

# Volunteer Management

Elizabeth Anderson, Lafayette  
Skylar Beaver, Hobart and William Smith

# Goals of Presentation

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- Discussion on Volunteer Management at STAFF Schools
- Best Practices: Online Modules, Recruitment, Training, Timelines/Duties, Recognition, Retention
- What you always wanted to know about STAFF school volunteer programs- now is your time to ask!

# What we do at Lafayette

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# What we do at HWS

## THE ANNUAL FUND

### Ways to Give

<b>Small Gift</b> Robert and William Smith College accept MasterCard, VISA, American Express and Discover. A credit card form is available in all Fund mailings, including between and pledge newsletters. Credit card gifts can also be made over the phone to a volunteer at 877-4885-GIFT, or online at <a href="http://www.hws.edu/donating">www.hws.edu/donating</a> .
<b>Checks</b> Checks should be made payable to Robert and William Smith Colleges and sent in the envelope provided in the Annual Fund solicitation mailing, or addressed to: Robert and William Smith Colleges Annual Fund 1405 S. Main Street Lewis, NY 14605
<b>ROP</b> The Robert and William Smith Colleges are pleased that you have agreed to make a pledge. The pledge is a commitment to give \$25 a year for 10 years. This must be set up using a credit card or direct debit from a bank account. The volunteer receiving the pledge, via email, will receive the necessary information to set up a new quarterly, monthly, and the amount per installment. Please note that our fund year ends on July 31, so all installments must be completed by that date in the same fund year.
<b>Gifts</b> Gifts of securities can be made. Please call the donor to contact the Alumni House directly at 1-877-4885-GIFT.
<b>Matching gifts</b> Corporate and foundation matching gifts are a great way to double or triple a gift you are making. Matching gifts also must meet a giving criteria designation. We recommend that you ask if the donor or donor's spouse needs this company that matches gifts. The employer's Human Resources office will provide the necessary paperwork that should be sent to Robert and William Smith with the gift.

### The Emerson Society and the Importance of Leadership Giving.

MEMBERSHIP: only \$1000 or more during the fund year.  
YOUNG ALUMNI: only \$100 or more per year (minimum \$10 in 10 years).

Membership in The Emerson Society is achieved through gifts to Robert and William Smith Colleges totaling \$2,000 or more during the fund year. All alumni, current, parents and friends are invited to add their names to the ever-growing list of those who share leadership in their giving to the College.

**The Emerson Society levels of giving levels:**

- Founding Circle \$2,000-4,999
- Pioneer Circle \$1,000-1,999
- Patron Circle \$500-999
- Sustainer Circle \$250-499
- Friend Circle \$100-249
- Sustainer Circle \$50-99

### Glossary of Terms

The Annual Fund raises funds for the operating expenses of the College each year.

**Family Fund:** Subsets of the Annual Fund, consisting of gifts made by parents of current students and parents of alumni and alumnae.

**Corporate Matching:** A.k.a. Matching Gift—certain corporations will match a gift made to an institution of higher education by their employees at a ratio of 1:1, 2:1 or 4:1.

**Endowment:** An endowment is a large fund created from gifts that provides income (through interest earned) in perpetuity to an institution.

**Capital Gift:** A capital gift is a gift that is used specifically to pay for construction, renovations, equipment purchases, etc. It is a one-time use gift that has a restricted purpose. The Bessie Beardslee is an example of a capital gift.

**Fund Year:** The Annual Fund operates on a June 1 to May 31 calendar year. Thus, all pledges can be paid up through May 31 and must meet the current fund year. This is a yearly change in fund year numbering.

**Designated Gift:** A gift that the donor specifically designates for a certain purpose, fund, scholarship, etc.

**Undesignated Gift:** A gift that the donor does not designate for a specific purpose. Undesignated gifts provide flexibility so that the College can use the funds for the most pressing need (HWS' Current Program). The undesignated gifts program for the Annual Fund. The values of the HWS Current Program is to provide information about the College and to engage philanthropic, corporate, and individual alumni and alumnae in helping the College achieve their mission: "Wishes of Excellence, Love of Consequence."

## THE ANNUAL FUND

### Volunteer Guide



### HOBART AND WILLIAM SMITH COLLEGES

## October & April are Class Agent Outreach Months

Agents make classmate selections, receive HWS Volunteer Guide (includes individual Prospect Report) and then receive Progress Reports as updates

## THE ANNUAL FUND

877-4885-GIFT or online at [www.hws.edu/donating](http://www.hws.edu/donating)

### What is the Annual Fund and why is it important?

The Annual Fund is an essential element of Campaign for the College. The College needs operating income from the endowment and tuition dollars. Not revenue from the Annual Fund alone the gap between the income from those and other resources and the actual expenses of the College. In other words, the Annual Fund serves to balance the College's checkbook each year.

The College has to provide everyday things such as student reading and other materials in the hundreds of journals in the library, the food in the dining hall, the salaries of student workers, staff and faculty. In fact, no gift to the College has a more immediate impact on today's students than those made every year to the Annual Fund.

### 5 Five Reasons to Support the Annual Fund



**1. A Gift to the Endowment of Robert and William Smith Colleges**  
Students choose to attend the College because of the high quality education made available. The Annual Fund provides for students that make the Robert and William Smith experience exceptional.

**2. Scholarships**  
For many alumni and alumnae, the College has played a defining role in their lives. Academically and socially, that HWS experience helped them reach success and establish a rewarding life beyond college. Giving to the Annual Fund is a meaningful way to share gratitude.

**3. Providing Scholarships and Financial Aid**  
One of the College's goals is to make the HWS experience available to students of various backgrounds and abilities to pay. Annual Fund giving is a key source of support for financial aid. More than 80% of current Robert and William Smith students receive financial aid (scholarships, in part, by the generosity of alumni).

**4. Investment in the Future of Robert and William Smith Colleges**  
Many alumni and alumnae feel that their gift to the College is an investment in the value of their own degree. The value of a Robert and William Smith degree is based on the reputation of the College today. Annual Fund gifts would assist and provide new programs that address today's educational needs.

**5. Loyalty to the College**  
Alumni and alumnae often feel a sense of loyalty to their alma mater and wish to share this through gifts to the Annual Fund. It is a way that alumni can make a difference for the institution. Every gift is a way to be appreciated.

### Preparing for the Call

**Make your own pledge or gift**  
Before your call, make your own pledge or gift to the Annual Fund. It's much easier to "join me" in supporting the Annual Fund when you have made your own commitment to the College.

**Make connections**  
Get acquainted with the alumni and alumnae you are calling by reviewing their information on their Prospect Report. Find out where you can make connections.

**Family Fund program**  
Focus on the Family Fund program at Robert and William Smith. Visit the College's website for daily updates at: [www.hws.edu](http://www.hws.edu).

**Establish a case for giving**  
You don't need to memorize facts and figures, but you should be familiar with the rationale for making annual, unrestricted gifts and the potential those gifts support. Be prepared to explain why you are excited to serve as a fundraising volunteer for HWS.

### The Call

Consider sending a letter or e-mail in advance of the phone call. This allows for thoughtful consideration of a gift.

**Always be a respectful professional.** When an alum calls, they will confirm that he/she will be spending a gift, but will not share the specific amount. Do not haggle and insist that you receive actual dollar amounts back to be credited to credit card progress toward your goal and to keep us moving in the right direction. If you are not sure, please call us. We have the greatest success with alumni and alumnae willing to make their specific dollar amount have been identified.

**When talking for a significant gift interview, allow the alum to read some time for consideration. If appropriate, plan the time for another contact during the first call.**

**Be prepared to handle objections.** Sometimes you will encounter a situation where an alum has specific objections or concerns. Listen to the heart of your objection. Put the alum in "I don't know," I will find out, and I will get back to you." If information is required, promise to get it and ask for help from a staff person in Alumni House.

**If the person is resistant to give, it is important to encourage participation at another level. Every gift makes a difference at HWS.**

**Gifts are all valuable contributions.** Remember you are selling a dollar value that has been supported by the College in the past. People find it necessary to use "no" for many reasons - all of which are good reasons to them - and should be to you. Whenever the reason is to not take a "no" personally but to be encouraging you to bring in another ongoing relationship with them in your following call.

**If the alumni share a specific reason why they will not support the College, such as disagreement about a particular policy, please note this to that someone from the College can respond to their further discussion, if appropriate.**

**Remember to call web pages you call if you call will have a matching contribution from their employer or other organization, and marks that accordingly.**

### After the Call

Be sure to write down any notes from the call including contact information updates and any gifts or pledges. When your call is complete, return all materials to your staff person in Alumni House.

### HOBART AND WILLIAM SMITH COLLEGES

### Suggested Responses to Common Questions and Concerns

**May I direct my gift to the Annual Fund for Robert and William Smith for a specific department or program?**  
We accept any designates a gift to the Annual Fund as one has been given in supporting. There is space on the commitment form (included in mailings, or please note on Contact and Solicitation Report) for a donor to make a designation to the following:

- The College's Current Needs
- Scholarship Support
- Career Planning
- Career for Teaching and Learning
- Generational Study
- Technology
- Library Support

**I can't possibly make a gift of that size!**  
A gift can be spread out over many months and does not need to be completed in full until the end of the fund year. Remember credit card charges are a nice way to make smaller gifts throughout the fund year.

**I cannot give right now.**  
A pledge can be renewed at any time. If a commitment is made in the form of current, pledge renewals will then be sent periodically that the gift needs to be paid. A pledge payment can be spread out over several months, with completion due by the end of the fund year.

**I did not receive financial aid. Why should I help others?**  
Even if you paid full tuition when you attended HWS, you did not pay the actual cost of an HWS education. Tuition covers only 10 percent of the actual cost. The Annual Fund, with endowment earnings and auxiliary enterprises, provides the other 90% of the cost of Robert and William Smith.

**I suggest other causes that have greater need.**  
By giving to the Annual Fund, you are ensuring that there will be future generations of men and women who will work for and with the cause you support. Contributions to the Annual Fund allow today's students to become tomorrow's leaders.

**I will not give because of a particular Robert and William Smith College policy or issue.**  
After about one year to review their options. If asked for your opinion, use your own judgment. The cost to you equals the person. Depending on the issue, it may be appropriate to close the call as quickly (yet professionally) as possible. If you wish to respond, use the "no" response: "I do have my own experience that..." There is no one who is specific request for additional information or then follow-up by a College administrator is necessary. If possible, remind the alum that the Annual Fund gifts benefit people, specifically the current students of Robert and William Smith. The larger portion of the money would provide financial aid and faculty support.

**I just sent my gift.**  
The phone call has become a thank you call. Thank your prospect for supporting the Annual Fund.

# What we do at HWS cont.

Home and  
Business  
Contact  
Information

E-mail  
Address

HOBART AND WILLIAM SMITH COLLEGES						
Class Agent Report for Skylar A. Beaver						
Mr. James E. Landi	Hobart Graduate Nickname: Jamie	Class of 2008	B.A., 2008	Political Science		
Home Contact Information: 435 South Main Street, Apt. 4 Geneva NY 14456-3154		Business Contact Information: Sustainability Coordinator Hobart and William Smith Colleges Finance Office 337 Pulney Street Geneva NY 14456		Sport(s):	Sailing	
Preferred E-mail: landi@hws.edu		Target Ask: \$100.00		Activities:	Dean's List Dean's List Dean's List Dean's List	
AF Giving:	2007-08 \$50.00	2008-09 \$109.00	2009-10 \$168.00	2010-11 \$223.00	2011-12 \$100.00	Lifetime \$650.00
Other Giving:	\$0.00	\$30.00	\$100.00	\$125.00	\$0.00	\$255.00
Ms. Andrea B. Rosenthal	William Smith Graduate Nickname: Andy	Class of 2008	B.A., 2008	Architectural Studies Art Concentration Studio		
Home Contact Information: PO Box 6177 Breckenridge CO 80424-6177		Business Contact Information: Part Time Ski Pro Vail Resorts Breckenridge CO 80424 (970) 453-3000		Sport(s):	Soccer Ice Hockey	
Preferred E-mail: andrea@br@gmail.com		Target Ask: \$50.00		Activities:	Dean's List Dean's List Hillel	
AF Giving:	2007-08 \$20.08	2008-09 \$20.08	2009-10 \$10.00	2010-11 \$0.00	2011-12 \$5.00	Lifetime \$55.16
Other Giving:	\$0.00	\$25.00	\$25.00	\$0.00	\$5.00	\$325.00

## Sample Prospect Report

### FY 12 CLASS AGENT PROGRESS REPORT

5/22/2012

	<u>FY 12 AF Received</u>	<u>FY 12 AF Pledge Balance</u>
James E. Landi	\$100.00	\$0.00
Andrea B. Rosenthal	\$5.00	\$0.00
	<b>\$105.00</b>	<b>\$0.00</b>

## Sample Progress Report

My "prospects" → **Skylar A. Beaver**  
James E. Landi  
Andrea B. Rosenthal

100.00% (2 out of 2) gave/pledged

Shows my progress

# Online Module vs. “Old School” Volunteer Management

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- Who is using an online module vs. the “old school” method?
- For online module vol users: what do you wish you would have known? What changes would you make to your system? Do your volunteers use it the way it was intended?
- For “old school” vol managers: what do you want to know about STAFF schools’ online modules or why are you content with what you have?

# Recruiting Volunteers

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- How do you identify new volunteers?
- How do you recruit them?
- Who recruits them?

# Training Volunteers

- Who is training their volunteers best?
  - Tell us your secret!

On-campus  
training  
session

Print and  
electronic  
training  
manuals



Off-campus  
training  
session

Regional  
training  
sessions



# Timelines/Duties

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- When are your volunteers doing outreach?
- How do Class Agents overlap with student calling programs and staff member prospect management?
- How much freedom do your volunteers have when “authoring” solicitation letters?
- How do you communicate goals and report out on progress with your agents?

# Recognition

## ● How are you **THANKING** your volunteer

Special note

Gift

Recognition  
Event

Video  
Message

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



“Insider”  
information

Discount to  
College Store

Honor Roll  
Listing

# Retention

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- ◉ How are “terms” communicated?
- ◉ How do you “fire” a bad volunteer?
- ◉ Class Agents and Reunion?

What you always wanted to know about  
Volunteers but never had the opportunity to ask?

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- Staffing Structure
- How do you get your volunteers to REALLY do the work
- How to build accountability with volunteers
- Transforming an inactive volunteer into an active one
- Working with other campus volunteer managers to collaborate