

**LEADING  
EVER  
FORWARD**

**VOLUNTEER  
ENGAGEMENT**

**THOMAS J. FARRELL '88, '90W (MS)**

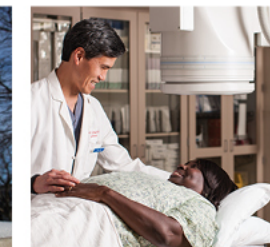
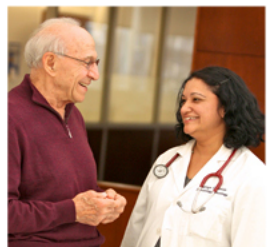
SENIOR VICE PRESIDENT FOR ADVANCEMENT

**JOHN LIPPINCOTT**

PRESIDENT EMERITUS, COUNCIL FOR ADVANCEMENT AND SUPPORT OF EDUCATION  
OF COUNSEL, MARTS & LUNDY

UNIVERSITY OF ROCHESTER

**VOLUNTEERS** *in*  
**PARTNERSHIP**

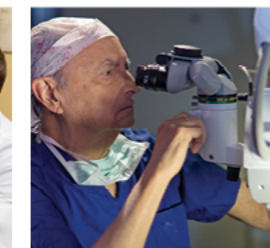
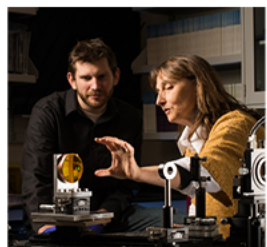
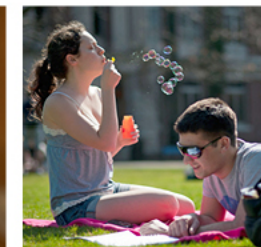


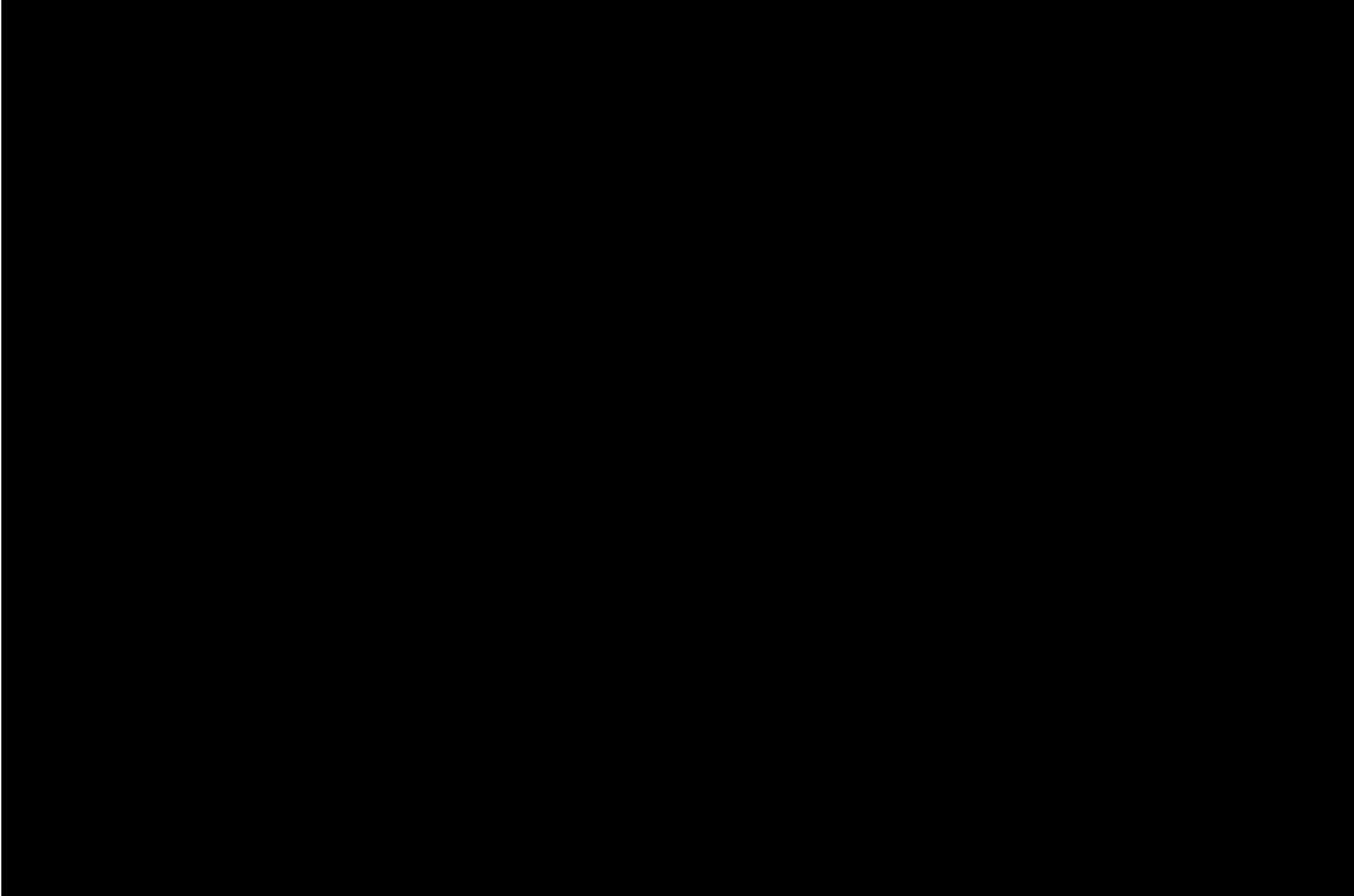
BUILDING ON  
Momentum

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The ROCHESTER  
MODEL

2021 Strategic Plan for University Advancement





- **SALIENT ISSUES:**
  - **Clarity of purpose and expectations**
  - **Intentionality of design and practice**
  - **Consistency vs. flexibility**
  - **Performance metrics and reports**
  - **Coordination and collaboration**
  - **Volunteer experience**

- **Clarity of purpose and expectations:**
  - **Group mission statement**
    - Strategic connection to school/unit
    - Periodic review
  - **Member job description** (“Go, Give, Help, Connect”)
    - Active participant (offer services, host events, attend mtgs.)
    - Donor and/or fundraiser (identify, engage, steward donors)
    - Advisor (serve as sounding board, technical expert)
    - Ambassador (broaden awareness and spheres of influence)

- **Intentionality of design and practice:**
  - **Culture of engagement**
  - **Member recruitment, retention, diversity**
  - **Onboarding and orientation**
  - **Substance and conduct of meetings**

- **Consistency vs. flexibility:**
  - **Shared best practices**
    - Periodic mission review
    - Member term definitions
    - Role of chair
    - Quality of volunteer experience
  - **Respect differences among unit cultures, group missions**

- **Performance metrics, reports and recognition:**
  - **Mission-specific metrics** (e.g., go, give, help, connect)
  - **Systematic evaluation** (group, individual)
  - **Periodic reporting** (within/among groups, to leadership)
  - **Recognition for strong performance** (group, individual)



- **Coordination and collaboration:**
  - **Interactions across volunteer groups**
  - **Joint projects**
  - **Connection to governing board**
  - **Centralized vs. decentralized services**
  - **Volunteer “clearinghouse”**

- **Volunteer experience:**
  - **Volunteer “conciierge”**
  - **Volunteer resources**
  - **Ongoing communication**
  - **Volunteer surveys** (including net promoter score)

## **- DISCUSSION QUESTIONS -**

- **REGARDING THE REVIEW IN GENERAL:**
  - **Of the issues that were described, which do you think are of greatest importance for strengthening the impact and experience of volunteers?**

## **- DISCUSSION QUESTIONS -**

- **REGARDING THE REVIEW IN GENERAL:**
  - **Are there issues that were not discussed that you want to be sure we address in the report?**

## **- DISCUSSION QUESTIONS -**

- **REGARDING THE REVIEW IN GENERAL:**
  - **Were there any red flags for you in what was described? Are there approaches to volunteer engagement that could do more harm than good?**

## **- DISCUSSION QUESTIONS -**

- **REGARDING CLARITY OF ROLES AND EXPECTATIONS:**
  - **Are you clear about the current expectations for you as a volunteer leader? Are you comfortable with those expectations, including those related to philanthropy?**

## **- DISCUSSION QUESTIONS -**

- **REGARDING INTENTIONALITY OF DESIGN AND PRACTICE:**
  - **Do you feel you have both the opportunities and the information to fulfill your volunteer leadership role?**  
**Do you have any suggestions regarding ongoing communication?**

## **- DISCUSSION QUESTIONS -**

- **REGARDING PERFORMANCE METRICS, REPORTS, RECOGNITION:**
  - **For your particular board or council, how do you (or would you) measure success?**



## **- DISCUSSION QUESTIONS -**

- **REGARDING COORDINATION AND COLLABORATION:**
  - **Beyond this conference, what connections should exist among the volunteer leadership groups and with the governing board?**

## **- DISCUSSION QUESTIONS -**

- **CLOSING THOUGHTS:**
  - **Share with us any other observations from your personal experience as a volunteer that could be helpful to us in formulating our recommendations (e.g., ways you could be better utilized).**



**VOLUNTEER  
ENGAGEMENT  
REVIEW**

**THANK YOU!**  
(...stay tuned)

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**VOLUNTEERS *in* PARTNERSHIP**