

The Green Book Chapter 5: The Role of Volunteers in Major Gifts Fund-raising



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Approximately 65 percent of all donors interviewed felt they “made their own decision” to give to the YMCA, as opposed to being asked by a volunteer.

Surprised? We sure were when this statement was shared with many of the YMCA's involved in the initial research for *The Green Book* in 2006. After all, our annual campaign plans were developed following the tried-and-true practices of volunteer-led, face-to-face solicitations. How could someone make a gift without being asked by one of our trained volunteers? And, if true, what role did this portend for the role of volunteers in the new major gifts world we were exploring?

As the study proceeded, we did determine that many of our donors were touched by a volunteer fund-raiser for our YMCA, but in a way that was not perceived by a donor as an “ask.” And a new picture of their role began to emerge.

We learned we needed to help our volunteers change old habits – asking for the same amount year-in-and-year-out in the same manner; we needed to change the training and coaching we did to build confidence for their new role when on a major gifts call; and we needed to make sure each volunteer was matched for the right role in this form of fund-raising.

Two key best practices emerged:

- 1) Enhanced volunteer training
- 2) Tiered volunteer structure

As to number one, we need to focus on developing a strong training program that gives volunteers real strategies to use to increase gift values among donors. It needs to be engaging and informational to inspire a change in how they ask for gifts. This is detailed in chapter six of *The Green Book*.

As to number two, we learned that a segmented system of volunteering, in which volunteers are placed in roles that are suited to their skills and ability, can maximize volunteers' varied strengths and create a streamlined campaign approach that is designed around motivating donors to give generously. Volunteers may move from one tier to another, but they may also enter at any level and be effective without changing their role.

Four tiers were identified:

- **Tier One** – New volunteers. Involve in donor stewardship activities.
- **Tier Two** – Majority of annual campaign volunteers. Involve in solicitation activities designed to move a donor's giving incrementally.
- **Tier Three** – Stronger volunteer fund-raiser. Excited to make larger asks.
- **Tier Four** – Leadership volunteers. Capable of negotiating high-level gifts.

As you read the articles in this issue, you will learn more about volunteers and their involvement at this level of YMCA fund-raising. But, keep in mind; success starts with matching the right volunteer to the right role. Once a volunteer finds the spot where he/she can be the most effective, the rest will fall into place.



YMCA DEVELOPMENTS



Winter 2010

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NAYDO
NORTH AMERICAN YMCA
DEVELOPMENT ORGANIZATION

Message from the Chair



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**Welcome to the dawn of
a new decade!**

Here's wishing you and your YMCA a great start. During this time of year many of our YMCA's are engaged in annual support campaigns which makes it a great time to shine a spotlight on volunteer development and for a renewed focus on building volunteer competencies. Although volunteer development should be done year-round, training of your campaigners / volunteers should always be included as an essential element in your annual campaign plan. The father of modern management, Peter F. Drucker, an economist, professor, writer, and consultant who focused his career on management and economics in the public and private sectors once said: "Any organization develops people; it has no choice. It either helps them grow or it stunts them." With this basic truth and principle in mind this issue of *Developments* is focused on volunteer development and the role of our volunteers in fund raising.

To help solve the issues within our communities, the recipe perfected by the YMCA requires a strong volunteer base. It is no coincidence that YMCA history chronicles a marvelous heritage of cultivation, education and preparation of volunteers for leadership in the service of others and for the common good. Based on this history it's important for us to be ever mindful that our ability to attract and engage committed volunteers determine the performance and positive impact of the organization. This is why genuine volunteer development helps to build the capacities of individuals, groups, and organizations like the YMCA in our mission work.

It's a proven fact that investing in volunteer development pays substantial dividends in creating a source of strength for your YMCA. It also promotes both the commitment to your mission as well as the inspiration for the philanthropic funding support needed to accomplish the inclusive mission of the YMCA.

As you work to recruit, engage, develop, train and strengthen your volunteers it's also important to ask yourself the following checklist of questions:

- Does your YMCA providing the proper tools and training to grow your volunteer's confidence as YMCA storytellers and fund-raisers?
- Have you identified the type of volunteers that make the best fund-raisers?
- Do you hold volunteers accountable?
- Do you organize volunteers effectively?

Let me recommend a resource that answers these truly relevant questions and more. *The Green Book: Encouraging Increasingly Generous Giving Among YMCA Donors*. This invaluable tool and publication can be found on the NAYDO web site at www.naydo.org – in the shared documents section.

The Green Book, developed by NAYDO, the North American Urban Group/Metro 30 Chief Development Officers, YMCA Canada and the YMCA of the USA. It's based on research conducted across North America. *The Green Book* was created to help our YMCAs determine how we could improve upon our fund-raising strategies to attain larger gifts in support of important YMCA programs. The research focused on conducting extensive research via personal and telephone interviews and print surveys of YMCA donors, fund-raising volunteers and staff from among 16 YMCA's of varying sizes. *The Green Book* provides the results of the research and tests a recommended approach for YMCAs seeking to develop a donor-centered fund-raising program. Application of the proven principles in this recommended resource can help in your YMCA's volunteer development program and can lead to larger gifts over time. Attention paid to helping your volunteers reach their maximum potential will help to keep the flame of making a difference alive within your YMCA.

Finally, the beginning of the year we hope heightens your anticipation of attending and participating in the NAYDO Conference. The grand city of Charlotte will be the backdrop for this year's conference. This 29th Annual NAYDO Conference on YMCA Philanthropy with the theme of "One World One YMCA" will challenge us all to "think globally, act locally" about philanthropy. With a great line up of keynotes and experts covering hot topics like "The Impact of Social Networking on Philanthropy and Its Relevance in the Nonprofit World" we'll help to improve your knowledge.

And with our new technology lab, more than 50 workshops and exhibits will help prepare your YMCA staff and volunteers for the latest advances in effective fund raising. Volunteers and staff from the YMCA of Greater Charlotte have done an excellent job of providing great hotel accommodations, scheduling optional advance YMCA tours and a Friday evening event at Charlotte's newest entertainment center that has something for all. This is one NAYDO conference you don't want to miss.

I look forward to seeing you there.

Tony Penn, Chair
North American YMCA Development
Organization



Volunteers

Help Secure Major Gifts Using Social Networks



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The YMCA of Greater Vancouver has experienced tremendous fund-raising success over the past ten years. Even though we didn't have a name for it until platforms like Facebook and Twitter came along, much of that success can be attributed to the power of social networking that our volunteer campaign cabinet members bring to the organization.

Creating and maintaining an environment conducive to fund-raising success begins with exceptional volunteer leaders like John Willson, co-chair of the Strong Foundations, Strong Communities (SFSC) campaign, which is focused on funding three capital projects and growing endowment. A retired executive with 30 years experience in the mining industry, John has been volunteering with the YMCA of Greater Vancouver since 2000. During that time, he has gained such confidence in the Y's purpose and capacity to impact the lives of people in our community that he and his wife Susan were inspired to become major donors to the new Robert Lee YMCA in downtown Vancouver: A gift that is ten times larger than any they have given to another organization.

When asked why he likes the YMCA, John explains that it is what the YMCA does that attracts him most. "The Y is a positive force for good," he said. "It is blind to race, creed and colour, and I love its values and principles."

Also important to John is the fact that the vast majority of his donation is fairly and honestly invested in the achievement of the Y's mission. "I trust the Y because I know its leaders well. They are excellent individuals with many of the same values that I espouse. With so much crime, dishonesty, dissembly and politics in our world today I find the Y to be a breath of fresh air."

When I inquired about how he responds when approached for a significant gift to an organization, John offered this insight. "I try to listen generously. I appreciate the difficult thing that the askers are doing and let them know that I am interested in all good causes but have some 'screens' that have to work for me." John's approach to making gifts is important in our effort to understand what motivates donors to

give and the environment we need to create for donors to be encouraged to give to the YMCA.

As one can imagine, John Willson's commitment to the YMCA coupled with how respected he is in the business community has led to some amazing stories and synergy in our SFSC campaign—and this is where social networking comes into play.

One great example that John shared as his best experience was when the SFSC cabinet approached Teck Cominco (now Teck) to support the new YMCA on Burrard Street in Vancouver. Having worked with Teck for 14 years, John joined Bill Stewart, CEO of the Greater Vancouver YMCA, in a meeting to ask for a \$100,000 donation. When Teck said yes to the request, John was both energized and elated. But the story doesn't end there. Another cabinet member, Bill Baak, also had an excellent working relationship with Teck's CEO and suggested we re-approach the company for a larger gift based on their good fortunes at the time.

The cabinet agreed that Bill Baak should test the water with Teck. Having done so, Teck's CEO directed him to their community gift people and a new negotiation process that drew on the social networks of both John and Bill began. Making up the other half of the team, the YMCA's Bill Stewart and Ken Waterman provided the organizational expertise required to support the ask. That teamwork paid off late on a Friday evening some months later when John received an excited call from his former colleague Kia Barker, telling him that the YMCA had been successful. The total gift from Teck was now \$500,000.

John was both exhilarated and proud. "I had never been involved in securing such a gift. It was a thrill, particularly because it involved a team effort."

As a result of this success, John continues to look for opportunities to leverage the power of his network for an organization that is close to his heart.

Why volunteers matter so much:

- Fund raising, be it major gifts, annual or planned giving, works best when volunteers and staff work together in partnership. Volunteers bring their talents, contacts and information to the table to identify potential donors with the capacity and interest to give and staff provide the organizational expertise necessary to build a strong case for support.
- The power of the volunteer leading the relationship building and storytelling during an 'ask' is empowering to the volunteer and strengthens the YMCA's relationship with the potential donor. It is easy for a donor to think, "you're a staff member, it's your job to sell the organization," but when the request comes from volunteers who are so passionate about the organization that they are donors themselves, the impact can pay dividends in the community for generations to come.
- Tapping into the volunteer's knowledge of all donors (new and existing) can significantly increase donations. The Teck case is a great example of how the volunteers' passion for the YMCA, their personal connection to Teck and new information about the company increased the donor's gift by 400 percent.



Maximizing Volunteer Impact: Get the Right People in the Right Jobs



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Think about what it takes to effectively staff your organization: identifying candidates with the right skills and experience for specific jobs, evaluating candidates based on the job requirements, finding the right fit of talents and skills, and managing performance and development once staff is in the job.

It's very similar with volunteers, although we often don't invest the careful planning and management that's needed to develop such high-impact volunteers. And even more important, we often fail to link volunteers to the jobs that would be the most satisfying for them. We need to get to know our volunteers well enough to see through their eyes how to provide opportunities that fulfill their intrinsic goals. Volunteers work with us because it brings them happiness and satisfaction. It's our job to help make that happen.

By linking well prepared volunteers to assignments that are meaningful to them, we greatly expand our capacity to advance the mission and produce powerful results in our development efforts. Success in doing so depends on some basic, but critical strategies:

- As clearly as possible, define the type of help you need
- Identify volunteers with the skills, knowledge and experience that match those needs
- Cultivate and engage the volunteers, making sure you find out what is most motivating and satisfying to them
- Provide training, guidance and support, including clarity on the desired outcomes
- Maintain ongoing guidance, support, training and stewardship of volunteers.

These are familiar concepts, but they require solid planning and ongoing focus. Here are some tips to get you started:

Define the Help You Need

Similar to staff or board member job descriptions, clearly outline what help you need and what the volunteer is responsible for. Then think about the skills and experience required to meet these needs effectively. In many cases, we need volunteers for our annual campaigns to help identify prospective donors and campaigners, and to campaign themselves. In this example, you'd be looking for people with business development, sales, community development, government or other leadership skills. The campaigner job description from the YMCA Annual Support Campaign Manual outlines the tasks you need help with, and the skills and experience needed to do them effectively. YMCAs also need volunteers for less interactive work, such as helping plan campaign report meetings or making thank you calls to donors. In this case, you will look for people with strong project management and administrative skills.

Whatever the task, identifying the necessary skills and experience is essential and will help you begin to identify which volunteers to engage in which jobs.

Identify Prospective Volunteers

From the required skills, knowledge and experience you identified, consider the members and partners in your midst who fit those needs and begin to reach out to them. You can identify possible volunteers by working your network of past campaign volunteers, by consulting board members or others on your staff. You also can do this through your regular day-to-day engagement with members. It's not easy to approach members you haven't talked with before, but practice makes it easier and builds confidence. If meeting and talking with members is a personal challenge, ask for help. Your supervisor or another senior member of your staff can assist. And YMCA classes on working with members and volunteers are invaluable in

helping you build this skill. As you do so, remember that most members feel valued and appreciated when staff members take time to show an interest in them. Let their good feeling become yours as well. Stay focused on getting to know your members, what they appreciate about the YMCA and what their YMCA-related interests are. The more members you know the friendlier and more welcoming your YMCA becomes. Plus, you develop a longer list of talented volunteers whom you can match to jobs as they come up.

Cultivate and Engage Volunteers

Once you've identified some possible volunteers, get to know what's important to them. Think of your outreach, cultivation and recruitment as a long-term effort, not a one- or two-conversation task.

That means asking a lot of questions and listening carefully to the responses – both verbal and non-verbal. Ask open ended (rather than yes/no) questions such as: What's the most fun thing you do at the YMCA? What's your favorite thing about the YMCA? Of all the places you could be, why do you choose to spend time at the YMCA? Spend at least 80 percent of your time

listening – the rest of the time you should be asking questions. Through it all you should be carefully listening and learning about your member.

Remember at this stage you're trying to get to know what's important and meaningful to your prospective volunteer, not convince him or her to take on a job. With careful listening and observation it will soon become clear whether your prospective volunteer is inclined to work with you, and what area of activity he or she would most enjoy. In these cases you should continue to develop the relationship, learn more about his or her experience, skills and interests; and ultimately link your volunteer to the job that would be most satisfying for him or her. And of course, if you find your member has no interest, keep the friendly relationship going, but move on to develop

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You can't expect your volunteers to know what you need them to do without the proper training and preparation.

Maximizing Volunteer Impact
continues on page 10

Engaging Volunteers for Member-Donor Growth



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Our YMCA members can be one of the best sources for increasing annual contributions. The Ann Arbor YMCA participated in a pilot program – with Cygnus Applied Research, NAYDO, YMCA Canada, YMCA of the USA – to help YMCAs (and new volunteer campaigners) learn how to articulate the YMCA philanthropic mission to Y members and thereby turn more non-giving members into donors. We learned that well-trained and motivated volunteers are an invaluable tool for communicating the philanthropic mission among YMCA members and help create a sustainable donor base.

A key factor in the success of this project is the way in which volunteers are trained, particularly volunteers who had not previously raised money for the YMCA. This past year, the Ann Arbor YMCA took the following steps to more effectively engage volunteers in the campaign process. These eight steps can help other YMCAs as they search for creative ways to better connect and train volunteers:

1. Make training meaningful and mandatory

Call the volunteer training session what it is: a training session. Send campaigners an agenda that explains what they will learn at the training session. Give them a choice of training dates and times, and ask them to sign up for one of those specific dates and times. For the purposes of the pilot program, only new campaigners were invited to the training sessions, so that we would be able to compare the fund raising results of new campaigners to those of returning campaigners. Returning campaigners did not attend a training this past year.

2. Tell volunteers what you expect of them and how you will help them succeed

Explain to your volunteers that the campaign goal is to increase the number of member-donors, without sacrificing the average gift value and/or your overall campaign goal. Explain how you will provide them with member prospect lists, and/or supply information on other YMCA members they already know. In the case of the Ann Arbor YMCA, volunteers were invited to select prospects out of a list of non-giving members who were active at the YMCA.

3. Explain why members are important to your donor base

Members tend to be more loyal to the YMCA, and more likely to give. They just need to be asked. When donations come from members, the Y has a better chance of keeping them as long-term donors. Donors are in turn more likely to remain members. A specific effort was made to recruit members to be campaign volunteers. We feel that members are the best volunteers to ask other members for a gift. There are two additional benefits to this strategy: all campaign volunteers made their own gift – immediately increasing the over all number of member donors; and members have an access to their own small community (studio cycling, youth sports, child care, etc). 85 percent of the new volunteer campaigners were members and more than 80 percent of all volunteer campaigners were members. To help identify potential donors, our financial development staff created a list of non-giving members who were active at the YMCA and who had not previously given to the Y.

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As this project demonstrates, well-trained and motivated volunteers are an invaluable tool for communicating the philanthropic mission among YMCA members...

4. Explain the Y's philanthropic mission

Don't assume that your volunteers know that the YMCA is a charitable organization. Help volunteers understand the critical difference between membership fees and donations. Research by Environics in 2006 shows that some members don't give because they think that their YMCA membership fees are in part contributions. Be prepared to show your volunteers how membership fees cover operational expenses, while annual campaign donations fund various scholarships and outreach programs.

5. Show how your case for support addresses needs within your community

Encourage your volunteers to find a personal story that they are passionate about and that helps them illustrate which community needs the Y is able to respond

to with annual campaign funds. More than ever, your campaigners need to learn how to share compelling stories that help members understand how their donation to the YMCA will help serve those in need in their community.

Example: give your campaigners a response to potential donors who say "oh, but the Y already has plenty of money.

They don't address basic needs like food, or shelter..." Campaigners can describe the case for child care scholarships, for example. Child care scholarships are vital, because they enable working parents to keep their jobs, and engage their children in a safe, constructive environment throughout the workweek.

6. Find effective ways to show campaigners how to ask for money

Although new campaigners are enthusiastic about the idea of serving the YMCA through fund-raising efforts, most are not excited about doing the actual "ask."

- Rather than showing a video or doing role-plays, our staff presented case studies examples, which they discussed with campaigners during training. The

Engaging Volunteers continues on page 10

Find the Right Volunteer for the Right Role



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Volunteers are the heart of any successful YMCA financial development program. From board members to first year campaigners, volunteers play an integral role in helping to achieve mission impact and build a stronger community. Each and every volunteer has the opportunity to tell the YMCA story, meet with prospective donors and help build a culture of philanthropy at your YMCA.

Ask any Y staff person that has engaged a volunteer in meaningful fund raising activities and they will tell you it is not simply about filling slots on a campaign roster. It requires consistent, quality support to provide volunteers with opportunities to develop their skills and the motivation to continue to give of their time, talent and treasure on behalf of the YMCA.

Getting Started

Half the battle is won or lost before you even begin recruiting volunteer campaigners, during the identification process. An essential first step is the intentional process of identifying volunteer prospects. In order to effectively develop this list, staff and volunteer leadership should begin by identifying the qualities and skills a campaigner should possess. Ultimately these skill sets will be aligned with campaign opportunities to help bolster volunteer engagement.

YMCAs have commonly identified the following characteristics of a successful campaigner:

- Dedication to the YMCA mission
- Understanding and belief in the case for support
- Commitment to proven practices
- Positive, enthusiastic and optimistic approach
- Ability to organize and follow through on activities
- Willing to commit the necessary time

After determining the qualities you seek in volunteers, the next step is to being identifying prospective campaigners. The first place to begin this search is within your YMCAs membership. Review both long term facility/program members as well as past donors. These groups have made a commitment to your YMCA

already and may be interested in engaging at a deeper level. Also consider active community members that have shown a desire for building a stronger community.

Aligning With Opportunities

You have already developed a list of potential campaigners and may be asking yourself a number of questions. To which committee or campaign segment should I be recruiting

each individual? How can I grow my list of potential prospects? The good news is every YMCAs financial development program provides a wide variety of opportunities to engage volunteers. Like a puzzle, the task at hand is now to determine where each prospect is best suited to successfully complete the big picture goals.

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Four Steps to Engaging Campaign Volunteers:

- Develop a list of desired volunteer skills and qualities.
- Identify potential campaign volunteers.
- Align volunteers with campaign opportunities.
- Be creative and take advantage of opportunities to build relationships year round.

Chair Positions: Whether you have one campaign chair or a large number of sub-chair positions, these volunteers serve as your core leadership. It is essential that individuals recruited to these positions are passionate about the YMCA, committed to campaign best practices and inspiring to other volunteers. Recruitment to these positions should be planned for with great diligence in advance of any other recruitment.

Chairs Round Table/Major Gift

Campaign: The Chair's Round Table (CRT) campaign seeks major gifts, typically \$1,000 or more. Securing these high level gifts requires a commitment to a relationship based, donor-centered approach. Campaigners for this segment must not only make a personal gift at this level but be committed to working with staff to carefully plan a personalized solicitation of each donor prospect. Remember that successful CRT volunteers play an important role in laying the foundation for future major gift efforts at your YMCA.

Member Involvement Teams

Campaign: Often referred to as the community campaign, this segment of annual campaign provides a multitude of important opportunities to engage volunteers at various levels of leadership. Many Ys model a structure with three different levels of volunteer captains in addition to the community campaign volunteers. This segment is an important opportunity to raise awareness of the YMCA mission and engage new supporters. Reviewing your volunteer prospect list with attention to this overall objective as well as individual strengths will help you determine which campaign position is the right one for each prospect.

Special Opportunities: Many YMCAs are finding success in building volunteer involvement and experience through leadership in year-round stewardship activities. Involving volunteers in these activities provides the opportunity to become more comfortable increasing awareness of our charitable mission outside of a solicitation. Thank you committees are also helping to steward donors while empowering volunteers to be a part of the annual campaign process.

Find the Right Volunteer continues on page 11

Narrowing the Gap



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As a new CEO in an association with a history of marginal fund-raising, it was clear that the immediate and primary focus needed to be centered on efforts to narrow the gap between the programs and services we provide to the community and the funds we raise from the community. Simultaneous with my tenure as CEO, the economy of the nation and our community began to tail-spin, resulting in greater numbers of residents in need of our services and fewer dollars available for non-profit organizations. Yet, the strong, nation-wide reputation of the YMCA for serving communities in both good times and bad times was a source of confidence and comfort. I knew we had wind in our sails.

To establish fund-raising as an intentional, fundamental and effective aspect of daily operations requires two critical elements:

- The full and instructive engagement of the CEO.
- The creation of a culture that is compatible with the mission, vision and projected outcomes.

From the beginning, the CEO sets the stage to develop a culture in which the proven practices of the art and science of fund-raising can thrive in the organization. To do so, requires that the CEO consistently model behaviors and communicates clearly that fund-raising is a priority. The organization's messaging and actions must clearly articulate that there is passion for the mission, a clear and vibrant vision, ambitious and worthy goals, a desire to serve more people, and that the process is year round and never ending. To this end, appropriate time and resources must be invested in the staff and volunteers, first to establish and instill the culture and secondly to teach fund-raising fundamentals. If we are successful in this phase of the plan, it becomes evident that fund-raising is a by-product of the culture we create.

As I began taking the essential steps to establish the necessary culture, foremost was the decision to hire a development director for the organization. Next, we made a substantial investment in the fund-raising process, taking 15 key staff and volunteers to the NAYDO Conference. Each member of our delegation was given particular assignments so that as a group, we covered all of the essential sessions available during the conference. At the end of the day, we met to debrief, share what we had learned, and connect the dots of fund-raising.

Upon returning home, the NAYDO participants became our fund-raising planning committee, meeting monthly to continue the learning process of successful fund-raising and eventually discovering that indeed it requires a well-defined process to be successful.

The essential ingredients for our campaign mirrored the proven practices noted abundantly in fund-raising literature and it began with training. The committee learned about and developed the essential case statements linking the needs of the community with strategic funding sources. The materials and collateral presentations were tailor made for specific and targeted audiences, along with testimonials from persons previously served by our association. They learned of the power of face-to-face solicitation and telling the story. They also learned that fund raising by event is not compatible with the philosophical principles that lead to long-term success.

Committee members recruited other volunteers and began using the well-defined protocols of successful fund-raising. We followed the process of sequential patterns, beginning our campaign with leadership gifts from board members and staff, followed by major gifts solicitation, securing previous donors, prospecting new donors, and developing a process for volunteer recruitment and leadership. Throughout the campaign, staff and volunteers are reminded of the value and significance of the personal touch.

Equally important to the personal aspects of raising funds, are the concepts of recognition and celebration. Recognition must be genuine, immediate, personal and public, involving such things as donor recognition boards, thank you notes, photographs, accolades at

“... appropriate time and resources must be invested in the staff and volunteers, first to establish and instill the culture and secondly to teach fund-raising fundamentals.”

annual meetings and efforts to further engage donors with the organization. In addition, separate but comparable recognition must be extended to the team of staff and volunteers who manage and execute the campaign. We celebrate our efforts,

our accomplishments, our camaraderie and most of all, the impact we have had on the people we serve.

Although we still have a long way to go, we are narrowing the gap between what we know the community needs and deserves and what it costs to expand and deliver quality programs and services across the community. We continue to strive towards an internal culture that understands and supports the mission, that believes in the vision, that works tirelessly to achieve ambitious goals and a team that is committed to doing what is necessary to narrow the gap.



ONE WORLD ONE YMCA

29th Annual NAYDO Conference on YMCA Philanthropy

April 7 -10, 2010 • Westin Charlotte



NAYDO Conference Keynote Speakers

Executive Leaders Session: Thursday

Neil Nicoll

President and CEO, YMCA of the USA

Scott Haldane

President and CEO, YMCA Canada

Dr. James Applegate

Senior Vice President, Program Development
The Lumina Foundation for Education

Opening Luncheon: Thursday

Sponsored by DAXKO

Barry Libert

Social Networking Expert/Author

*The Impact of Social Networking on
Philanthropy and Its Relevance in the
Nonprofit World*



Eagle Award Banquet: Thursday

Sponsored by Blackbaud

James (Jim) H. Morgan

CEO, Krispy Kreme Doughnuts, Inc.
Former Chairman of the Board, YMCA
of Greater Charlotte

YMCA Mission Possible:

Create a Legacy of Service Through Giving Back



Breakfast Keynote: Friday

Sponsored by Lighthouse Counsel

Kay Sprinkel Grace, CFRE

Transforming Philanthropy, LLC

Beyond Fund Raising:

High Impact Philanthropy



Closing Brunch: Saturday

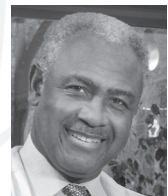
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Former mayor of Charlotte

Recapturing the Value Proposition:

Building Community Will Grow Your YMCA



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Maximizing Volunteer Impact: Get the Right People in the Right Jobs

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relationships with others, knowing that your efforts are paying off in building a stronger community within your YMCA.

Provide Training and Support

You can't expect your volunteers to know what you need them to do without the proper training and preparation. For example, if they've agreed to campaign for the first time, make sure they complete the proper annual campaign training, which includes information on your case for support and how to articulate the case during the campaign. YMCA data from Cygnus Applied Research, Inc. in the last few years has shown that YMCA volunteers sometimes don't clearly ask for campaign donations during their visits and they fail to ask long-time donors to increase their gifts – even when the donors are interested in doing so. These are critical elements of annual campaign success and they won't happen without our volunteers receiving the proper training, practice and support. In addition to the formal campaigner training, some other training techniques to try are:

- Meet with campaign volunteers for one-on-one role playing sessions. You can include more experienced volunteers in this exercise. Small meetings can be more relaxed and focused for the campaigner.
- Provide talking points and your case statement for advance reading and preparation, and provide opportunities to answer questions about the case and the campaign process.
- Partner new campaigners with more seasoned successful campaigners
- Help new campaigners experience success early on by pairing them with a staff member or another volunteer for their first meetings with key donor prospects.

Stewardship, Stewardship, Stewardship

Perhaps even more than your valued donors, high-impact campaigners deserve thoughtful expressions of appreciation, as well as training and support, on an ongoing basis. Don't forget, volunteers work for intrinsic rewards; recognition and appreciation is the only compensation we offer in return. Let's make sure we don't under-pay our valued volunteers. One key way we convey our thanks is through ongoing training and development; this both keeps campaigners' skills up to date and maintains their involvement with us. Cygnus Research also has shown that long-time campaigners can sometimes get into a rut, losing enthusiasm and just go through the motions of campaigning. In some cases that means campaigners fail to ask repeat donors for bigger gifts, even if the donors are willing to do so. It's up to us to keep the campaign exciting by providing compelling case statements and creating a lively campaign populated with enthusiastic, well trained volunteers. If we create positive experiences that are tied to the work our volunteers most enjoy, we keep them actively involved, with increasing dedication over time. What's more, we create winning volunteer teams that have the added benefit of attracting additional new volunteers who want to join those winning teams.



Engaging Volunteers for Member-Donor Growth

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objective was to make the "ask training" interactive and get volunteers to ask questions.

- Give campaigners a specific dollar amount and phrase to use when asking for a donation from a member who had never given before. "I'd like you to consider a gift of \$100 to the Strong Kids Campaign."

7. Be flexible about solicitation methods

It has long been emphasized to campaign volunteers that they must make their ask in a face to face situation. Have you ever been frustrated with the number of campaigners who just will not do this? We tried a new approach in 2009. We freed our volunteers of the face-to-face requirement. Campaigners were trained and encouraged to ask in whatever way works best for them, as long as they actually have two-way communication with their prospect. This is especially important when attempting to increase the number of member donors. For example, campaigners may prefer to initiate contact with their prospective member-donors by sending an e-mail, but they also need a response from their prospect with a "yes" or "no." If volunteers don't hear back from the prospect after the initial contact – whatever the method - encourage them to try again or find another way of contacting the prospect to "close" the solicitation.

8. Get feedback on each prospective donor

If you are looking to retain member donors from year to year, then you will need your volunteers to tell you if and how they contacted each of their prospects (phone, e-mail, letter, informal hallway meeting, etc), and how the member prefers to be contacted in the future. We developed a card with member information that we obtained from our member database and modified for the purposes of this pilot program. Volunteers could record their method of contact, response from the prospect and the

Continues next page

prospect's preferred future method of contact. This information was not filled out consistently by every campaigner; in some cases we needed to call the campaigner directly to complete this information.

Our 2009 Results

Our campaigner training achieved its highest attendance ever – 90 percent, or 40 out of 44 new campaigners attended training.

In terms of solicitations, new campaigners' close rate, or percentage of solicitations that resulted in an actual donation, averaged 40 percent, which was very close to that of returning campaigners. In other words, for every five people that a new campaigner asked, two made a donation.

The feedback from new campaigners regarding this year's training and their campaigning experience was overwhelmingly positive. Volunteers gave themselves a six out of seven points when it came to "understanding the case for support." The majority felt that the best part of campaigning was "feeling that they were serving the YMCA" and "feeling that they were serving their community." More than half said that they planned to campaign for the YMCA this year.

YMCA members can be one of the best sources for increasing annual contributions. As this project demonstrates, well-trained and motivated volunteers are an invaluable tool for communicating the philanthropic mission among YMCA members and helping create a sustainable donor base.



Find the Right Volunteer for the Right Role

Continued from page 6

YMCAs that have engaged volunteers in making calls to thank donors both immediately following a pledge/gift or as a campaign update midway through the year are experiencing success in growing future donations as well as building a strong volunteer base for the future. There may also be other special opportunities at your YMCA where intentional focus and strategy on volunteer acquisition and development garner success in the long-term.

Seize the Occasion

The YMCA of Greater Seattle recognized the 100th anniversary of YMCA Camp Orkila in 2006 with a series of centennial events. These events were designed to honor all the ways camp had touched the lives of so many past participants, volunteers, & community leaders. After many discussions, it was identified that the desired outcome for a successful event was a focus on celebrating the alumni first and foremost. This would only be possible by honoring the incredible alumni network – something that is vital to the past success and critical for future generations.

The centennial events created a level of enthusiasm, renewed interest and a sense of being part of history that made even the most distant of alumni want to get involved. Careful attention was given to not over-extend, stray from the desired outcomes or solicit gifts during the centennial weekend. It was recognized that Camp Orkila alumni wanted a chance to sit back, connect, and generally get re-acquainted with the current day version of camp.

Since the centennial events, there has been tremendous success from this friend-raising approach. In renewing connections with the alumni, a foundation was created to grow relationships and transition alumni as event participants to volunteers and annual campaign donors. People who had been distant or out of touch, were now regularly updated and communicated with about Camp Orkila news and current events. More alumni volunteers started showing up at work weekends and there was an impressive increase in alumni donors of 30 percent in 2007.

In the end, it wasn't the events, family camp skits, film documentary or speeches that made the 100th anniversary an alumni networking and volunteer cultivation success. It was recognition that the 100th event was a cannot-miss opportunity to engage people. By recognizing the people that made it possible for Camp Orkila to reach 100 years, the celebration unlocked a way to engage prospective volunteers and donors and it all started by hearing their YMCA story.



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NAYDO

NORTH AMERICAN YMCA
DEVELOPMENT ORGANIZATION

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USA

We build strong kids,
strong families,
strong communities.



Plus de vie à la vie
des jeunes, des familles
et de la communauté.

YMCA

NAYDO North American YMCA Development Organization

NAYDO Mission

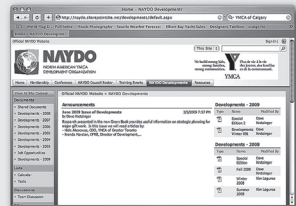
Throughout all aspects of YMCA work, NAYDO strengthens the mission and values of the YMCA through the advancement of philanthropy.

Statement of Purpose

To lead, support, and advance the development of YMCA professionals, volunteers, YMCA associations in the philanthropic work of their YMCA through training, education, advocacy, research and knowledge sharing.

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