

FUTURE OF NURSING™

Campaign for Action

AT THE CENTER TO CHAMPION NURSING IN AMERICA



Volunteer Engagement Toolkit

Action Coalitions benefit substantially from the involvement of volunteers in all facets of their work, from helping carry out core pillars of the mission-driven work to helping ensure that the Action Coalition is well organized and sustained over the long term. The engagement of volunteers in fundraising activity is another important way that those individuals committed to the Action Coalition can help support and sustain its mission.

This toolkit provides resources for Action Coalitions to involve volunteers in helping advance fundraising work. In many cases, this is as simple as suggested a potential donor or making an introduction. For volunteers helping lead fundraising activity, this will include more face-to-face interactions with potential donors and asking for gifts. However, there are roles that all volunteers can play based on their comfort level.

This toolkit includes exercises that are appropriate for all volunteers, regardless of the area of their work with the Action Coalition, as well exercises and resources for fundraising-focused volunteers. If your Action Coalition does not already have a group focused on fundraising, you might consider forming a Development Committee to lead this activity; role descriptions for this group are included at the end of this toolkit.

Circle of Influence Exercise (for all volunteers)

A circle of influence exercise is an important method to help your Action Coalition broaden its base of support by asking each volunteer to identify up to 3 individuals they know and can introduce to the Action Coalition within each sphere (see attached worksheet).

Review the completed worksheet with each volunteer, and walk through the following questions to develop a strategy for each identified name:

- What about the Action Coalition will likely be of interest to the prospect?
- What do you know about the prospect's philanthropic involvement with other organizations?
- How can we best engage the prospect with the Action Coalition (event invitation, one-on-one meeting)?
- Are you willing to introduce someone from the Action Coalition to this prospect?
- Are you interested in helping cultivate this prospect for a gift?

Peer Screening (for all volunteers)

Peer screening is a method to identify prospective major donors, estimate their ability to support your Action Coalition, and to determine linkages between and among current volunteers and

prospective donors. A screening session may also result in preliminary strategies, relying on personal knowledge, for approaching specific individual prospects.

The Action Coalition will convene a series of screening sessions that volunteers can participate in—perhaps even as a portion of existing working group or committee meetings. Participants will be asked to:

- Attend the confidential meeting to review a list of prospect names.
- In confidence and without attribution, share insights, knowledge and thoughts about each prospects' capacity and propensity.
- Offer suggestions on how to begin cultivating and engaging these prospects – ways to open the door and/or identifying volunteers who may be the most appropriate “natural partner.”

New information obtained from the peer screening session will be input into a prospect database and utilized to inform strategies for increased donor engagement.

Qualification Visits/Calls (fundraising-focused volunteers)

The purpose of a qualification visit is to help the Action Coalition confirm a prospect's capacity and propensity to give. These visits are also an opportunity to better understand the inclination of each donor to give at a higher level and to gather donor perspectives on the various elements of the campaign case for support.

Visits should be scheduled with all promising prospects. These visits will provide the Action Coalition the opportunity to connect – one-on-one – with donors, listen to their story, determine what pillars of the work are of most interest to them, and deepen the understanding of each donor's personal motivation to give.

This process is critical in building long-term relationships with your Action Coalition. See the Sample Qualification Questions tool in this document as well as the Qualification tips within the Relationship Management Toolkit.

Small Cultivation Events (fundraising-focused volunteers)

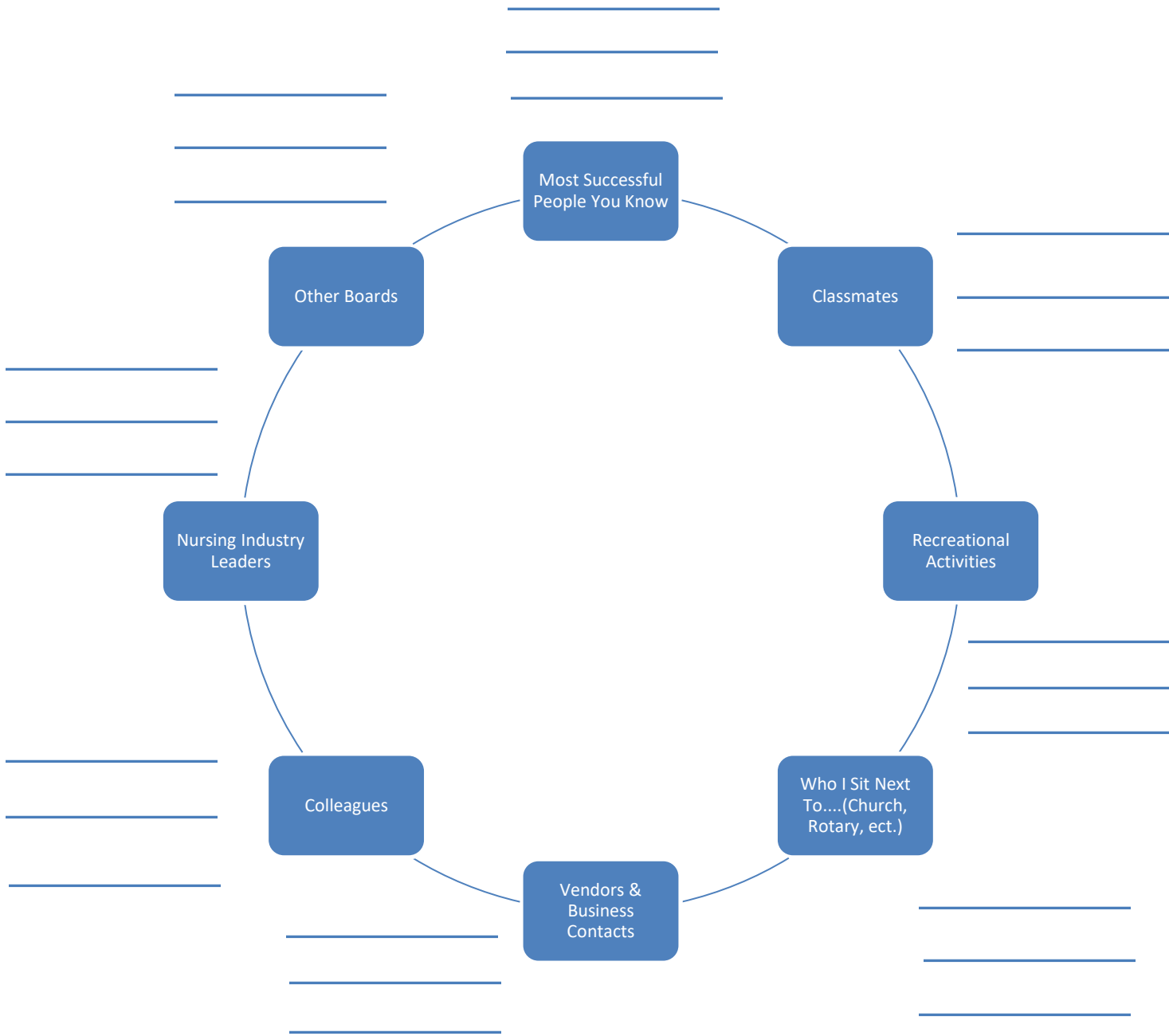
Cultivation events lend the opportunity to engage and educate potential and current supporters of your Action Coalition. The most successful cultivation events are small and intimate, providing the opportunity for volunteers to have an in-depth conversation with or provide a memorable experience for a donor/donor prospect.

The first step is to engage a volunteer to host an event, either in his/her home, restaurant or alternate setting as suggested by the volunteer that will convey a sense of exclusivity to the attendees. The attendees should not exceed 20-40 people to maintain an intimate setting.

It is important to remember that while the key objective of a cultivation event is to establish a relationship with individuals living in the community, the ultimate objective is to secure additional financial support.

When planning your cultivation event, reference the Special Event Planning Guide.

Worksheet: Circle of Influence



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Robert Wood Johnson Foundation



Worksheet: Peer Screening Exercise Template

Name	Personally Know	In My Network	Will Help Strategize	Will Make Introduction	Will Solicit	Notes (Do you think this prospect would be interested in/capable of making a significant gift? Why or why not?)

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Worksheet: Sample Qualification Questions

1. What inspired your first gift to the Action Coalition? (if appropriate)
2. What has kept you with us?
3. In your opinion, what distinguishes us from other organizations?
4. Is there anything that we can be doing better?
5. In what ways does our mission/work impact you personally?
6. What role do you think the Action Coalition plays within the nursing community?
7. What would you like to see the Action Coalition doing in the next five to ten years?
8. How have you been involved with other nonprofit organizations (as a volunteer, donor)?
9. What organizations are you involved with today?
10. How hands on do you like to be with organizations that you support?
11. What do you hope to accomplish with your giving?
12. How are giving decisions made within your family?
13. Tell me about the most important gift you've ever made.

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Development Committee Chair Role

The Development Committee Chair serves as [Action Coalition's] chief fundraising/development volunteer. S/he chairs the Development Committee meetings, encourages fellow committee members to complete their assignments, and cultivates and solicits key leadership and major gift prospects. The Committee Chair's primary focus is on securing individual, planned, and major gifts. The Chair is selected for leadership ability, "reach" and respect garnered from volunteers and staff.

The fundamental responsibilities for the committee chair in the first year include:

- Convene and chair meetings of the Development Committee.
- Identify and recruit Development Committee members and then lead and/or assist in securing their financial commitments. New Development Committee members can be recruited at any time.
- Lead by example through own commitment to the fundraising efforts of [Action Coalition].

As the committee matures, the committee chair's focus will expand to include the following responsibilities:

- Lead the Development Committee, along with staff (if applicable), in its review and approval of fundraising initiatives and policies.
- Lead the Development Committee, with the assistance of staff (if applicable), in its role to secure gift commitments from all board and committee members as well as commitments from selected individuals, families and family foundations and corporations.
- Accept an appropriate number of key individual prospects for cultivation and solicitation.
- Request and authorize the fundraising budget and monitor expenses.
- Act as the spur and motivator to help achieve fundraising success.

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Role of Development Committee

The purpose of the Development Committee is to advise and move forward the fundraising program, including gifts of all types. The committee will help set fundraising policies, work with staff (if applicable) and other volunteers to set annual goals and fundraising plans, and help engage the Board in fundraising activities.

The Development Committee, under the leadership of its Chair, will be composed of 6-8 members. The committee will meet quarterly, and more frequently as needed at the discretion of its Chair.

The fundamental responsibilities for the committee in the first year include:

- To assist in identifying and recruiting volunteers from among [Action Coalition's] constituents who can play an active role in the fundraising program.
- To demonstrate its commitment to the mission and welfare of the organization, each member must be willing to make [Action Coalition] a personal philanthropic priority.
- To review and approve [Action Coalition's] case for support and yearly requirements for philanthropic support.
- To serve as an advocate for [Action Coalition] and its fundraising efforts.

As the committee matures, the focus of the committee will expand to include the following responsibilities:

- To approve and help achieve realistic philanthropic goals.
- To ensure the [Action Coalition] has appropriate resources to meet its goals.
- To review and approve plans related to fundraising, including the fundraising operating plan and any plans related to special projects or fundraising initiatives.
- To assist in the identification, evaluation, cultivation and solicitation of selected individuals, corporations and foundations.
- To report regularly on the state of fundraising programs to the Action Coalition's leadership.
- To recommend policy with respect to development to the Action Coalition's leadership.

