

### Basic Training Bloomington, Illinois

July 19, 2011

Donna Ann Harris, Heritage Consulting Inc.



ILLINOIS  
MAIN STREET

### Agenda

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- In general: roles of board & committees
- Raising the money
- Volunteer recruitment, development & partnership development
- Communications: internal & external
- How to run the committee
- Work planning
- Top Ten Tips
- Q & A

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### The Main Street Organization in General

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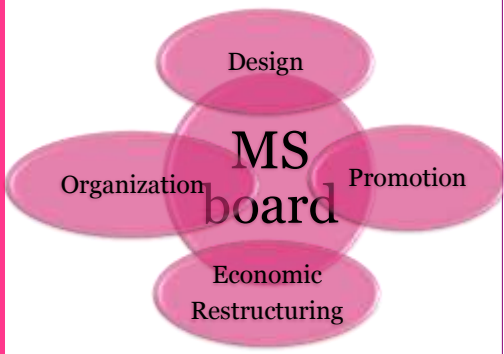
Four committees

One paid manager, full or part time depending on town population

Board of directors

Non profit corporation

Public/private partnership with city

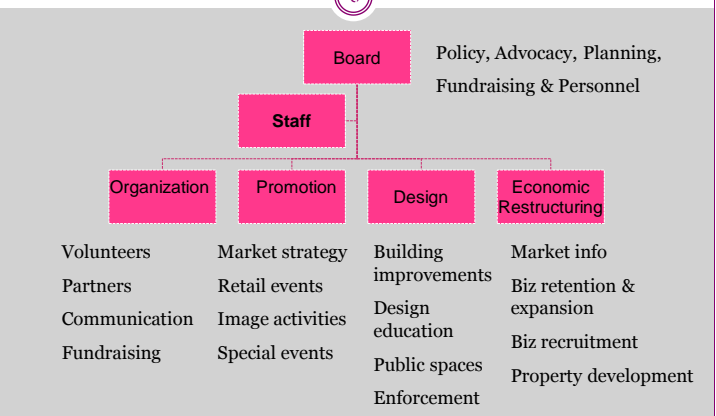


How is Main Street organized locally?

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### Typical Main Street Organizational Chart

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### What does the Board of Directors do?

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- Funding and financial management
- Advocacy
- Committee oversight
- Evaluation of program
- Personnel management
- Policy
- Planning
- Adheres to Mission and Vision



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### Why do we have committees?

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- Manager cannot do it all
- Allows many people to be involved
- Variety of skills
- Local residents plan the downtown's future
- Many interest groups involved
- Lots of volunteers needed

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### What do the committees do?

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- Take charge of specific tasks they feel are needed to help downtown
- Develop annual work plan
- Develop annual budget from work plan
- Work plan reviewed by board
- Budget and work plan adopted by board



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### More about committees

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- Volunteers allowed to spend money in adopted budget without further approval
- Board responsible for fundraising
- Manager does not raise money for their salary

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### Why do we have ONE staff member?

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- Empowers the board to own the work
- Creates many opportunities for citizens to be engaged
- Permits volunteers to take action to complete projects
- Involves many stakeholders



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### Hundreds of volunteers!

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- Someone has to know everything going on
- Someone has to attend all the committee meetings
- Someone has to be the spokesperson
- Someone has to write and manage the grants
- Someone has to coordinate volunteers

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### Organization Committee

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- To develop and sustain a well managed volunteer-driven organization
- The most important committee
  - Money
  - People
  - Communication

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**Organization Committee objectives**



1. Assist the board with fundraising
  1. Annual gifts
  2. Signature fundraising event(s)
2. Recruit, retain and recognize volunteers
  1. Develop partnerships
  2. Invite volunteers to serve
3. Communications
  1. Present the program to the public
  2. Communicate internally

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## Assist the Board with Fundraising

### YOU HAVE TO ASK!

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Does not do all the fundraising but helps the board to do its job

Usually organizes annual gifts solicitation process

Often does a specific fundraising event(s)




Organization Committee assists the board with fundraising strategies

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**Who raises funds for Main Street?**



- The Board—is ultimately responsible for a well funded organization
- Committees—Board delegates fundraising to committees, committees raise money for projects
- Committee members—implement fundraising activities
- Staff—writes and manages grants; assists everyone else
- Everyone!

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Board develops the annual budget  
 Makes individual donations  
 Assures there is adequate money to operate  
 Monitors program finances monthly  
 Approves expenditures through work plan process  
 Develops a long term funding strategy




**Board's role in fundraising**

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Staff's role in fundraising

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- Support board and committees in their fund raising efforts
- Serves as PR ambassador
- Makes sure work plans are completed
- Assists with annual gift and fundraising materials
- Tracks contributions, recordkeeping
- DOES NOT DIRECTLY RAISE MONEY
  - Exception: grant writing and monitoring



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Prepares fundraising materials  
 Coordinates annual gifts campaign  
 Implements signature fundraising events  
 Other fundraising tasks as assigned by the board



**Organization Committee's role in fundraising**

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What do you need money for?

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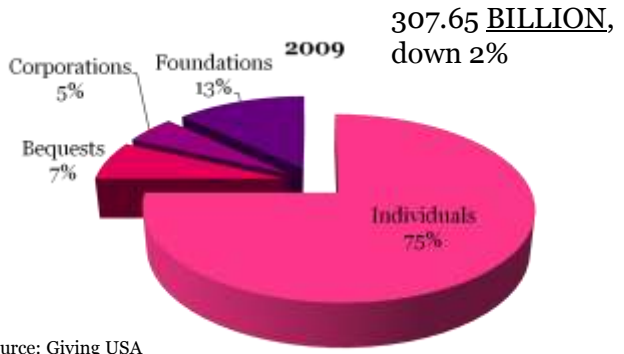
- Staff
- Overhead costs (rent, computers, website, newsletter, phone, etc)
- Committee costs
  - Some earned income from committees
- Small incentives for rehab (signs, awnings etc).



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### Where does charitable money come from?

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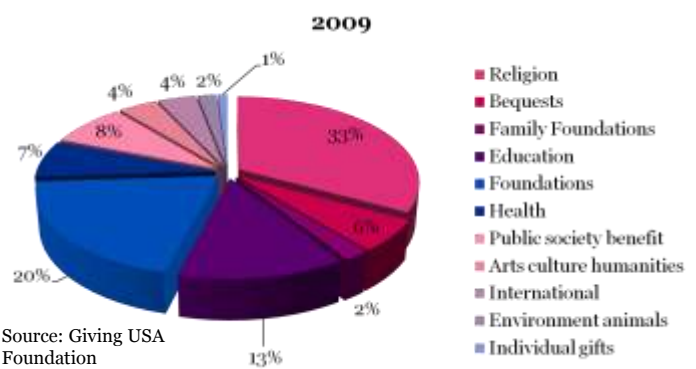


Source: Giving USA Foundation

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### What do Americans give to?

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Source: Giving USA Foundation

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### Who are your best prospects?

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- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_

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### Main Street budgets in general

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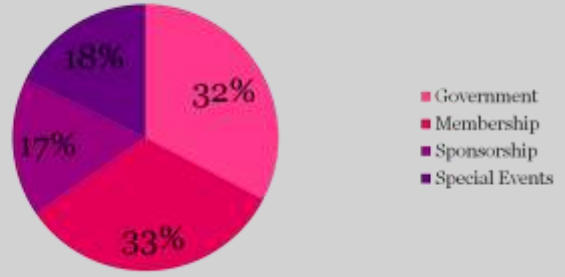
- Budgets start small, grow incrementally
- Are a function of local talent and persistence
- Sad Truth: Harder to raise money as time goes on, not easier
- More sources available as organization matures
- Need to start thinking about long-term sustainability after year 2

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### Start up Main Street budget

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#### Budget



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### Local Government

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- Local government should contribute
  - Direct appropriations
  - In kind services (i.e. public works, sanitation)
  - Maintenance of public areas
- A long term commitment of support to start, but it does not end there
- Longstanding financial commitment
- Government support should never stop
- High interest and involvement by elected and appointed officials in the work of the organization
- A true public/private partnership makes Main Street great

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Regular, predictable income every year

Political power = clout

Accurate, market-driven, evaluation of program and leadership

#### Annual gifts

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Annual unrestricted gifts by interested folks to support the organization in general

Multi-year pledges vs. annual dues

EVERYONE should be asked to give annual gifts; Not just merchants/property owners

Ask sponsors to give annual gifts too!

#### Annual gifts

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### Annual gifts campaign

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- Identify how much you need to raise
- Identify target sources
  - Merchants
  - Property owners
  - Residents
  - Others
- Develop materials for “pitch”
- Advance letters/other cultivation
- Personal contact
- Follow-up, answer questions
- Collection
- Thank you for gift
- Recognition of gift
- Solicit for other projects
- Start renewing 3 months before end of year

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### Signature fundraising events

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- Signature: identified with your organization only
- Grows over time
- But...they get stale
- Don’t make FR events weather dependent
- Gross vs. net—is the event worth your time? a year vs. several during the year



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### Signature fundraising events

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- Don’t make these events weather dependent
- All events have life cycles
- Gather a good committee and committee leadership
- Start small
- Add component parts over time



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### Signature fundraising events

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- Gross vs. net—is the event worth your time?
- Once a year vs. several events during the year
- Make the event fun, and something to do with your town.



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### Fundraising events: types and advice

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#### Types of FR events

- Dances
- Annual awards dinner
- Auctions
- Taste of ....events
- Progressive dinners
- Beer/wine tasting
- Casino nights
- Cocktail parties

#### Advice

- No chair, no event
- Watch expenses
- Train your team
- Appoint co chairs for all Fundraising events
- Make sure there is a logical successor for co-chairs

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### Focus on revenue YOU control

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- Not all of these funding sources are within the Organization's complete control
- YOU control the outcome of:
  - Annual gift solicitation
  - Signature fundraising event
  - Sponsorship
- Over time, make the segments YOU control at least 50% of your operating budget

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### 3 big secrets about fundraising

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- 1. PEOPLE GIVE MONEY TO PEOPLE (NOT CAUSES)**
- 2. YOU HAVE TO ACTUALLY ASK FOR THE MONEY**
- 3. IF YOU DON'T ASK, YOU WON'T GET**

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### Exercise

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- Divide into groups of 4 for a short exercise; Fundraising
- Three minute reports from groups
- Please print! I will collect and type up your group's answers

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### Stretch break

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### Volunteer recruitment, retention and recognition

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# YOU WILL NEED SCORES OF VOLUNTEERS

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### The Cycle of Managing Volunteers



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### Predictors for successful retention

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- Effective screening and matching of initial volunteers
- Volunteer recognition
- Training and professional development
- Recruitment by existing volunteers



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**How many volunteers do we need?**




- Main Street needs hundreds of volunteers each year
- Start-ups need 40 volunteers to get the ball rolling
- Building the volunteer and partner base is critical
- You will need MORE volunteers next year!

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**Attitude is everything**




- Board and the ED have to believe in the volunteer effort
- The experience must be positive for both
- MS never has enough volunteers

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**Getting ready to recruit**




- A real need and desire to work with volunteers?
- A clearly written work plan?
- A brief job description of what you want done?
  - Tasks listed
  - Honest appraisal of time it will take
  - All the answers to “what’s in it for me?”
- Willing to motivate new recruits
- Knowledge of how to find volunteers
- Training and recognition processes in place?

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**What do volunteers give?**


- Volunteers give time
- MS competes against leisure and family time
- How to make your program seem worthwhile to the volunteer



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### What do volunteers want?




- Meaningful work
- Job satisfaction
- Specific tasks to achieve
- “Give back to the community”
- Ownership, input and control by volunteer
- Part time work they can schedule to fit their needs
- To have fun

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### Volunteers today

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- Short term assignments
  - Create different types of volunteer opportunities
- Capturing young people
- Baby Boomers rock
- Use the web to recruit
- Make it the coolest thing to do in town
- Seek diversity
- Make it FUN




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### Volunteers today

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- People who give money are more likely to volunteer
- Baby Boomers need to be tapped




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### Volunteers today

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- 44% of Americans volunteer
- 89% donate money-- average gift is \$1620
- Volunteering is more common in towns than cities
- Youth who volunteer are more likely to volunteer as adults



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### Who volunteers today?

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- People with more education and money
- Slightly more women than men
- Volunteering peaks between ages 30 and 40
- People who volunteer for other organizations
- Joiners are more generous with their time and money



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### Who are your best prospects?

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- Who are your best volunteer prospects?
- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

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- Schools—clubs, teams, honors programs
- Community service organizations (Rotary)
- Religious Institutions
- Master Gardeners, Horticultural clubs
- Boy/Girl Scouts, other clubs
- Athletic teams/sports
- Senior Center
- others

#### What groups are best prospects?

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### What would motivate a group?

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- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

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### Quid pro quo

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- Asking groups to help makes sense
- Provide a “payoff” for their involvement
- Make the “payoff” part of your pitch
- Follow-up so the partner gets the benefit
- Have job descriptions for their work too
- Supervision is essential



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### What’s in it for me?

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- Achievement
- Affiliation
- Power
- Doing “good”
- Meeting new people
- Job experience
- What else?



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### Recruitment mechanics

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- Volunteer job descriptions
  - Flow from work plan
  - Describes the job to be done
- Volunteer coordinator for placement
- Volunteer orientation
- Volunteer training

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### A good volunteer job description has

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- Name of project
- Supervisor contact info, cell phone
- What the job is, factual and complete
- Time line and deadlines
- How to get reimbursed



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### Volunteer job description

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- Who the volunteer works with on project
- Whom to contact if there are problems
- Reporting relationships
- Where/how this job fits in overall scheme of committee & organization



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### Volunteer job descriptions

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The screenshot shows a search results page for 'Laramie Main Street Program jobs'. It lists several volunteer roles including 'Job Position', 'Get The Help You Need', 'Laramie Jobs', 'Organization Committee Member', and 'Design Committee Member'. Each listing includes a brief description of the role and a link to the organization's website.

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### Where to post job descriptions

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The screenshot shows a search engine interface with a search bar at the top and a list of search results below. The results include various links and snippets of text, likely representing different websites where job descriptions could be posted.

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### Other ideas: places to recruit

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This slide contains five red bullet points, each followed by a horizontal line, intended for listing various places or methods to recruit volunteers.

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### Volunteer recruitment

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- Types of recruitment
  - Wholesale
  - Retail
- Methods of recruitment
  - Targeted
  - Warm bodies
  - Concentric circles



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### Volunteer matching

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- Matching people to volunteer jobs
- Giving the volunteer real work to do
- Understanding what is asked, how much time it will take and the outcomes
- Orientation packets
- Put people to work right away
- Make it FUN



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### Volunteer matching

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- What to ask?
- Four point preference
- How much time they have
- Their goals in volunteering
- Prior satisfactory volunteer experience
- Work situations that are troubling
- Preferred working style i.e. group/alone
- Preferred supervision

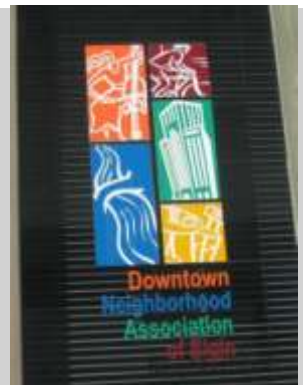


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### Volunteer supervision

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- Following up on volunteer assignments
- Making sure the volunteer/partner understands their assignment
- Providing encouragement, advice and deadlines
- Role of event or committee chair
- Avoiding disaffected volunteers



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### Volunteer retention

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- Keep the volunteers you have
- Harder to recruit new!
- Provide training
- Provide a job description
- Encourage volunteer rotation and new assignments for “stars”
- Move “stars” up the ladder to greater responsibility

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### How much time can you ask for?

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- How much time can you expect from a volunteer each month?
- **AVOID** Burn out
- Reaching a volunteer to a new assignment
  - Good idea for stars
  - Good idea for less than stellar performers
- Volunteers can outgrow their job
- Give them a rest!

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### Volunteer recognition: ways to thank

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- Personal praise
- Thank you card/note
- Certificates
- Ask advice/include in meetings
- Newspaper ads to thank
- Newsletter articles to thank
- Awards program
- Service pins
- Letters of recommendation
- Letters to their work boss



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### A great volunteer experience

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- Clearly defined tasks and timeline
- Provide appropriate training
- Orient to organization
- Use time well
- Make it fun
- Give additional responsibilities to star performers
- Thank, praise, thank, praise
- Recognize appropriately
- Let them REST!

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### Volunteer recognition

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Three times, 3 ways	Methods
<ul style="list-style-type: none"> <li>• In person</li> <li>• In writing</li> <li>• In front of their peers</li> </ul>	<ul style="list-style-type: none"> <li>• Service pins</li> <li>• Volunteer awards</li> <li>• Appreciation events</li> <li>• Plaques</li> <li>• Other ideas?</li> </ul>

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### Volunteer Recognition

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**Volunteer Recognition**  
An essential part of the volunteer experience


- Rewarding and recognizing volunteer
- Why? Decreases turnover
- Provides info to others on the person's commitment to the community
- Should be tailored to the person's personality, and to the job done

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### Volunteer data base

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- The volunteer data base
- Committee based vs. organization based lists
- Piggybacking people in the data base for other projects
- Avoid "my" volunteers



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### Exercise

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- Divide into groups of 4 for a short exercise; Recruitment
- Three minute reports from groups
- Please print! I will collect and type up your group's answers

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### Ways to promote the commercial district

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- Tag lines
- Banners
- Shopping bags
- Ads (coop, others)
- Marketing
- Branding
- Business directory/maps
- Promotional events
- Press releases
- Media coverage
- Calendar listings

*Implemented by the Promotion Committee*

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### Stretch break

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### Communication and PR

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**INTERNAL &  
EXTERNAL**

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### Ways to promote the organization

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- Newsletters
- Web site
- Blog
- Social networking
- Media releases
- Media coverage for organization
- Visual identity
- Annual gifts
- Annual report
- General brochures

*Implemented by the Organization Committee*

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### Communication: external

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- Sells the work of the group, not the commercial district
- Does not promote the district—Promotion committee does that
- Typical activities
  - Newsletter—print and email versions, e-blasts
  - Web site
  - Media attention/PR
  - Speakers bureau
  - Annual reports

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**Web site**  
 An essential tool to communicate both internally and externally



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### Newsletters

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### Media lists and regular press releases

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- Newspapers
- TV
- Radio
- Bloggers



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### General brochures

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### Social Networking Tools

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- Facebook
- Flickr and other photo sharing sites
- Twitter
- Blogs



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An effective way to bring the local Main Street message to many potential partners

- Rotary
- Schools
- Churches
- Chamber
- Eco Devo Groups
- Preservationists



### Speakers Bureau

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### Communication: internal

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- Communication within the organization itself
  - Web site
  - Listservs
  - E-blasts
  - Newsletter
  - Orientation for volunteers
  - Member activities



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### Stretch break

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## Organization Committee Work Plans

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### HOW THE COMMITTEE ACTUALLY WORKS THINGS YOU WILL DO THIS YEAR

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### Likely first year projects: Money

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- Assist the board with fundraising
- Strategies
  - Develop an annual gift database
  - Design the annual gift forms
  - Solicit for annual gifts
  - Develop a sponsorship package
  - Organize a signature fundraising event
  - Approach potential donors one on one



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### Likely first year projects: Volunteers

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- Recruiting, training and recognizing volunteers
  - Volunteer appreciation event
  - Volunteer orientation
  - Volunteer database
  - Volunteer training programs
  - Volunteer job descriptions
  - Targeted volunteer recruitment effort
  - Identifying potential partners for volunteer recruitment

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**Likely first year projects: Communicate**



- **Communication: Internal & external**
  - Start the Web site
  - Develop your media list
  - Design and publish a quarterly Newsletter
  - E-blast or monthly newsletter e-blast
  - Distribute flyers about the organization at events
  - Posters about organizational activities on kiosks
  - Write a monthly Newspaper column
  - Speakers bureau

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**Likely suspects for the Org Committee**

- Merchants
- Property owners
- Residents
- Civic group leaders
- Reporters/media reps
- Volunteer specialists
- Accountants




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**Who should be on the Org committee?**

- Focus on skills
  - Writers (newsletter, news releases, flyers)
  - “People” people (volunteer recruitment)
  - Good with databases (volunteers, annual gift)
  - Public speakers (training, speakers bureau)




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**Other candidates**

- Good organizers (developing systems)
- Knows everyone (volunteer recruitment)
- Throws a good party (volunteer recognition)



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### How do we recruit for this committee?

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- Identify your work plan projects for the first year
- Recruit specifically for skills needed
- ASK the person directly to help
- Show them the work plan, show them the commercial district
- Orient to the organization and volunteer job
- Invite to a meeting
- Be realistic about how much time the task will take



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### What do individual committee members do?

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- Take on specific tasks
- Attend training offered
- Learn about MS
- Participate in meetings
- Make sure your part of work is done on schedule
- Work with others
- Recruit others to help
- Represent the organization positively in public



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### Role of the chair

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- Recruits members, orients, supervises and thanks volunteers
- Runs the meeting, does agenda, takes minutes
- Organizes the work, schedules tasks, makes sure volunteers are working
- Forges consensus



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### Additional role of the chair

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- Represents the committee, brings info back from board to committee
- Encourages everyone to attend trainings
- Works with the staff to solve problems
- On top of paperwork: contracts, invoices, volunteer hours, reinvest stats
- Reimbursements!



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### Work Plan Elements

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- Goal—One overarching goal
- Objectives—How we reach our goal
- Projects—Specific projects to help implement our goals
- Tasks—Actions to move the project forward
- Timetable—When the project starts/stops
- Responsible party—Specific names, not staff or committee
- Success measures—How will we know we succeeded?



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- Under promise and over deliver
- Start small
- Build on successes
  - Focus on quality not quantity
- Do several small things very well
- Thank your volunteers, three times three ways



### Manage expectations

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### Review

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- What does the Organization committee do?
- Money
- People
- Communications
- Who should be on the committee?
- Likely first year projects
- Work plan approval process



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### Top Ten Tips

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- 10. Organization committee promotes the w\_\_\_\_\_ organization
- 9. Orient the volunteer to their job & the o\_\_\_\_\_
- 8. Tell volunteers how to get r\_\_\_\_\_
- 7. Recruit volunteers w\_\_\_\_\_ and retail
- 6. Thank people three times, t\_\_\_\_\_ ways

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### Top Ten Tips

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- 5. Focus on revenue that y\_\_ control
- 4. Ask e\_\_\_\_\_ to give annual gifts
- 3. The Chair takes m\_\_\_\_\_
- 2. Focus on q\_\_\_\_\_, not q\_\_\_\_\_
- 1. People give money to p\_\_\_\_\_

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### Questions?

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### Download helpful stuff!

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