

Best Bets

Best practices for your organization

By Laurel Kimball, Ph.D.

“Best practices” is a management term for optimal tactics and strategies. They do not guarantee success, but rather describe those tactics and strategies used in successful organizations. There are no absolute best practices in the fundraising profession or philanthropy, but many organizations have programs, products and practices that stand out. If you have suggestions or information about best practices that you would like to share, please email ap@afpnet.org.

Volunteers’ Wheel of Philanthropy

Do your volunteers and board members backpedal, hem and haw and change the subject at the mere mention of getting involved in fundraising activities? Are they more comfortable giving their own gifts than asking someone else for one?

Don’t worry. Their reactions are perfectly normal. The good news is that you have the ability to ease their fundraising jitters. Not only that, with guidance and coaching, your volunteers may just rise to the occasion and find that they actually *enjoy* the process.

While there is no one best way to get volunteers and board members happily involved in development efforts, education is a good first step to erasing fundraising intimidation. Your job is to show volunteers where they can fit in and to let them know, up front, that not everybody has to actually make the “ask.” Work within volunteers’ comfort zones. They can make a great contribution by opening doors and by simply being there to talk about their commitment to your organization. It all starts with a clear understanding of the cycle of philanthropy.

Your volunteers are invaluable in the **identification** phase because they know people. Their role in identifying prospective donors is the first key to your fundraising success. Consider a group activity, such as a wine and cheese icebreaker, before volunteers roll up their sleeves and brainstorm. Keep the informal lines of communication open with your volunteers,

encouraging them to pick up the phone or email their ideas.

Afterward, your volunteers can share their personal insights about the donor list you have compiled during the **qualification** stage. Their insider knowledge—that a particular donor studied architecture and supports his alma mater, for instance—may be the key needed to link the donor to your organization’s cause. Talk frequently with your volunteers so they will feel comfortable providing such sensitive information, and make them feel empowered by the development team.

When you want to engage a prospect and acquaint him or her with your organization, a volunteer can provide a nonthreatening presence. Activities at the **cultivation** stage can range from hosting an event at a volunteer’s home or taking a donor to lunch to meet your organization’s executive director to encouraging a donor to tour your organization.

Later, during the **solicitation** phase, a volunteer might be asked to accompany your institution’s leader during the “ask,” especially if the volunteer knows the donor well.

Volunteers also can play an important role in **stewardship** and accountability, making thank-you phone calls, having lunch with a donor or hosting

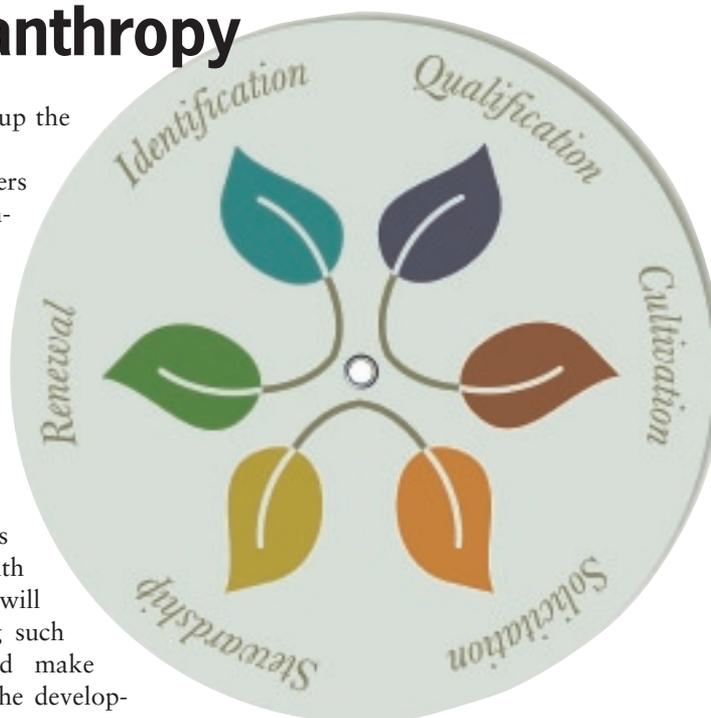


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an elaborate party. Then as the **renewal** stage begins, volunteers can be highly effective at soliciting previous donors.

So at your next board orientation, consider reviewing the solicitation cycle with volunteers and taking the time to explain the various roles they may play. Let them self-select—and watch their apprehension melt away. 🎯



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