

It's Who YOU Know

Campaign All-Volunteer Summit
September 14, 2012

David Lieb and Kelly Snyder



For the future
THE CAMPAIGN FOR PENN STATE STUDENTS





For the future
THE CAMPAIGN FOR PENN STATE STUDENTS

PENNSSTATE



WHY?

- **Need for ongoing assessment and engagement**
 - **Campaign is not over**
 - **Continuous donor identification will be important in the next 20 months and in the years following the campaign**

Why...?



"LET'S SEE. ONE DOLLAR FROM EACH OF OUR TWENTY MILLION FACEBOOK FANS AND THIS CAMPAIGN WILL BE A WRAP."

It's Who YOU Know

- **Volunteers can maximize their networks/connections to help Penn State and assist in expanding the donor base**
- **Need to look beyond the alumni network and consider friends, corporations, foundations with whom you may have relationships and connections**

Success Story

- **Bob Metzgar was instrumental in identifying a prospect for us and helped to get them engaged with Penn State. So far, that's worked out pretty well for Penn State.**
- **Who was that prospect...?**

Kim and Terry Pegula

For the future
THE CAMPAIGN FOR PENN STATE STUDENTS



Penn State Volunteer Protocol

What information can be shared with volunteers

- **Donor identification lists**
- **Volunteer Research Report**
- **Host Note Guide**

DISCRETION AND CONFIDENTIALITY ARE CRITICAL!

Review of Prospect Lists

- **Ability to customize to take advantage of your networks**
- **Created using data stored in University Development's database**
- **Allows for a review of who you might know and opportunity to share relevant information**
 - **Assist in identifying potential prospects, e.g. share knowledge re: homes, lifestyle, job, children, community interests**
 - **Assist in identifying errors, e.g. updated job information, new address**

Lists Can be Customized

- **Class years**
- **Majors**
- **Fraternities**
- **Numerous student activities such as Collegian, Lion Ambassador, etc**
- **Industry sector (sometimes)**
- **Companies**
- **Geographic**

Host Events

Small intimate events at home, office, club, sporting event, etc

Keys to success:

- **Planning and strategy**
- **Appropriate targeted guest list**
- **Debrief after event to share knowledge and collaborate on next steps with staff**
 - **Can provide written guidance on the collection of information**
 - **Follow-up on appropriate next steps**

Share

- **Information you know**
 - **Industry salaries and/or other compensation**
 - **Club dues/expenses, etc**
 - **Companies or private foundations in your network**
 - **Corporate intelligence**
 - **Mergers and acquisitions**
 - **Different ways companies give**
 - **Outright, gifts-in-kind, bargain sales**
 - **News clippings of interest**

Keys to Success

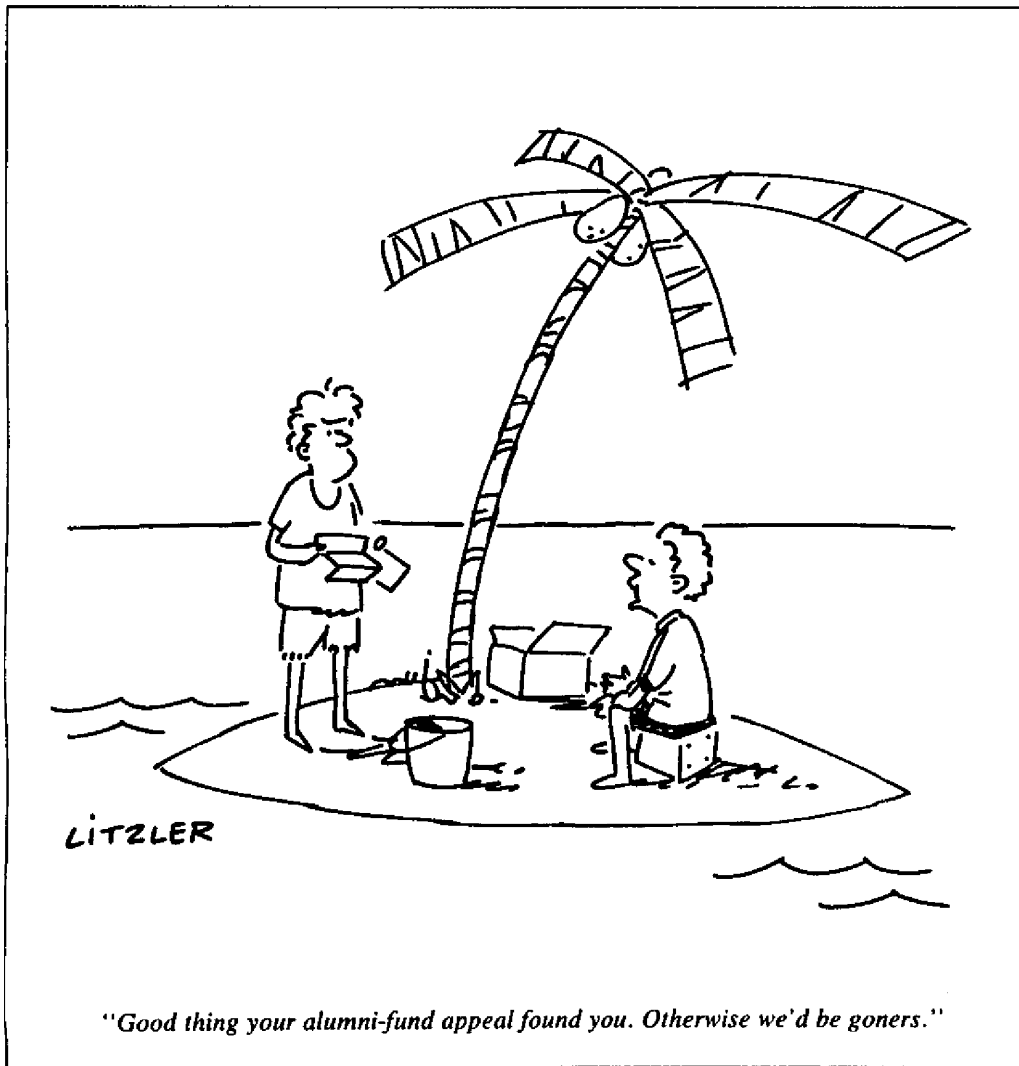
- **Units, volunteers and Research collaborate on the front end**
- **Realistic expectations**
- **Follow-up**
- **Follow-up**

Open the Door for Development staff

- **Personal introductions**
- **Introduce staff via e-mail or other means**

Prepare Your Elevator Speech

- **Highlight personal experience**
- **Does not need to involve a lengthy discussion about giving**
 - **It's more important to get them excited about learning more about Penn State or the unit you represent**
- **Open the door to their involvement**



THE CHRONICLE OF PHILANTHROPY

MARK LITZLER

For the future
THE CAMPAIGN FOR PENN STATE STUDENTS

PENNSSTATE

