

**Finding the Right Volunteers**

Why do People Volunteer/Answers ..... Page(s) 3/4

Recruitment & Retention Steps ..... Page 9

**Retain and Develop Volunteers**

Recognition and Reward ..... Page 8

**Build Champions**

Roles and Activities for Organizational

Volunteers as Champions ..... Page 14

# Case for Support

## Media and Marketing

### **Presentations That Pop**

The Art of Communication .....	Page 2
The Six Principles of Powerful Presentations .....	Page 16

### **Tell Your Story**

Message .....	Page 5
Craft the Key Talking Points .....	Page 6
Supporting Information: Statistics and Anecdotes .....	Page 7
Finishing Touch: Your Tag Line .....	Page 7

### **Manage the Media**

Make the Pitch .....	Page 11
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### **Interviews that Intrigue**

Interview Preparation Tips .....	Page 3
You re on the Spot: Tools for Handling Tough Questions .....	Page 7

## Collaboration

### **Mapping the Environment**

Internal Audit .....	Page 17
Crafting your Ask for Collaboration/Support .....	Page 18
Perception Box .....	Page 25

### **Strategic Networking**

Coaching for Networking Reception II Answer with Purpose .....	Page 15
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### **Effective Meetings**

Brainstorming and Prioritize the Meeting Objectives .....	Page 14
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### **Interested and Involved**

Techniques for Adapting to Cultural Differences .....	Page(s) 28/29
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## **Volunteer Development**

### **Prepare for Excellence**

Organizational Buy-In .....	Page 13
Volunteer Management Wish List .....	Page 16
Create a Strategic Plan/Develop a Strategic Action Plan .....	Page 26

### **Finding the Right Volunteers**

Why do People Volunteer/Answers .....	Page(s) 3/4
Recruitment & Retention Steps .....	Page 9

### **Retain and Develop Volunteers**

Recognition and Reward .....	Page 8
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### **Build Champions**

Roles and Activities for Organizational Volunteers as Champions .....	Page 14
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# Marketing Your Program

## Resource Development

### On the Go

A Conversation About Mission ..... Page 3

### Search and Prepare

The Need Statement ..... Page 4

### Mail-Phone-Event

Direct Mail Strategies ..... Page 13

Direct Mail Letter Writing Tips ..... Page 15

How Can a Phonathon Help Your Program ..... Page 38

Ten Guiding Principles for Special Events ..... Page 66

### Make The Ask

Making the Ask: The Call ..... Page 26

## Collaboration

### Mapping the Environment

Internal Audit ..... Page 17

Crafting your Ask for Collaboration/Support ..... Page 18

Perception Box ..... Page 25

### Strategic Networking

Coaching for Networking Reception II Answer with Purpose ..... Page 15

### Effective Meetings

Brainstorming and Prioritize the Meeting Objectives ..... Page 14

### Interested and Involved

Techniques for Adapting to Cultural Differences ..... Page (s) 28/29

## **Volunteer Development**

### **Prepare for Excellence**

Welcoming Volunteers, Members, and Program Participants ..... Page 9

Creating a Welcoming Climate ..... Page 10

### **Finding the Right Volunteers**

Special Recruitment Issues: Recruiting Volunteer Leaders  
in New Communities ..... Page 22

### **Retain and Develop Volunteers**

Supervise and Evaluate Volunteers ..... Page 6

### **Build Champions**

Champions ..... Page 2

Cultivating Stakeholders into Champions ..... Page 6

# Stakeholders

## Resource Development

### On the Go

Value of Connectors ..... Page 10

Fundraising on the Go Small Gestures--Big Payoffs! ..... Page 14

### Search and Prepare

Sample Project Partners Program Chart ..... Page 37

### Mail-Phone-Event

Building Stakeholder Involvement ..... Page 71

### Make The Ask

Celebrate Volunteer Involvement and Campaign Success ..... Page 15

## Media and Marketing

### Presentations That Pop

About the Audience ..... Page 8

### Tell Your Story

The Audience ..... Page 8

### Manage the Media

The News Media ..... Page 4

Get to Know Reporters ..... Page 29

## **Collaboration**

### **Mapping the Environment**

What is a Stakeholder? .....	Page 2
Stakeholders and Collaboration .....	Page 5
Expanding the Circle .....	Page 7
Stakeholder Work Sheet .....	Page 24

### **Strategic Networking**

Reaching Out to new Cultural Groups .....	Page 8
Matching Opportunities .....	Page 22
Places to Network .....	Page 25

### **Effective Meetings**

Consider the Cultural Differences and the Method of Facilitation .....	Page 6
Appendix H-1 Stakeholder Decision Making Process .....	Page 35

### **Interested and Involved**

Keeping Partners Interested and Involved Over Time .....	Page 1
Ten Dangerous Sand Traps! .....	Page 12
Troubleshooting: Challenges to Partnership Success .....	Page 24
Guidelines for Responding to Conflict .....	Page 34
Functioning in a Group Leadership Roles .....	Page 40

## **Volunteer Development**

### **Prepare for Excellence**

Welcoming Volunteers, Members, and Program Participants .....	Page 9
Creating a Welcoming Climate .....	Page 10

### **Finding the Right Volunteers**

Special Recruitment Issues: Recruiting Volunteer Leaders in New Communities .....	Page 22
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**Retain and Develop Volunteers**

Retention Principles ..... Page 3  
Supervise and Evaluate Volunteers ..... Page 6

**Build Champions**

Champions ..... Page 2  
Cultivating Stakeholders into Champions ..... Page 6

# Volunteer Involvement

## Resource Development

### On the Go

The Value of Connectors ..... Page 10

### Mail-Phone-Event

Tips for Recruiting Volunteer Callers ..... Page 49

Special Event Volunteers and Mission Champions ..... Page 72

### Make The Ask

Celebrate Volunteer Involvement and Campaign Success ..... Page 15

## Media and Marketing

### Manage the Media

Communicating with the News Media ..... Page 7

Build Relationships with Individual Reporters ..... Page 10

## Collaboration

### Mapping the Environment

Stakeholder Brainstorm ..... Page 3

Expanding the Circle ..... Page 7

### Strategic Networking

Places to Network ..... Page 25

### Effective Meetings

Co-Facilitator ..... Page 11

Vibes Watcher ..... Page 12

### Interested and Involved

Decision Making Options ..... Page 3

# **The End Is Just The Beginning!**

# SustainAbility Concept Index

There are several SustainAbility concepts found throughout the four sessions on Resource Development, Volunteer Management, Media and Marketing, and Collaboration and within the respective manuals.

To fully utilize the synergy between these concepts and the perspectives each manual has to offer, the following index is designed to help you investigate the concepts further by locating related ideas and tools throughout the four manuals.

The SustainAbility Concept Index focuses on these five concepts:

- Stakeholders
- Building Partnerships
- Case for Support
- Marketing Your Program
- Volunteer Involvement.

# Stakeholders

## Resource Development

### On the Go

Value of Connectors .....	10
Fundraising on the Go Small Gestures--Big Payoffs! .....	14

### Search and Prepare

Sample Project Partners Program Chart .....	37
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### Mail-Phone-Event

Building Stakeholder Involvement .....	71
--	----

### Make The Ask

Celebrate Volunteer Involvement and Campaign Success .....	15
--	----

## Media and Marketing

### Presentations That Pop

About the Audience .....	8
--------------------------	---

### Tell Your Story

The Audience .....	8
--------------------	---

### Manage the Media

The News Media .....	4
Get to Know Reporters .....	29

# Stakeholders (Continued)

## Collaboration

### Mapping the Environment

What is a Stakeholder? .....	2
Stakeholders and Collaboration .....	5
Expanding the Circle .....	7
Stakeholder Work Sheet .....	24

### Strategic Networking

Reaching Out to new Cultural Groups .....	8
Matching Opportunities .....	22
Places to Network .....	25

### Effective Meetings

Consider the Cultural Differences and the Method of Facilitation .....	6
Appendix H-1 Stakeholder Decision Making Process .....	35

### Interested and Involved

Keeping Partners Interested and Involved Over Time .....	1
Ten Dangerous Sand Traps! .....	12
Troubleshooting: Challenges to Partnership Success .....	24
Guidelines for Responding to Conflict .....	34
Functioning in a Group Leadership Roles .....	40

# Stakeholders (Continued)

## Volunteer Management

Prepare for Excellence	
Welcoming Volunteers, Members, and Program Participants .....	9
Creating a Welcoming Climate .....	10

### **Finding the Right Volunteers**

Special Recruitment Issues: Recruiting Volunteer Leaders in New Communities .....	22
--	----

### **Retain and Develop Volunteers**

Retention Principles .....	3
Supervise and Evaluate Volunteers .....	6

### **Build Champions**

Champions .....	2
Cultivating Stakeholders into Champions .....	6

# Building Partnerships

## Resource Development

### On the Go

Value of Connectors ..... 10

### Mail-Phone-Event

Cast and Committee Roles ..... 47

Volunteers and Mission Champions ..... 72

### Make The Ask

Key Components of a Fund Raising Campaign ..... 72

## Media and Marketing

### Presentations That Pop

About the Audience ..... 8

### Tell Your Story

The Audience ..... 4

The Discussions Group: Tip Sheet ..... 29

### Manage the Media

The News Media ..... 4

Communicating with the News Media ..... 7

Build Relationships with Individual Reporters ..... 10

**Collaboration** ..... throughout

# Building Partnerships (Continued)

## Volunteer Management

### Prepare for Excellence

Organizational Buy-In .....	13
Volunteer Management Wish List .....	16
Create a Strategic Plan/Develop a Strategic Action Plan .....	26

### Finding the Right Volunteers

Why do People Volunteer/Answers .....	3,4
Recruitment & Retention Steps .....	9

### Retain and Develop Volunteers

Recognition and Reward .....	8
------------------------------	---

### Build Champions

Roles and Activities for Organizational Volunteers as Champions .....	14
--	----

# Case for Support

**Resource Development** ..... throughout

## **Media and Marketing**

### **Presentations That Pop**

The Art of Communication .....	2
The Six Principles of Powerful Presentations .....	16

### **Tell Your Story**

Message .....	5
Craft the Key Talking Points .....	6
Supporting Information: Statistics and Anecdotes .....	7
Finishing Touch: Your Tag Line .....	7

### **Manage the Media**

Make the Pitch .....	11
----------------------	----

### **Interviews that Intrigue**

Interview Preparation Tips .....	3
You're on the Spot: Tools for Handling Tough Questions .....	7

# Case for Support (Continued)

## Collaboration

### Mapping the Environment

Internal Audit .....	17
Crafting your Ask for Collaboration/Support .....	18
Perception Box .....	25

### Strategic Networking

Coaching for Networking Reception II Answer with Purpose .....	15
--	----

### Effective Meetings

Brainstorming and Prioritize the Meeting Objectives .....	14
---	----

### Interested and Involved

Techniques for Adapting to Cultural Differences .....	28,29
---	-------

## Volunteer Management

### Prepare for Excellence

Organizational Buy-In .....	13
Volunteer Management Wish List .....	16
Create a Strategic Plan/Develop a Strategic Action Plan .....	26

### Finding the Right Volunteers

Why do People Volunteer/Answers .....	3,4
Recruitment & Retention Steps .....	9

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Recognition and Reward .....	8
------------------------------	---

### Build Champions

Roles and Activities for Organizational Volunteers as Champions .....	14
--	----

# Marketing Your Program

## Resource Development

### On the Go

A Conversation About Mission ..... 3

### Search and Prepare

The Need Statement ..... 4

### Mail-Phone-Event

Direct Mail Strategies ..... 13

Direct Mail Letter Writing Tips ..... 15

How Can a Phonathon Help Your Program ..... 38

Ten Guiding Principles for Special Events ..... 66

### Make The Ask

Making the Ask: The Call ..... 26

**Media and Marketing** ..... throughout

# Marketing Your Program (Continued)

## Collaboration

### Mapping the Environment

Internal Audit .....	17
Crafting your Ask for Collaboration/Support .....	18
Perception Box .....	25

### Strategic Networking

Coaching for Networking Reception II Answer with Purpose .....	15
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### Effective Meetings

Brainstorming and Prioritize the Meeting Objectives .....	14
---	----

### Interested and Involved

Techniques for Adapting to Cultural Differences .....	28,29
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## Volunteer Management

### Prepare for Excellence

Welcoming Volunteers, Members, and Program Participants .....	9
Creating a Welcoming Climate .....	10

### Finding the Right Volunteers

Special Recruitment Issues: Recruiting Volunteer Leaders in New Communities .....	22
--	----

### Retain and Develop Volunteers

Supervise and Evaluate Volunteers .....	6
---	---

### Build Champions

Champions .....	2
Cultivating Stakeholders into Champions .....	6

# Volunteer Involvement

## Resource Development

### On the Go

The Value of Connectors ..... 10

### Mail-Phone-Event

Tips for Recruiting Volunteer Callers ..... 49

Special Event Volunteers and Mission Champions ..... 72

### Make The Ask

Celebrate Volunteer Involvement and Campaign Success ..... 15

## Media and Marketing

### Manage the Media

Communicating with the News Media ..... 7

Build Relationships with Individual Reporters ..... 10

# Volunteer Involvement (Continued)

## Collaboration

### Mapping the Environment

Stakeholder Brainstorm .....	3
Expanding the Circle .....	7

### Strategic Networking

Places to Network .....	25
-------------------------	----

### Effective Meetings

Co-Facilitator .....	11
Vibes Watcher .....	12

### Interested and Involved

Decision Making Options .....	3
-------------------------------	---

<b>Volunteer Management</b> .....	throughout
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# **The End Is Just The Beginning!**