

AVAP Conference Small Shop, Limited Resources, Big Expectations

Before the Session:

- Recruit a scribe to take notes that will be posted on the website
 - Hnouzong Her- cell 530-574-5539

At the Session:

Welcome to the **Small Shop, Limited Resources, Big Expectations** session; introduce yourself as the moderator of the session, providing your name and affiliation.

Ask someone to notify moderator when five minutes are left the session.

Outline the ground rules at the very beginning of the session

- Turn off cell phone noises.
- Remind audience that everyone is here to learn and that everyone has a valuable perspective to share.
- When asking questions: identify yourself and speak loud and clear.
- Keep comments to 1-2 minutes to allow everyone a chance to ask questions and or share information on the topic.
- Call on people with raised hands
- Begin with a brief overview of the topic (3-5 minutes) - best practices or an example of how things are in your shop.

Kay Glaser

WSU CVM Veterinary Development & Alumni Relations

- **WSU CVM-less with less- gave up non-fundraising**
 - Transfer tasks that don't make sense to stay
- **Utilize campus wide interns**
 - Utilize the interns, they are wiz bangs and doesn't cost anything
 - Very little training needed
- **Recruit others to be on our team, PSR, Techs, house officers, students**
 - Provide customer service training
 - Have them write thank you notes
 - Steal help where you can
 - Used interns for Communications & Public Relations

Pamela Erickson

UCD SVM Event Manager 60 events, 2 conferences; 10 off site; 20 over 100 people

- **UCD SVM Events- More for Less**
 - Get the most bang for your buck
 - Tight budget, do something for less that looks high-end
- **Relationships with private small shop vendors**
 - Build relationships, it will cost less, they will bend over backwards for you

- Able to negotiate pricing
 - They will buy things we want because they want to keep our business
 - **Purchase items that can be utilized for multiple events**
 - **Semi Catered Events- Train other departments**
- Open the discussion by inviting other people to share their experience or questions.
 - Communication
 - Repurpose the things that were previously written by the communications team for the School – repurpose for development
 - i.e. Communications Team puts out a magazine 2x a year and we repurpose the stories they featured for proposals, etc.
 - Utilize interns for writing, social media, and video making
 - Not an expensive program
 - Call Center
 - Provide a script for Alumni & Grateful Clients
 - Straight ask
 - Provide tours to the student callers
 - Follow up is done by the SVM development office if needed
 - Surveys
 - Help self-identify donors, client exit survey via email
 - Would you be interested in learning more about how private gifts impact the college?
 - If you get negative feedback, mark them not to get information
 - Try to identify clients who you think may have capacity, but may not know what philanthropy is
 - Outlier list: people who were seen before and are now being wealth screened, development officers have a script to call and get feedback (role: client relationships) – cold call
 - What do you do with the negative feedback: client relations handle the negative feedback
 - Educate faculty & staff about philanthropy and who to contact
 - If faculty do bring someone in, showcase them
 - Create an extended network
 - Train house officers as well, get great referrals
 - Provide development orientation to House Officers
 - Provide a training seminar
 - Bring a consultant in for some training (optional) – Impact You (Walt Edwards)
 - Took his training manual and built out 5 white board messages, i.e. if you hear this “I really appreciate the care you provided, how can I help?”
 - Video tape a short segment to the 5 messages, bring bigger impact, very inexpensive, reuse over and over
 - Be down in the hospital/clinic, engage everyone there, so they know who you are (have a presence)
 - Give feedback on success stories

- Provide orientation for the 4th years
- Go to the service meetings, discuss the 10-12 prospects that have been prospected and ask if they know who they are and if they can share information
- Salon Events – major impact with a small group of people
 - Focused event, one-on-one
- How do you deal with donor expectations with a limited budget
 - Flashy event vs low budget event
 - Return items when possible
 - Trouble engaging alumni even with an event
 - Get suites with cases of beer & wine and it'
 - Flowers from Trader Joes
- Alumni Receptions – what are you doing?
 - They want to party, they don't want college update
 - They don't want the dean to talk, but the dean wants to talk
 - Limit the dean to 5 minutes
 - If new dean, introduce the dean

Moderating Tips:

1. What do you think has changed in the past few years in small shops? What do you hope to change in the next few?
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2. What challenges have you overcome with Limited Resources? or Big Expectations?
 - a. What did you learn?
3. Share your greatest success being a small team.
What made it so successful?
4. What is the biggest challenge in this area right now?
 - a. How are you addressing it?
5. Do you have other responsibilities outside of just fund raising?
6. Is there any way to integrate areas within your fund raising program to be more efficient?
7. What is one easy or inexpensive thing you did or want to do at your college to impact this topic?
8. What **one** thing you would share with the group about what your college has done?
9. What haven't we covered yet that you see as important?
10. Is this topic we would like to address next year / in the future? Possibly with a presenter?

Concluding the Workshop:

- Move to the front of the room and signal the end of the session, such as, "And that concludes the session on [topic here]". Thank all participants for their attention.