

Volunteers & Leadership Councils

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Volunteers - are they worth your time?



Volunteers

- Who are they?
 - Parishioners or support community members
 - Students paying back scholarships
 - Local parents
 - Potential or existing BENEFACTORS
- ENGAGEMENT leads to INVESTMENT

Volunteers

- Capitalizing on volunteer opportunities
- Avoiding volunteer fatigue
 - Have a volunteer sign up ONLY for the opportunities for which somebody will actually follow up
 - Insist your staff at a minimum send an email thanking volunteers for signing up
 - Volunteer appreciation

Where do you utilize your most high value volunteers?

On your organizations' Leadership Council

Utilize other volunteer opportunities and committees to determine if a volunteer would be a good candidate for your Leadership Council

Leadership Council Purpose

- A Leadership Council is comprised of committed volunteers passionate about your ministry who are willing to work on high-level strategy and help network with prospective donors and partners
- They guide long term vision and goals and keep staff accountable to them
- They lend resources and talents to help fulfill your mission

Inviting your top benefactors, prospects and allies achieves:

- Credibility
- Fresh ideas
- Accountability
- Time with your best supporters
- Investment in your organization

Composing your Leadership Council

- People of great faith, affluence and influence who are passionate about your mission
- High level representatives from university and diocese
- Student representatives
- Diversity in backgrounds and skills
- The right Chair

Logistics

- Membership
- # of Meetings
- Terms
- Attendance

Sample Agenda

- Opening prayer
- Introduction of new members and/or visitors
- Approval of minutes
- Follow up on action items from last meeting
- Directors Report/Pulse of the Ministry
- Student presentation
- Development Report
- Finance Report
- Key decisions to be made
- Next steps
- Closing prayer

Avoiding meetings that could be done over email



"ALL THOSE IN FAVOR OF HAVING ANCHOVIES ON OUR PIZZA WILL SIGNIFY BY SAYING AYE."

Leadership Council Case Study



Petrus Development Conference
January 7-10, 2018 | San Antonio | Texas

PETRVS
DEVELOPMENT

W&M Leadership Council ca. 2015

- Same 10 members who had been on since 2004
 - All local community members - some big supporters, some not
 - Ex oficio seats for Pres. and VP of Student Leadership Board
- 9-10 meetings/year
- Same few discussion topics cycled through
 - Benefit Gala
 - Endowment
 - Relationship with Local Parish
- Drain on staff energy and resources with very little return

W&M Leadership Council ca. 2015

- Meeting Format (1 Hour):
 - Welcome and Opening Prayer – 5 mins.
 - Business (approve minutes from previous meeting) – 5 mins.
 - Finance Update – 10 mins.
 - Development Update – 10 mins.
 - Programming Update – 10 mins.
 - Open Discussion – 15 mins.
 - Final Business and Closing Prayer – 5 mins.

W&M Leadership Council ca. 2016

- Invited some new membership, but did not cycle anyone off
- Moved to Quarterly Council meetings
- Addition of two Committees, each of which also meets quarterly
 - Development
 - Finance
- Added expectation of annual giving
- Same basic meeting format
- Most helpful and motivated member still frustrated...
- Staff still generally frustrated with lack of added value from Council...

W&M Leadership Council ca. 2017

- Return to By-Laws; made some edits
 - Membership terms
 - Annual giving threshold of \$1,000/year
- Importance of WHO is around the table – targets set for new member diversity (esp. diversity of constituency)
 - Alumni
 - Parents
 - Faculty/Staff
 - Administration
 - Community/Parish
 - Diocesan Leadership

W&M Leadership Council ca. 2017

- Intentional focus on membership terms
 - Lengthened some terms to avoid too much turnover
 - Invited some members to renew
 - Did not invite some others to renew – positive, gratitude-filled approach
- Clear expectations laid out for new (and old!) members
 - Philanthropic giving to CCM (min. \$1,000/year) and willingness to assist Development Dir. in setting up meetings and making asks
 - 75% attendance at meetings (in person or teleconference)
 - Preparation for L.C. and subcommittee meetings through review of advance materials sent and preparation of notes and questions in advance of discussion
 - Membership on subcommittee
 - Sponsor, bring a table, or contribute a live-auction item to Benefit Gala

W&M Leadership Council ca. 2017

- New Quarterly Meeting Format:
 - Opening Prayer (2-3 mins)
 - Council / Membership Business (5-10 mins)
 - Updates on Old Business (5-10 mins)
 - Subcommittee Reports (3-5 mins each)
 - Student Testimony (5-10 mins)
 - Discussion Topic (45-60 mins)
 - Review of member action items from meeting (2-3 mins)
 - Closing Prayer (2-3 mins)
- Discussion Topic: Topic and preparatory info sent in advance

W&M Leadership Council ca. 2017

- Addition of Annual Retreat
 - $\frac{1}{2}$ Day (incl. Breakfast and Lunch)
 - Facilitated by someone other than staff
 - Purpose: clarifying vision and translating into short-medium-term goals
- Past year retreat format:
 - Prep: Staff research visits to three peer-istitutions outside of Diocese
 - Part 1: Information sharing from visits
 - Part 2: Discussion of trends and common threads
 - Part 3: Brainstorm and ranking exercise for next 12 month priorities
 - Post: Synthesize chosen goals into a concise working document

Maximizing your Council

- Involve them in your decisions, if not in making them, in giving advice before you proceed
- Keep them informed
- Use them to set long and short term goals for your ministry
- Place responsibility for assuring goals are met on the Council
- Have a healthy rotation of members

Utilize your Council's skills & resources

- They want their participation to make a difference
- Ask them to make connections to others
- Ask them to lend the marketing/IT/HR resources of their businesses if you need them
- Give them tasks like prospect qualification

Sample decisions for LC's

- Goal setting
 - How does your ministry define success
 - How can you measure that success
 - Annual goals
 - Long term goals
- Staffing
 - How are staff evaluated
 - Is supervision effective
 - Are responsibilities appropriately allocated
 - Is compensation adequate
- Programming
 - What standards do you set for programs such as each semester must have social, retreat, service, small group, on campus opportunities etc
 - Are resources appropriately allocated for programming
- Finance
 - How to utilize bequests
 - How to address budget surplus and shortfalls

Listen to your Council

- Invite them to suggest agenda items
- Survey them on satisfaction





Questions?

What is your experience?