

# **Penn State Seminar**

## ***Effectively Engaging Penn State Campaign Volunteers***

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**College & Campus Chairs Meeting**  
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*Future*

*For the future*  
THE CAMPAIGN FOR PENN STATE STUDENTS



# Think About Your Volunteer Experience at Penn State

- Why are you involved? (Write it down.)
- How has the quality of your experience changed?
- How would you define satisfaction in your experience in this campaign? (Write it down.)
- How chairs can use this process with their committee members

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# Our Goal Today

- Facilitate the evolution of volunteer leadership so that volunteers, deans, chancellors, and development professionals are all on the same page regarding expectations and responsibilities
- Specific targets of our attention:
  - Current and aspirational roles of volunteers in a campaign
  - Achieving an appropriate comfort level for volunteers relative to these roles
  - How to recruit volunteers with local nuance

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# Our Goal Today

- Specific targets of our attention (continued):
  - How development staff can facilitate effective volunteer leadership
  - What the volunteer should expect from the deans/chancellors and the development staff
  - How to thank a volunteer who isn't productive as they depart
- Let us hear all of your ideas and questions

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# What Is Your Social Contract/Volunteer Profile/Current Volunteer Role with Penn State?

- As chair:
  - “...Make a significant gift...”
  - Lead by example
  - “Spearhead and/or accompany... cultivation and solicitation...”
- What is the agreement with your committee members?

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# What Is the Aspirational Role?

- Using the occasion of this campaign to foster the evolution of volunteer leaders so that
  - In coordination with colleagues
  - Over time
  - And with a shared comfort level
- Volunteers generally become
  - Donors
  - Advocates
  - Fundraisers
- Do we agree with this aspiration?

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# Achieving an Appropriate Comfort Level for Volunteers Relative to These Roles

- Communication, communication, communication
  - Regarding expectations
  - Progress
  - Discomfort

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# Fail-Safe Strategy: Think Like the Volunteer

- What do you want me to do?
- Why do you think I will be effective?
- How much of my time will it take to be effective?
- How much of a philanthropic commitment is expected of me?

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# The Rewards and Risks of Volunteer Engagement

- In small groups, discuss and select three rewards and three risk that are most salient to you now
  - How chairs can use this process with their committees
- Rewards
  - Informed, committed volunteers make better donors (or the best!)
  - Their off-campus expertise could actually help shape or sharpen our case
    - The market's perspective
  - Through personal commitments and advocacy, they reinforce a culture of philanthropy
    - Humans mimic each other

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# The Rewards and Risks of Volunteer Engagement

- Rewards (continued)
  - Through their off-campus network of relationships, they can access prospects we can't
  - They can carry a message others can't
  - The President respects them
  - Others?

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# The Rewards and Risks of Volunteer Engagement

- And the risks
  - Limited value added (what can they do?)
  - They will tell me what to do (and I have enough bosses)
  - How do they know what to do (do they understand our world?)
  - They will push their personal agenda and not necessarily Penn State's priorities

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# The Rewards and Risks of Volunteer Engagement

- The risks (continued)
  - How long will they be committed?
  - Are they accountable?
  - Will they be comfortable with staff and enhance the overall productivity?
  - Others?

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# The Committee Chair

- As committee chair, you are the ball club's manager who maximizes each member's potential
  - Personal leadership skills
  - Willing to engage and empower the work of others
  - Ability to organize and run a meeting
  - Emblematic of the institution's value and "brand"
  - Has a passion for the institution's mission and deep grasp of its "case"
  - An articulate spokesperson for the institution and its "case"

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# The Committee Chair

- You are the ball club's manager who maximizes each member's potential (continued)
  - Willing to give sufficient time to accomplish the work of the committee
  - Personal philanthropic commitment
  - Willing to hold colleagues accountable for their commitments to you and the institution
  - A strategic partner and an exemplar in the cultivation and, where appropriate, the solicitation of donors

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# How Development Professionals Can Facilitate Effective Committee Chairs/Members

- A core best practice: the work of the committee occurs between meetings
- How:
  - The work is driven by four pillars (case, leadership, prospects, investment)
  - And driven by 1:1 staff-volunteer assigned partners
- Result: meetings that volunteers want to attend/not miss because that is where the action is
  - Celebrate!

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# What Volunteers/Volunteer Leaders Should Expect from Deans, Chancellors, and Development Professionals

- Deans/chancellors
  - Vision
  - A clear and compelling case
  - A real-time partner (“...spearhead and accompany..cultivation and solicitation...”)
  - Frankness regarding effectiveness
  - Hold development staff accountable
  - Sense of humor

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# What Volunteers/Volunteer Leaders Should Expect from Deans, Chancellors, and Development Professionals

- Development professionals
  - Get “it” done
  - Absolute commitment to the volunteer’s success
  - A 1:1 partner
    - Lead but follow: suggest assignments that could be successful
  - Anticipating the volunteer’s needs
  - Frankness
  - The Penn State way: make this a productive and enjoyable experience

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# Specific Blocking and Tackling Skills

- Ideas for what the chair can say to energize the committee
  - Think like the donor/prospect
  - How? Ask donors/prospects open-ended questions so you know what they're thinking
- Call committee members to motivate progress
  - Supplement staff follow-up
- Volunteer's continuity over time is a strategic investment with dividends

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# Specific Blocking and Tackling Skills

- Examples of updating volunteers with meaningful communications
  - Read-aheads to make meetings dynamic
    - Limiting reporting from meetings
      - Can be shared over a meal
    - Success stories to illustrate
    - Concept papers to educate
  - Committee agendas that orchestrate engagement
    - No random names

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# Specific Blocking and Tackling Skills

- Addressing activities that aren't strategic or require too much staff time
  - Go back to the founding principle of a clear and compelling case; how does this activity fit?
  - Does the volunteer bring special expertise to maximize the fail-safe strategy?
    - Is this cost/time efficient?
  - Has this activity been vetted with the staff partner beforehand?

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# Specific Blocking and Tackling Skills

- Strategies for dealing with committee members who are chatty
  - Development staff partner preps the committee member on his/her prospect strategies: that's the agenda
  - Chair manages the flow and pace with an annotated agenda
    - Committee members will learn the dance steps
- Remember: the chair has the license to run the meeting

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# Specific Blocking and Tackling Skills

- How to understand a volunteer who isn't productive
  - Who brought him/her to the party?
  - Use the fail-safe as the template

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# What Is the Aspirational Role?

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# Specific Blocking and Tackling Skills

- Fundraising in challenging times: tangible tactics
  - Assume nothing
  - Visit to communicate
    - Communicate with deans/chancellors/staff
  - Emphasize the positive: the impact of philanthropy
    - It really is about the impact, the commitment, not just the dollars or the amount
  - Dealing with the negative
  - Be realistic/honest/focused
  - Repeat the mantra
    - If not me, who?
    - If not now, when?

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