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Professional Program in Fundraising and Volunteer Management **SOC WEL 1009-002** (3.0 CEUs)

Instructors:

Dustianne North, Ph.D., M.S.W. (Lead Instructor)
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Program Description

This Professional Program in Fundraising and Volunteer Management grows out of recognition that the future success of the nonprofit sector is directly related to its capacity to mobilize both financial and human resources. It is designed as an affordable training opportunity for those interested in increasing their expertise in raising funds, creatively managing human resources and community support, recruiting and retaining volunteers and board members, fundraising trends, and grant writing skills. It provides the knowledge and skills needed to increase and diversify funding, to build a 'case statement' and other materials for generating support, and to manage donor relationships. Participants will also learn about the stages of volunteer management—from recruitment, skill assessment, training, and supervision to retention and evaluation. Program participants are staff and managers in the nonprofit human services sector. Participants may be entering the development field or wanting to update their skills. Small and medium-sized nonprofits, as well as any nonprofit with new staff in need of training, benefit most from participation in this program.

Participants will gain:

- Community outreach and mobilization strategies (marketing, communications, and planning and strategy development) to support fundraising and volunteer engagement
- An understanding of the various types of fundraising and current philanthropic trends, and innovative fundraising strategies
- Multiple fundraising skills: grant writing, event planning, cultivating sustainable relationships with donors
- Knowledge of how to utilize community talent via volunteerism, to support all aspects of organization (direct client service to board leadership)
- An in-depth understanding of how to construct and manage a thriving, effective, and well-supported volunteer program
- A concrete product, developed by each participant during the course, that improves or expands fundraising and/or volunteerism in their sponsoring organization
- Support from course instructors, agency directors, and a personally-selected advisor

The Professional Program in Fundraising and Volunteer Management

Course Requirements/Assignments

Pre-Requisite: Nonprofit Organizational Support

In order for participants and organizations to get the most from this course, we require organizational buy-in and some preparatory work on the part of participants before class session #1. Participants who are employed at a nonprofit organization will have enrollment priority; individuals who want to learn about fundraising but are not working for a nonprofit may also “adopt” a nonprofit that will benefit from their work; the same organizational buy-in is required for these participants as for those employed.

Participants must submit, along with their application to enroll, a letter of intent from the organization sponsoring them, signed by a director. This helps ensure that participants have access to organizational information needed to complete class activities and final projects, and that the director meets with the participant at least 3 times throughout the course (may be incorporated into regular supervisory meetings) to support learning and the participant’s final project. Directors are also asked to commit to allowing participants the availability to attend all 4-class sessions, and to spend some time at work to make progress on their project and other course assignments.

Participant Projects

To promote hands-on learning, and to ensure that organizations benefit from staff participation in meaningful ways, participants will develop a coherent product of value to their organization in terms of improvement or expansion of fundraising and/or volunteer activities. The assessment and assembly of materials done prior to the course will set the stage for this, and early in the course participants will work with their directors to identify a needed product for development. Projects are expected to involve a minimum of 3-5 pages of materials; many projects will be far more extensive. Examples of fundraising-oriented projects include the creation of a complete set of marketing materials for a new fundraising campaign, or the development or expansion of an overall fundraising strategic plan. Volunteer management projects might focus on developing or expanding a coherent menu of volunteer opportunities or strengthening a volunteer intake and/or supervision system, for examples.

Course content and activities will support progress on these projects and allow for participants to gain feedback from instructors and other participants. Participants are also expected to make progress on their projects between course sessions, with support from the directors of their organization.

Each participant will make a presentation of their product on the last day of the course, and products developed may be voluntarily submitted to course instructors (if feedback is desired) before they are provided to organizations and implemented.

Pre-Course Assignments: Organizational Assessments and Binders

Once enrolled, and prior to class session #1, participants will *complete an Organizational Assessment*, which directors may need to help to complete.

Completion of this brief questionnaire will help participants gain a clear picture of the existing status of their fundraising and volunteer activities, including information about the organization's Board of Directors, development department and current funders, overall program, evaluation, volunteer programs, and overall organizational development.

Using guidelines provided, participants are also asked to *assemble a binder* containing organizational materials such as mission and vision statements, current budget, organizational chart, current case statements, sample grants, marketing materials, descriptions of existing volunteer programs, and summarized strategic plan.

Assessment questionnaires and instructions for binders are provided prior to enrollment in the course. Participants are asked to bring their completed assessments and assembled binders to each class session, as they will be used extensively during class activities and when executing their projects.

Learning between Sessions

Activities are provided for participants to complete on their own between sessions, in order to reinforce and maximize learning, as well as to improve organizational materials throughout the course. These assignments are not generally submitted to instructors, but participants may voluntarily request feedback if desired. A list of recommended readings is also provided but not required.

Advisors

Participants are encouraged to identify and gain support from an advisor who has expertise and experience in grantmaking, fundraising and/or volunteer management, who will agree to meet with participants at least four times and support their learning in the course. The course instructor will assist participants who encounter difficulty in securing an advisor.

Course Outlines (Days 1-4)

Day 1: Overview of Course, Introductory Concepts, and Program Assessment **(Friday, September 22)**

Welcome and Introduction

Instructor: Dustianne North

Course Overview

Instructor and Participant Introductions

Review Syllabus

Introduction to Fundraising

Instructor: TBA

Broad Strategies

Types of Fundraising

The Need to Build a Case

Elevator Pitch

Introduction to Volunteer Management

Instructor: Ginni Ring

Types of Volunteerism and the Value of Volunteers

Roadmap for Building a Volunteer Program

Foundational Concepts and Assessing Your Organization

Instructor: Dustianne North

Community Engagement in your Program (Mobilizing Material and Human Resources)

Board Development and Management

Embedding your Organization in the Community (establishing a presence and identity)

Assessing your Readiness and Identifying Needs

Continued Learning

Activities for continued learning before session 2, will be provided in class.

Progress on Final Project before Day 2

- 1) Meet with your Director: Discuss with your organization's Executive Director, CEO, or another Director your organization's strengths and weaknesses based on the assessment checklist you worked with in class. Work with them to select a product to develop for the organization as your final project for the course.
- 2) Define your final project:
 - Complete and submit your Final Project Assignment Form.
 - Create a draft outline of the product you will develop: What will be its overall structure, and what documents and materials do you think will be included?
- 3) Meet with your Advisor to gain guidance on your developing project

Day 2: Core Skills and Concepts

(Friday, October 13)

Community Outreach and Volunteer Management Principles

Instructor: Alissa May

Community Outreach

Volunteer and Board Recruitment

Positioning and Marketing for Volunteers

Volunteer Management Principles

Instructor: Dustianne North

Developing a Coherent Volunteer Intake and Support Process

Prospecting, Cultivating, Soliciting and Thanking Donors

Instructor: Christine Paquette

General Planning

Prospecting and Cultivating

Soliciting Donors (Non-Major)

Thanking Donors

Continued Learning

Activities for continued learning before session 3, will be provided in class.

Progress on Final Project Before Day 3

1. Develop a draft of any plans, timelines, structures, and main content for your product.
2. Begin to develop supporting materials that add detail to your product
3. Meet with your Advisor to gain guidance on your developing project

Day 3: Advanced Fundraising Skills

(Friday, November 3)

Grant writing and Demonstrating Impact

Instructor: tbd

Introduction to Grant Writing

Foundation Grants

Government Grants

Research Grants and Demonstration Projects

Documenting Impact of Services and the Importance for Sustainability

Basic program evaluation concepts and skills

What funders want to see

Documenting Volunteer Activities

Lunch Discussion (Panel): Feeling Comfortable and Knowing your Role

Facilitator: Janelle Cavanagh

Role of the Board and Executive Director when fundraising

How to feel comfortable communicating with wealthy donors

Strengthening internal relationships for Executive Team decision-making and support

Current Fundraising Trends: Leveraging Technology to Foster Better Relationships

Instructor: tbd

Fostering good relationships with your donors through better engagement

Coordinating Multi-channel fundraising

Crowd funding

Cause Marketing and Corporate Social Responsibility

Continued Learning

Activities for continued learning before session 4, will be provided in class.

Progress on Final Project Before Day 4

- 1) *Refine your product and supporting materials:* Refine your plans, timelines, structures, and main content for your product, as well as all supporting materials.
- 2) *Prepare a presentation:* Develop a 10-minute PowerPoint presentation illustrating the product you have developed for your organization, which you will present to your classmates and instructors during Session #4.
- 3) Meet with your Advisor to gain guidance on your developing project

Day 4: Pulling it all Together: Communication, Ethics, and Crossover Issues (Friday, December 1)

Securing Major Donor Support

Instructor: Janelle Cavanagh

Who is a major donor for your organizations?

Who solicits major donors?

How to conduct research

Securing and meeting goals for a first meeting with a potential donor

How to keep/develop the relationship

Making the ask

Promoting Ethics and Accountability

Instructors: Janelle Cavanagh, Dustianne North, and Ginni Ring

Ethics in Fundraising

Setting the tone and enforcing volunteer policies

Reasonable expectations for volunteers, board members, and donors

Tying it all Together: Lessons Learned and Crossover Issues

Instructor: Dustianne North

Panel Discussion: Foundation program officers discuss how to best attract foundation support.

Participant Presentations

Ten-minute PowerPoint presentations of final projects, with feedback and Q&A

Continued Learning

Activities for continued learning for the future will be provided in class.

Certificate Ceremony and Reception

All participants, their directors, and other guests are invited to participate in a gathering (from 5 to 7 PM) to honor participants and present certificates of completion, as well as to reflect on positive results of the course and solidify connections made for the future.