Engaging Volunteers in Major Gift Fundraising

A Bentz Whaley Flessner Intensive Workshop

A 3-day immersion to help you enlist, prepare and support an effective volunteer corps that will enhance your cultivation and solicitation of major gifts.

February 10–12, 2015
Washington, DC
Marriott Wardman Park Hotel

Due to the intensive nature of this workshop, participation will be limited to the first 40 registrants. For more information and to register, go to: http://bwfengagingvolunteersworkshop.eventbrite.com.
OVERVIEW
An intensive workshop intended to prepare managers and fundraisers to find, develop, activate and support a cadre of effective major gift volunteers. Participants will leave the workshop with a toolkit of resources they can immediately put to use when they return to their institution, including:
- A suggested action plan for launching or upgrading a volunteer-driven fundraising effort.
- Templates, including volunteer job descriptions, reports, evaluation forms and more.
- Recommendations for conducting effective volunteer meetings.
- Sample training exercises.
- Checklists, including: necessary resources, planning and implementation steps, training, assessment, and more.

TENTATIVE SCHEDULE*
(*Subject to modification based on feedback and interests expressed by participants in the pre-workshop survey.)

Day One
1:00–5:00 pm**
Why Engage Volunteers in Major Gift Fundraising?
- Current trends and best practices in using volunteers.
- What volunteers can do.
- Fundamentals of effective volunteer engagement.

Who Volunteers—and Why (or Why Not)?
- Volunteer motivations, perspectives, and expectations.
- The five types of volunteers.

Principles of Volunteer Management
- Characteristics of an effective volunteer-driven fundraising program.
- Setting objectives and mutual expectations.
- A checklist of essential elements.

- Insights from BWF founder Bruce Flessner, including examples of successful and not-so-successful volunteer fundraising initiatives.

Day Two
8:30 am–5:00 pm**
Positioning Volunteers for Success
- Defining tasks and clarifying roles.
- How to delivering effective training.
- Establishing expected outcomes.
- Ensuring appropriate follow-up and next steps.

Addressing Volunteer Anxiety, Reluctance and Inertia
- Causes of volunteer hesitation or inaction, and effective antidotes.

Preparing Your Staff for Productive Volunteer Engagement
- Strategies for success.
- Common missteps in volunteer engagement.
- Providing adequate training for staff.
- Practicing problem-solving tactics.

Lunch

Case Studies in Volunteer Engagement (Part 1)
- Practice in addressing hypothetical volunteer scenarios.

Volunteer Leadership Panel
- Guest speaker Suzy Mink will lead a discussion with volunteer leaders from the Washington area, who will share lessons they learned through their own experience as volunteer fundraisers.

Case Studies in Volunteer Engagement (Part 2)
- Practice in resolving challenges provided by conference participants.***

Day Three
8:00 am–12:00 pm**
Organizing for Effective Volunteer Fundraising
- Exploring why some volunteer efforts flourish while others flounder.
- Impact of group size, purpose, support, complexity of tasks, resources, and other factors.
- Tips for conducting productive meetings.

Volunteer Structures
- Working with governing boards, advisory committees, task forces, and other groups.

Managing a Volunteer Program
- The challenges, expectations, and strategies for managing a volunteer organization.

Evaluating, Rewarding, Motivating and Retaining Effective Volunteers
- Insights and suggestions for keeping your volunteers motivated, enthusiastic, and increasingly productive.
- Strategies for sustaining and rejuvenating your volunteer programs.

** Registration includes continental breakfasts, morning and afternoon breaks, and lunch on Day Two.
*** Participants will be asked to bring 1-2 challenging volunteer scenarios that can be discussed openly with the rest of the attendees. If selected, the scenario will be reviewed and discussed, with the group developing possible solutions.
KEYNOTE SPEAKER

Bruce W. Flessner is a principal at Bentz Whaley Flessner, an international fundraising consulting firm serving colleges, universities and major medical centers in Asia, Europe, and North America. During his 30 years of consulting experience, he has served clients such as American University of Beirut, Boston College, Michigan State University, SUNY Stony Brook, and University of California-Los Angeles, University of Chicago, University of Michigan; University of Minnesota, University of Sydney, and many others.


WORKSHOP LEADERS

Chelsey D. Megli is a program manager of talent management and training programs at Bentz Whaley Flessner. She develops intensive sessions that focus on building the capacity, skills, and knowledge of deans, academic officers, boards and advisory committees, and frontline fundraisers. Ms. Megli also works with clients in the areas of talent management and strategic planning.

Prior to joining the firm, Ms. Megli worked at Children’s National Medical Center. She holds a bachelor of arts degree from the George Washington University and a master’s of arts degree from the American University. Her client work includes Michigan State University, the University of Sydney, The Cleveland Foundation, the University of Oregon, Bowling Green State University and the University of Wisconsin-Milwaukee.


Mark W. Jones is an experienced fundraiser, communicator, and team builder. He recently joined Bentz Whaley Flessner after two decades leading comprehensive advancement programs in higher education. Mark has been chief advancement officer at Goucher College, Wabash College, St. Norbert College, and Hollins University; he also served the University of Virginia as director of corporate relations and later as executive director of the Virginia Engineering Foundation after starting his career at Rensselaer Polytechnic Institute.

Active in his profession, Mark has been a volunteer leader and frequent speaker for the Council for Advancement and Support of Education, earning numerous “stellar speaker” designations at CASE’s national and regional conferences. Mark has also led training and professional development programs for Academic Impressions. In addition, he has provided counsel, coaching and/or interim leadership to several other organizations, assisting his clients with strategic planning, alumni programs, marketing and communications, volunteer training, and team building, and all aspects of private gift fundraising.

Mark is a graduate of Hartwick College and Cornell Law School, and he completed the Institute for Educational Management at Harvard’s Graduate School of Education. He served as president of Hartwick’s alumni association and recently completed his term on the Hampden-Sydney College parents council.

PANEL DISCUSSION LEADER

Suzanne (Suzy) Mink is an accomplished, highly regarded fundraising professional and a tireless, effective volunteer leader.

In her professional life, Suzy has served as a vice president for development at Drew University, CASE, World Wildlife Fund and the Elizabeth Glaser Pediatric AIDS Foundation. She also served twice as the Director of Development at Washington’s National Cathedral, serving first during the completion phase of the Cathedral’s 80-year construction and later as Senior Philanthropic Advisor at the time when the Cathedral required extensive repairs following an unusual 2010 earthquake.

Suzy has been a volunteer leader and fundraiser for numerous organizations, including with the National Cathedral Association and at Hollins University, where she has served on the Alumnae Board and as co-chair of her class’s record-setting giving campaigns. She has also served a board member for the Episcopal College of Preachers, Chase Collegiate School, The Choral Arts Society of Washington, Friends of the National Zoo, General Theological Seminary, the Arlington Arts Center, co-chair of the Soper Trust for the Episcopal Diocese of Washington, and vice chair of the Episcopal Church Foundation. A distinguished speaker, Suzy was among the first recipients of CASE’s Steuben Apple, which is given to the organization’s leading conference teachers.

She currently serves as senior philanthropic advisor at Hollins, her undergraduate alma mater and where she formally began her career in advancement following graduation. Based in Washington, DC, she is responsible for Hollins’ principal gift efforts, in which she partners with the University’s president, trustees and volunteers to enhance engagement and support from the university’s top current and prospective donors.

Suzy has a BA in Spanish and Art from Hollins and pursued graduate studies at the Universidad de Salamanca; she also has a Masters of Arts in Teaching with a concentration in Spanish from the University of Virginia. She is an accomplished runner and triathlete, and last year represented the United States as a member of Team USA for the Age Group Triathlon World Championships.
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Description and Benefits
Is your organization maximizing the resources and time of volunteers? Do you have clear expectations and strategies for your volunteers and board members to be partners in fundraising? Volunteers can make the difference in fundraising and campaign success. Join Bruce Flessner and the TalentED team for this intensive 3-day workshop that will (1) share best practices in volunteer engagement, (2) grow understanding and critical thinking around your organization’s current and potential volunteers, and (3) build skills and strategies for elevating your volunteer engagement to the next level.

Our program will offer crucial insights, rich content, intensive exercises, live demonstrations, meaningful role-playing, and practical advice on how to enlist, prepare, motivate and retain productive volunteer fundraisers. You can expect to walk away with an expanded repertoire of strategies, tactics, training exercises and other resources that you can immediately apply when you return to campus.

Intended Audience
This workshop will be of great value to fundraising leaders (VPs, AVPs and DoDs) looking for strategies and tools in developing and leading a volunteer-driven effort, campaign directors, managers of volunteer engagement programs, and frontline fundraisers just beginning to work directly with fundraising volunteers.

Other Details
- Conference begins at 1:00 p.m. EST on Tuesday, February 10 and concludes at 12:00 noon on Thursday, February 12.
- Price: $900 for Bentz Whaley Flessner clients; $1,100 for non-clients.
- The workshop will take place at the Marriott Wardman Park Hotel, which is located in one of Washington’s most charming neighborhoods and offers access to a multitude of shops, restaurants and activities. The hotel is also located just steps away from the Woodley Park/Zoo Metro stop.
- Registration includes continental breakfast on Days 2 and 3; lunch on Day 2, and snack breaks throughout the program.
- All participants will receive a customized workbook filled with practical, adoptable resources.
- Participants who attend this workshop will receive a 15% discount on all future 2015 BWF workshops.
- Coming soon: The 2015 BWF/TalentED Workshop Series schedule. (Check back at www.bwf.com for more details.)

Questions?
Email us at training@bwf.com for more information.

Visit http://bwfengagingvolunteersworkshop.eventbrite.com to register for the workshop. (Please note: Participants needing overnight accommodations are responsible for securing the lodging of their choice.)