

Welcome!

Champions for Fundraising: Enroll Your Dream Team!



Purpose & Intended Result



Purpose: For participants to be empowered and inspired to enroll more members of the camp committee/board of directors in resource development activities

Intended Results:

- ★ To recognize current limits and future possibilities for camp's impact by growing your fundraising team
- ★ To understand the enrollment process, how it works, and its potential for expanding camp's fundraising capacity
- ★ To recognize the abundance of potential Dream Team members already in your camp's orbit
- ★ To identify an initial group of prospective team members with whom to have enrollment conversations
- ★ To develop a set of action steps to take right now to begin enrolling new members of your team
- ★ To have fun with this new concept – bringing more joy to your fundraising

Agenda

Welcome

Purpose & Intended Result

Agenda

Why Bother with Volunteers?

The Abundance of Human Resources at Your Fingertips

The Enrollment Conversation

What is Your Dream Team?

Using Enrollment Conversations to Build It

Veritus Group Metrics for Major Donor Programs...

- Total Dollars Raised
- # of Meaningful Conversations
- # of Stewardship Calls
- # of Asks
- Working the Plan for Each Caseload Donor
- How Did Each Donor Perform from Year to Year?

Start Discovery meetings to determine who is interested in engagement.

Use Discovery Meetings to Discover what people have in abundance (interests, ideas, resources, etc.) and if/how they want to play.

Create POOL of donors

LIFE CYCLE OF A MAJOR DONOR

Bring Marketing and Mass Communications into Plan, if that is appropriate for the donor.

Use Info from Meeting to create a customized plan

Set a Goal and establish strategies and custom steps

Bring Marketing and Mass Communications into Plan, if that is appropriate for the donor.

Work the Plan

Clean up data and segment



BREAKOUT for 5 minutes

- 1. Assign a note taker.**
- 2. Make a list of 5-10 things you could do to *absolutely fail* at enrolling volunteers to be on your development team.**

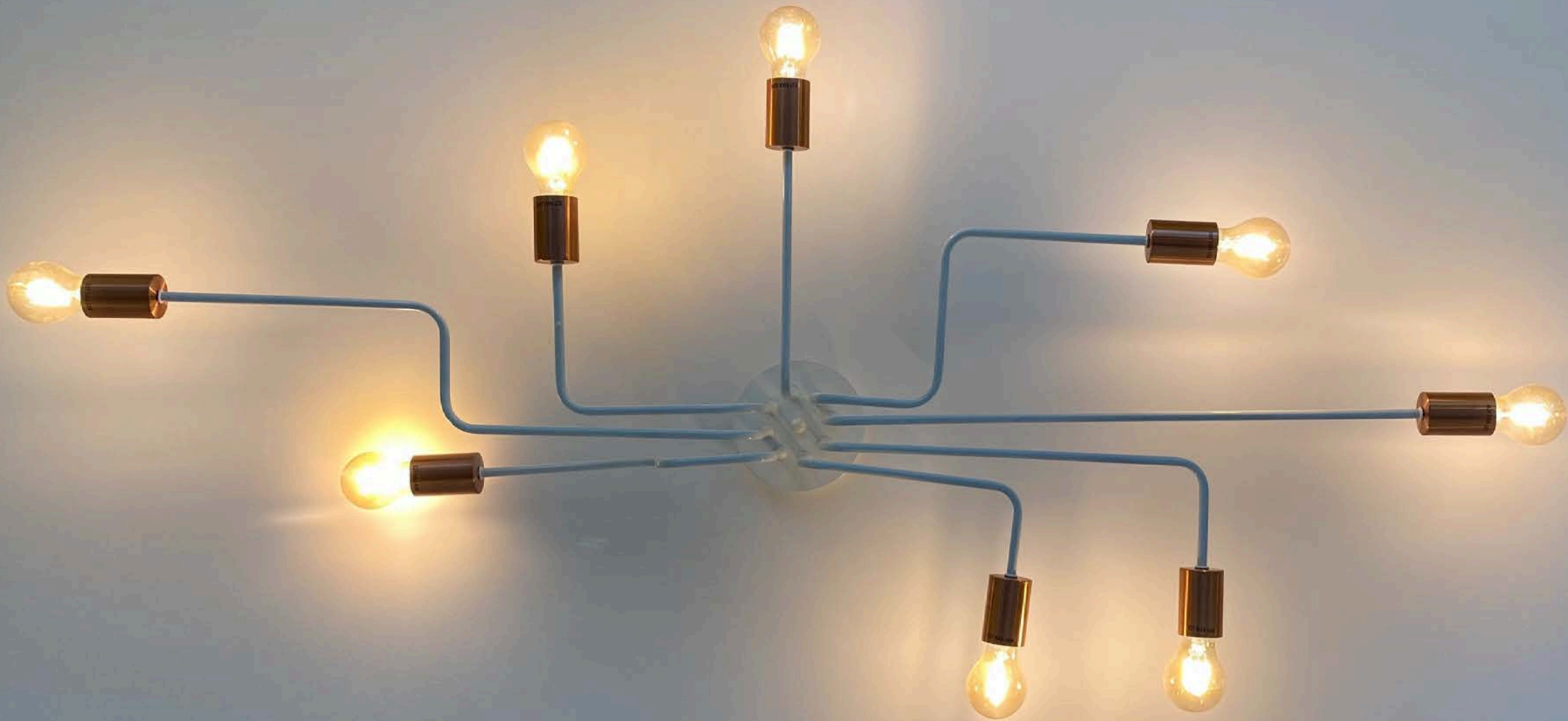


Volunteers: Who Needs 'Em?

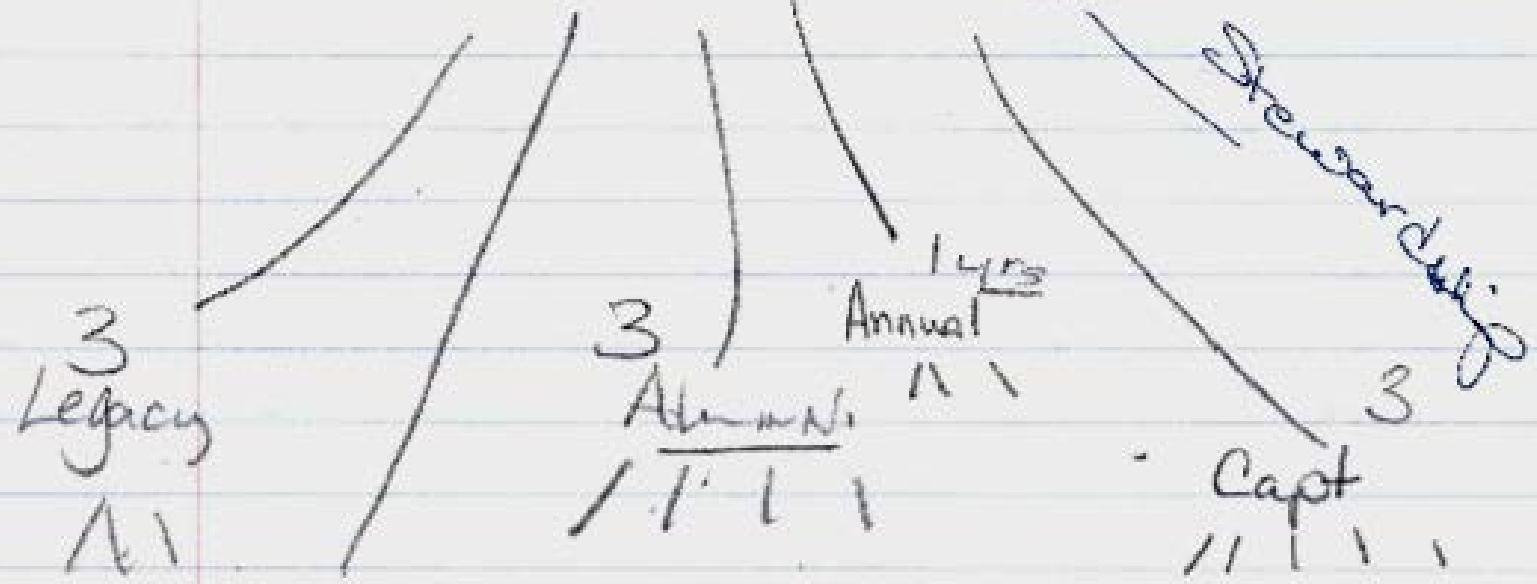


What if the
resources that
your organization
needs
are right at your
fingertips?



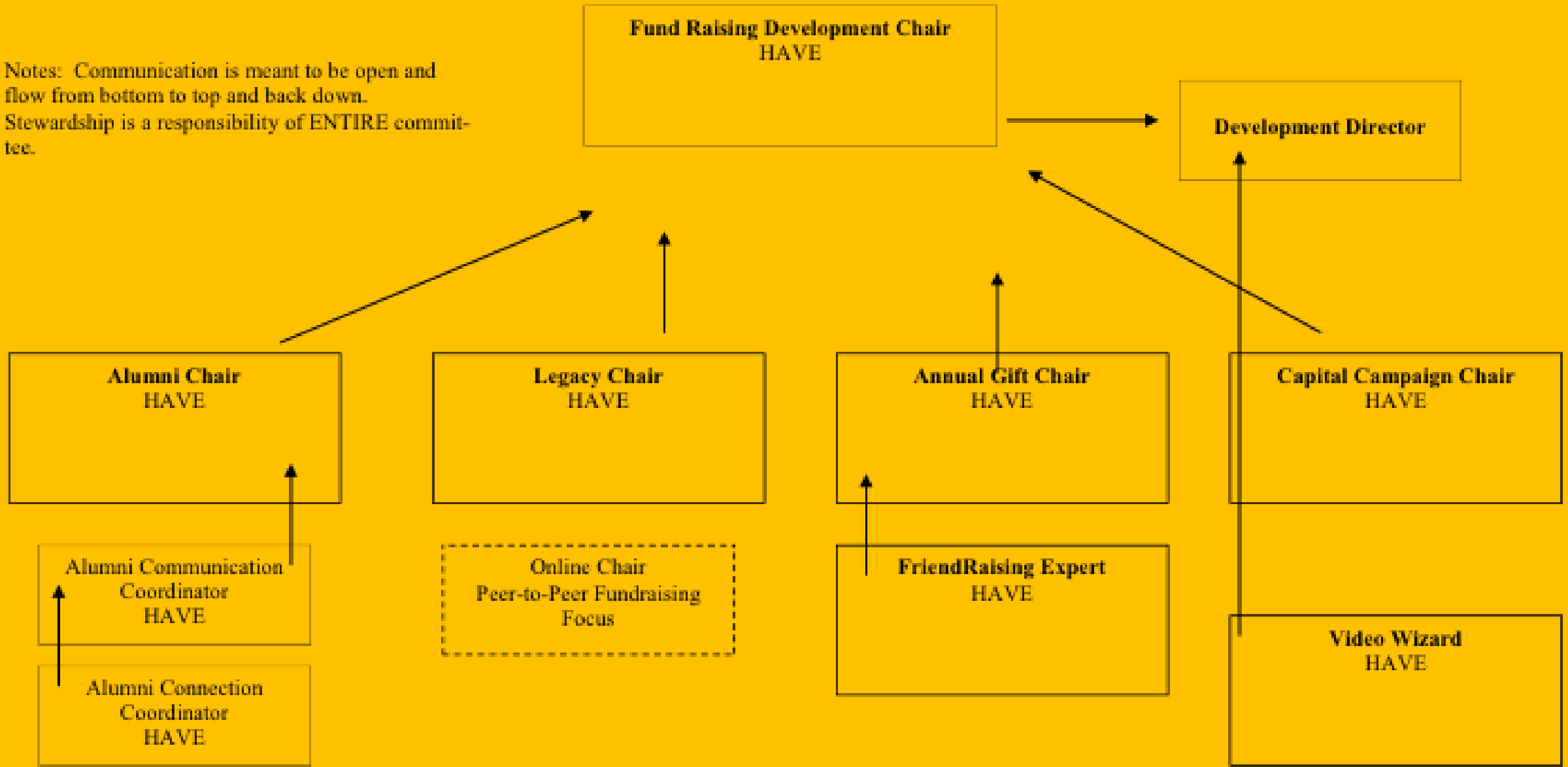


Allen Chair Development

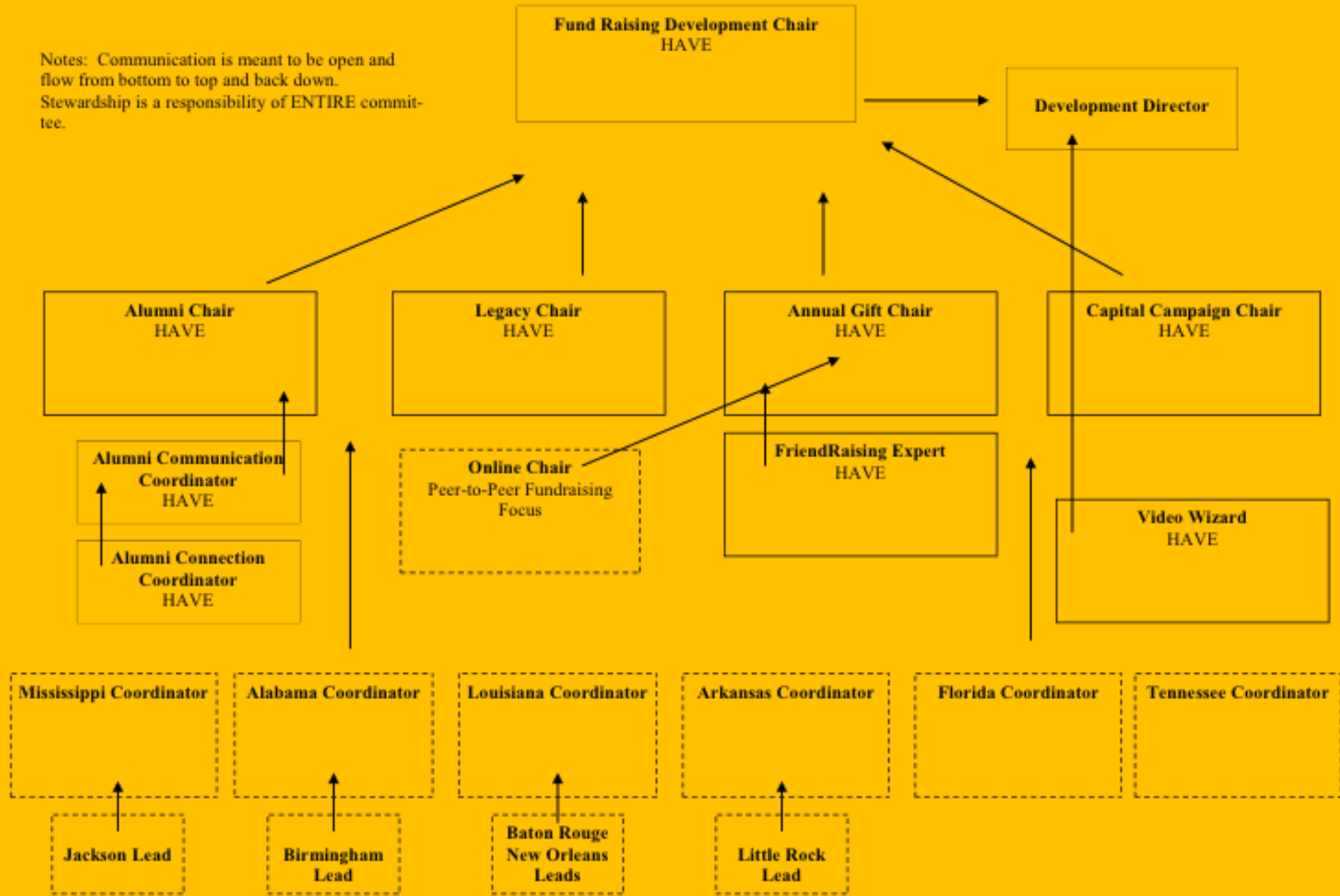


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Notes: Communication is meant to be open and flow from bottom to top and back down.
Stewardship is a responsibility of ENTIRE committee.



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Henry S. Jacobs Camp Development Committee

Jacobs Camp is embarking on a major Development Committee restructure. You have the opportunity to impact lives of Jewish children from the Deep South by taking a leadership role on the Development Committee. Currently, Jacobs is reaching out to Alumni all over the country, wrapping up a capital campaign, focusing matching grants, and expanding Legacy giving. There is great opportunity to begin a Scholarship Endowment and Stewardship program to strengthen Jacobs' future. Will you be a member of this important, amazing committee?

Time commitment:

- 1-2 hours per month for meetings via teleconference or webinar
- 4-6 hours per month for phone calls/personal meetings to prospective donors
- 1 Face-to-Face meeting per year at Jacobs Camp

Over all expectations:

- Have an open, transparent style of communication with each other as well as the Development Director of Jacobs.
- Provide timely and clear input, direction and approval to Development Director for overall fundraising activities
- Understand the fundraising process
- Take time to ready background information and go through training to prepare for the role as a volunteer fundraiser
- Provide timely responses to communication and request
- Identify prospective donors from your community
- Make your own significant financial gift through Capital Campaign and Legacy Society
- If willing, become a solicitor of gifts
- Follow through on assignments as expediently as possible and check in with results
- Operate as a team and celebrate each other's successes
- Respect confidentiality
- Raise philanthropy and donor stewardship to new levels of importance and integrity for Jacobs Camp

You will be provided training and support from Jacobs' Development Director and the Grinspoon Institute for Jewish Philanthropy. Depending on your role on the committee you will be invited to the Grinspoon Conference, Jewish Leaders Assembly and NAC Conference.

DEVELOPMENT CHAIR

The position of Development Chair is new to Henry S. Jacobs Camp. As the Development Chair, you and your committee are responsible for fundraising development of Jacobs Camp, including recruiting and training new development committee members, goal setting, and identifying future opportunities for growth.

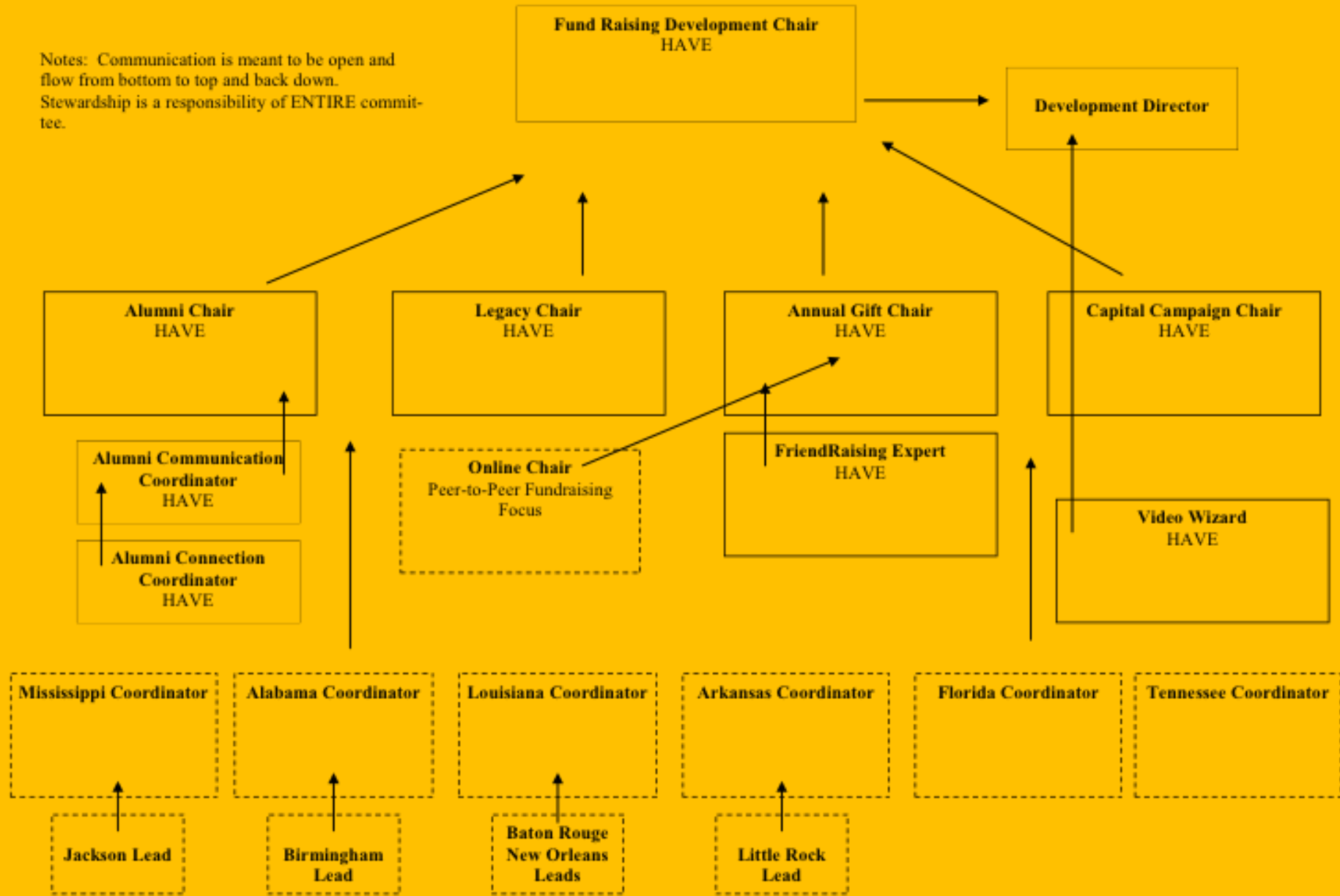
Roles and Responsibilities of a Fundraising Development Chair

- Be well versed in the mission of Henry S. Jacobs Camp
- Work with the Development Director of Jacobs Camp to help create a development time line and plans
- Support Capital Campaign Chair, Annual Chair, Legacy Gift Chair, and Alumni Chair
- Support State Coordinator/Community Leads
- Work with Committee to set goals and identify future opportunities and targets
- Work with Development Committee for proper training on tools for effective fundraising
- Help recruit committee members for Development Committee
- Lead and attend monthly teleconferences and/or webinars and one face-to-face meeting
- Report all fundraising efforts and leads to Development Director
- Make a three-year time commitment
- Promote Jacobs in your community and other communities in the region
- Send thank you notes/make calls to high priority donors (HPD)
- Attend Grinspoon Conferences

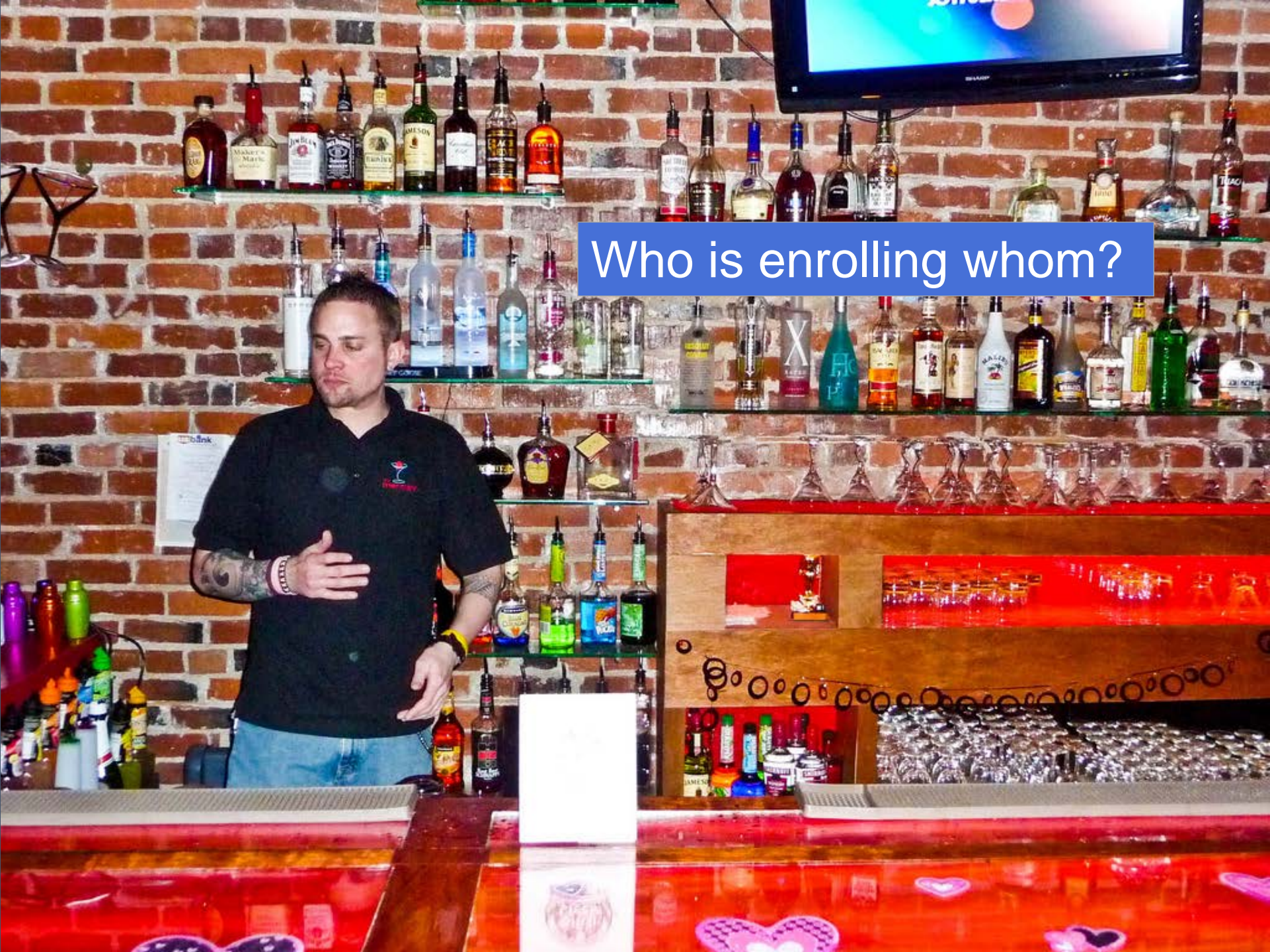
Successful Character Traits of a Development Chair

- Love of Jacobs Camp
- Strong attention to detail, being organized, ability to make and meet deadlines
- Positive attitude
- Ability to motivate others to support Jacobs Camp

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Who is enrolling whom?

What is Enrollment?

Moved

Inspired

Asked

Feel Free to Choose Yes,
No, or Counter-Offer



Moved

You are in touch with what moves you about camp and you get them to share what moves them.

Inspired

They become aware of being able to somehow make a difference. How? By YOU helping them find a way that resonates for them to participate in your mutual shared future. *Think Abundance!* (Don't ask them for something they don't have in abundance!)

Asked

Based on what you know about them, you invite them to be a specific part of it.

They feel free to choose yes, no or make another offer.

REFLECTION TIME: 3 minutes

1. Who do you know that you could have an enrollment conversation about participating in your development efforts?
2. What do you think they have in abundance? Are you sure? What questions would you ask to get in touch with their favorite ways to volunteer, spend their time, and help camp?
3. What are their favorite aspects of camp?



Breakout – Paired Share

What is one thing that you have taken away that you will do?

Who could you ‘enroll’?

In what??





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