Partner Recruitment Manual

Invest. Engage. Advance.

A Message from SVPI

Every SVP is a community of engaged philanthropists working together to support effective nonprofits. The concept of community permeates all of our work, not least in the area of Partner recruitment. This manual takes the community aspects of recruitment—Partner referrals, shared educational opportunities, networking motivations, collective commitment, and more—and places them in the context of a *system* for implementing an ongoing annual recruitment plan.

The value of the SVP model has a particular resonance for the kind of individual who ultimately becomes a Partner. Recruitment, therefore, is not a "hard-sell" process, but rather one of sharing information, making connections and, ultimately, creating a space in which a prospect can make a meaningful decision.

This kind of personal, customized process can sometimes seem enigmatic and difficult to structure. That's where this manual comes in. We have provided you with a standardized approach to Partner recruitment that will help you streamline the process, while allowing for the inevitable personalization that every prospect will eventually require. The manual is founded in best practices from SVPs across North America and in the most current thinking around fundraising and philanthropic investment. We interviewed SVP staff and Partners to learn what's working, to identify creative recruitment activities, and to ground the process in the day-to-day realities you face in your work.

You will find in this manual a road map for creating and implementing a Partner Recruitment Plan. It is our hope that, as you proceed, you will share your successes and findings with other SVPs through the network intranet (SharePoint).

Thank you for all that your SVP does to support engaged philanthropists and effective nonprofits. By investing in excellent recruitment practices, you ensure continued good work in your own community.

Sincerely,

Bob Wright	Ruth Jones
SVPI Board President	SVPI Executive Director

September, 2007

Acknowledgments

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Table of Contents

An Introduction to the SVPI Partner Recruitment Manual

Partner recruitment sustains your SVP and its mission. Bringing new Partners into your organization connects an ever wider pool of people to the dual benefits of the SVP model:

- Building the knowledge and capacity of philanthropists (Partners).
- Building the resources and capacity of nonprofits (Investees).

Ultimately, Partner recruitment is about improving your own community.

What is the purpose of this manual?

SVP Partner recruitment is a mission fulfillment responsibility shared by Partners, local SVP staff and SVPI. Partners tap into their networks and develop their own skills to bring new Partners into the organization, staff supports this work by ensuring a systematic and consistent approach to recruitment, and SVPI provides assistance in the form of best practices and tactical resources.

This manual specifically outlines how you can:

- Position your SVP for successful recruitment.
- Design a Recruitment Plan.
- Implement a system for Partner recruitment that includes:
    - Identifying prospective Partners.
    - Qualifying and prioritizing prospective Partners.
    - Cultivating prospective Partners.
    - Inviting prospects to become Partners.
    - Orienting new Partners in order to complete the recruitment cycle.
- Enlist and deploy an effective Recruitment Team.
- Communicate the benefits of SVP Partnership.
- Build your SVP's community profile.

How should I use this manual?

This manual offers a road-map for an interactive recruitment process at your SVP. Ideally, you will use it first to establish a Recruitment Plan and then to support your implementation activities. Throughout the manual, you will find definitions, specific action steps, case studies, tips, ideas, and worksheets. You will also find suggestions for benchmarking and evaluating each step of the recruitment process. Section 4 of this manual consolidates the worksheets, checklists and forms into one resource for your recruitment planning work.

Who should use this manual?

As a Partner-led organization, your SVP relies heavily on the engagement of existing Partners. This is especially true in the recruitment process. Section 3 of this manual will help you define a staffing and volunteer structure for your recruitment activities. It is most effective to involve these people in the earliest possible stages of recruitment planning in order to nurture their personal investment in the process.

How can I share my successes?

The SVP recruitment process is constantly evolving. We welcome your suggestions, samples and successes as you utilize this manual. Please forward these to Ruth Jones at SVPI, ruth@svpi.org. This manual will be revised and updated at regular intervals and your feedback is invaluable to this process.

The SVP Model and Recruitment

A key feature of the SVP network is that it is genuinely Partner led. While there are many reasons why people become SVP Partners, a personal connection through existing Partners is often a critical factor. Partners join not just an organization, but a community of people with a shared commitment. We rarely talk about "solicitation" or "fundraising" at SVP because we invite individuals into a dynamic and active group of engaged Partners. The SVP message framework supports this unique aspect of our work and will be addressed more fully in Section 3 of this manual. Additionally, the SVP model provides the basic underpinning of the recruitment process.

The SVP Model

The SVP model brings together worlds that typically do not overlap: grant making, volunteerism, nonprofit capacity building, and philanthropic education. Every SVP is a network of people who believe that they can have a positive impact on their communities and organizations and who use innovative strategies to address complex community issues.

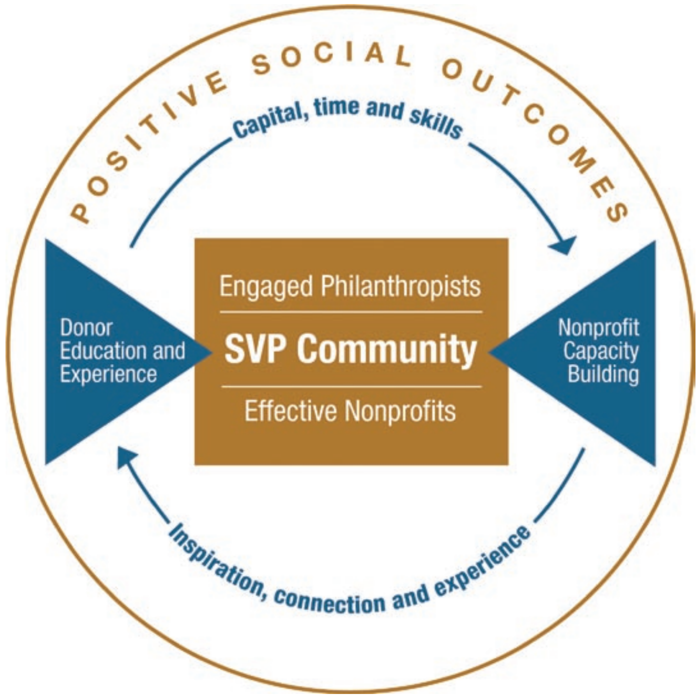
SVP Partners are individuals who make meaningful contributions to nonprofit organizations by sharing their skills, time, and financial resources. SVP Investees are nonprofit organizations that seek new resources and approaches for addressing a variety of issues, including education, environmental protection, and youth development.

One half of the SVP model is investment that builds the long-term capacity of organizations, rather than short-term projects or programs. Capacity building investments include cash grants, skilled volunteers, professional consultants, leadership development and management training opportunities. SVP Partners make an annual contribution of at least $5,000, and make decisions about how to share their collective investment. Partners provide volunteer support in areas including marketing and public relations, finance, technology, strategic planning, fundraising, board development, and human resources management.

The other half of the SVP model is the mobilization of a community of lifelong, informed, and inspired philanthropists. Through engagement with Investees, connections with SVP Partners and participation in education events, Partners are inspired to invest and reinvest in organizations associated with their SVP, and to increase their overall level of civic engagement.

> ***"I would call SVP the perfect storm for me: it had the ideal combination of educational events, individuals with whom I had a high level of comfort, and the dual mission was right on point. Plus, I already felt connected because I knew so many people in the organization."***
>
> — John Palter, Partner, Dallas Social Venture Partners

This graphic shows how the two elements of the model continuously reinforce each other.



SECTION 1

Before You Begin

Getting Ready: Pre-Planning Activities

Pre-Planning Step 1:
Putting Together Your Recruitment Team

SVP Partner recruitment is a team process. Therefore, it is highly recommended that you engage a **recruitment planning team** to develop your SVP's recruitment plan. This team should be comprised of individuals who will likely lead the implementation of the plan. Section 3 of this manual offers several suggestions for how to organize your staff and volunteer resources for the ongoing recruitment process.

Worksheet: Recruitment Planning Team (a reduced version of which appears below) can be found on the following page and in Section 4 of this manual.

TIP

Be sure to involve Partners at every stage of the recruitment planning and implementation process!

Worksheet: Recruitment Planning Team

Planning Team Job Description *(Define your core objectives, with the ultimate goal being the development of a recruitment plan)*:

- ☐ Define recruitment goals for SVP
- ☐ Assess SVP readiness for recruitment
- ☐ Engage core group of recruiters
- ☐ Craft a written plan for recruitment
- ☐ Communicate recruitment plan to Partners
- ☐ Other: ______
- ☐ Other: ______

Lead Staff Person:

Roles and responsibilities:

Lead Recruiter (Partner):

Roles and responsibilities:

Planning Team Members:

Roles and responsibilities:

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Lead Staff Person: ____________________

Roles and responsibilities: ____________________

____

____

____

Lead Recruiter (Partner): ____________________

Roles and responsibilities: ____________________

____

____

____

Planning Team Members: ____________________

Roles and responsibilities: ____________________

____

____

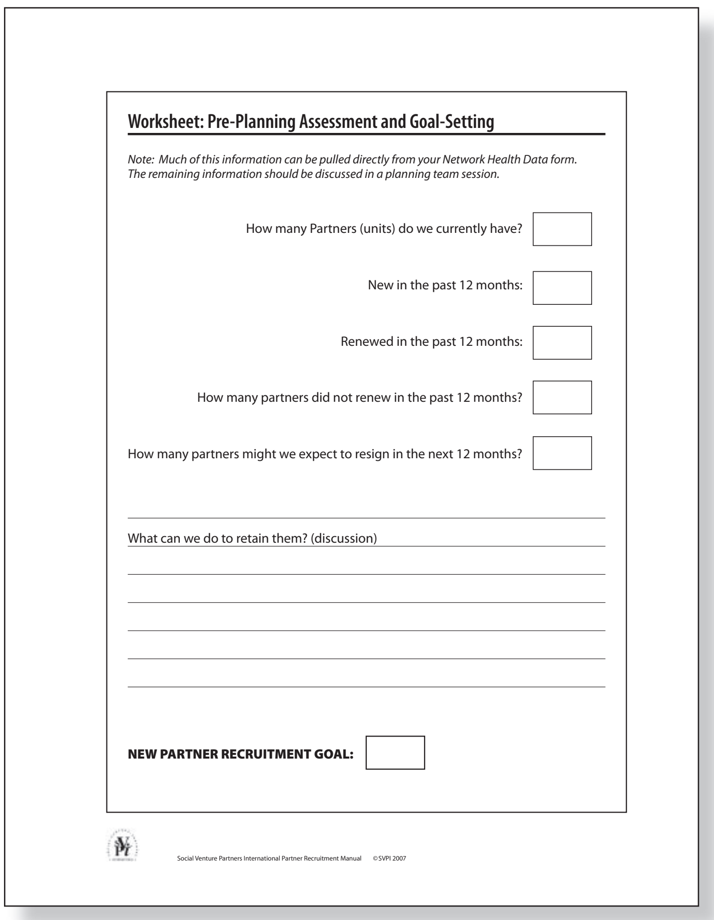
____

Pre-Planning Step 2: Defining Your Parameters

Every SVP seeks to find a balance between Partner recruitment and Partner engagement. There is a “sweet spot” in which the recruitment process yields a steady stream of new, enthusiastic Partners, while the SVP’s ongoing work offers plenty of engagement opportunities to retain existing Partners. When designing your recruitment plan, defining the parameters of this equilibrium is essential. This requires a brief assessment:

Worksheet: Pre-Planning Assessment and Goal-Setting (a reduced version of which appears below) can be found on the following page and in Section 4 of this manual.

You will emerge from this assessment with at least two issues to be addressed: new partner recruitment and existing partner engagement. This manual will guide you through the recruitment process. In 2008 – 2009, SVPI will roll out the Philanthropy Development Framework and Self-Assessment Tool, a comprehensive partner education and engagement resource that will help you map a similar plan for engagement.



Worksheet: Pre-Planning Assessment and Goal-Setting

Note: Much of this information can be pulled directly from your Network Health Data form. The remaining information should be discussed in a planning team session.

How many Partners (units) do we currently have?

New in the past 12 months:

Renewed in the past 12 months:

How many partners did not renew in the past 12 months?

How many partners might we expect to resign in the next 12 months?

What can we do to retain them? (discussion)

NEW PARTNER RECRUITMENT GOAL:

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NEW PARTNER RECRUITMENT GOAL:

Pre-Planning Step 3: Assessing Your SVP's Readiness

This manual proposes a very systematic approach to Partner recruitment, one that must necessarily be supported by strong database management using Salesforce.com and by effective communications tools. Furthermore, it assumes you have in place a solid organization that prospects will want to join. Therefore, it is advisable to conduct a brief "inventory" of your readiness to implement effective Partner recruitment and identify any remediation that should take place right away.

Worksheet: Systems and Tools Inventory (a reduced version of which appears below) can be found on the following page and in Section 4 of this manual. In general, a healthy and thriving SVP finds it easier to recruit new Partners. This worksheet helps you consider the assets, systems and tools you need in place for successful recruiting activities.

Note: This is not intended to replace the SVP Network Health Data form. It is simply a quick snapshot of your SVP's readiness to increase Partner recruitment activities.

Worksheet: Systems and Tools Inventory

MINIMUM ASSETS	CURRENT STATUS			REMEDIATION / NEXT STEP
	In Place	OK for now	Not Ready	
Partners who are equipped to promote your SVP				
A website and basic printed brochure that explains the SVP model and that clearly tells interested parties how to get involved				
Events that will attract new prospects				
A database system for tracking prospects such as Salesforce.com				

IDEAL ASSETS	CURRENT STATUS			REMEDIATION / NEXT STEP
	In Place	OK for now	Not Ready	
Strategic or annual plan for your SVP				
A consistent grantmaking cycle				
Highly engaged Partners				
Opportunities for new Partners to be engaged (e.g., active committees)				
A full set of communications tools (See Section 3 of this manual for the basic recruitment kit)				
Regularly- scheduled educational and social events				
Other:				

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Worksheet: Systems and Tools Inventory

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Regularly- scheduled educational and social events				
Other:				

The purpose of these pre-planning activities is not to slow down or stall the recruitment process. You can be actively seeking new Partners while simultaneously providing greater focus to the process by engaging in these pre-planning tasks. Don't let the term "planning" be confused with "delay"!

Note: SVPI has prepared the workshop "Telling Your SVP Story" which can be helpful in preparing your Partners to talk to new prospects about your SVP. Contact SVPI if you would like to arrange a presentation of this workshop for your Partners.

A word about Salesforce.com

This manual assumes that you are using Salesforce.com to manage your SVP's data. Salesforce.com is the common data management tool of the Social Venture Partners network. It is a customized solution that helps you manage information related to recruiting, Partners, Investee projects, grants to Investees, foundation grants, volunteer opportunities, and events.

A good database system for tracking prospects and recruitment activities is essential. If you have questions about how to use Salesforce.com for recruitment management, please refer to the Salesforce.com Users' Guide and/or contact the SVPI office. If you don't use Salesforce.com, it is highly recommended that you consider doing so. The SVPI office can assist you in determining how best to proceed with your data management needs.

The remaining sections of the manual will take you from the pre-planning stage into the step-by-step process of Partner recruitment.

SECTION 2

Partner Recruitment

Partner Recruitment: An Overview

Your SVP Partner recruitment plan will center around six key elements of success:

- The use of **RELATIONSHIPS** to identify, cultivate and invite prospects into the SVP community.
- A recruitment **TEAM** that includes Partners who are willing and able to "close the deal."
- A **FOCUSED SYSTEM** that maximizes your efficiency while allowing for personalization at key points in the recruitment process.
- An intentional investment of **TIME**. There is a direct correlation between the amount of time staff and Partners allocate to recruitment and the positive results you will achieve.
- A set of **STRONG TOOLS** available to the recruitment team, such as regularly-scheduled events, compelling communications tools, and a high-quality "pitch."
- A commitment to **PERSISTENCE**. A consistent calendar of contact and a careful follow-up strategy is essential for moving an interested prospect toward Partnership.

"Partner contact is key to recruitment. It's best if the referring Partner helps make the invitation, but either way, once a prospect has met our Partners, they're sold."

– Peggy Kidd, Executive Director, San Diego Social Venture Partners

"Our Partnership grew by 42% during the first year that we instituted a recruitment system."

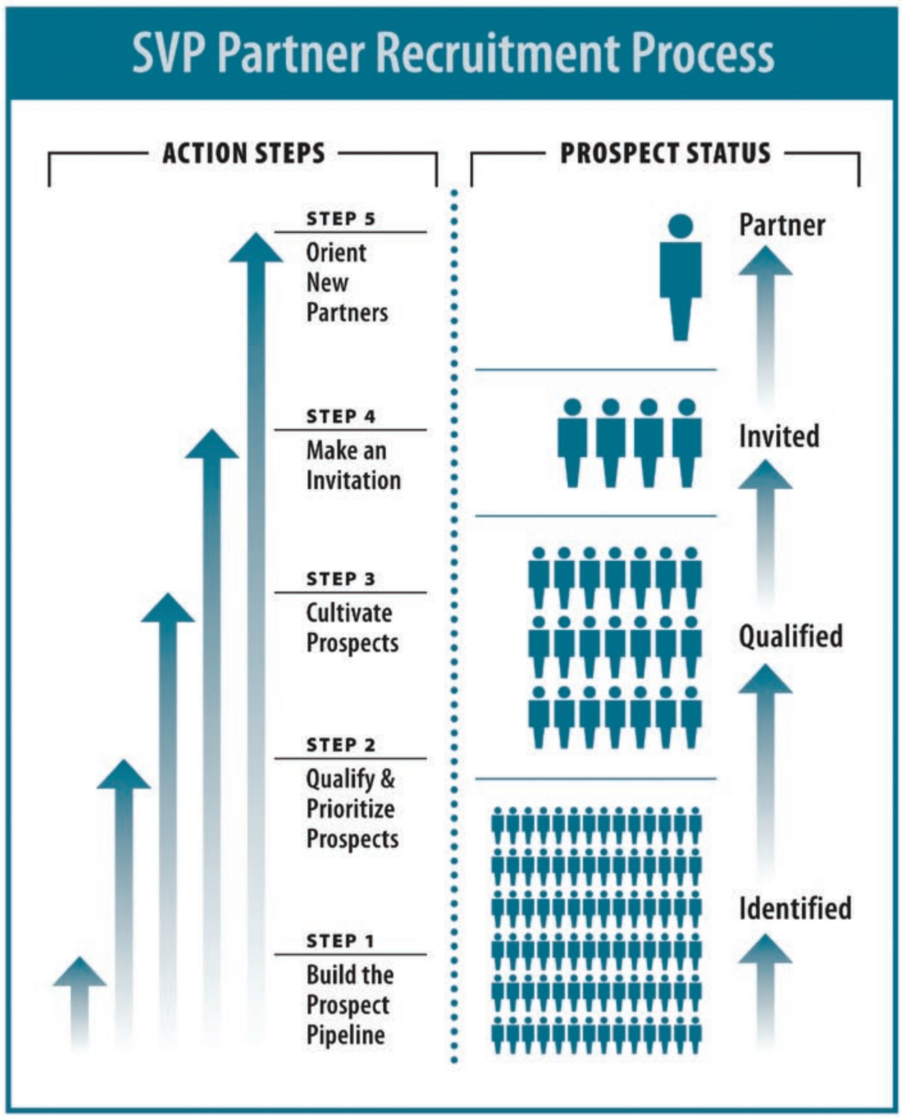
– Linda Springer, Executive Director, Cleveland Social Venture Partners

"Recruitment takes patience and persistence. Never give up until they tell you to stop. We have Partners that took 4 or 5 years to get on board."

– Paul Shoemaker, Social Venture Partners Seattle

The SVP Partner Recruitment Process

This manual proposes a five-step recruitment process that concentrates your work at several levels of prospect engagement. Your goal is to utilize a system of action steps to identify and cultivate the most qualified prospects for Partnership. You will start by building the prospect pipeline, move up to qualifying and prioritizing prospects so that you focus your efforts on the most likely candidates, cultivate priority prospects, and, at the right moment, invite them to join your SVP. Once on board, you will orient them so that they become engaged Partners who will renew their own membership and refer other individuals for Partnership.



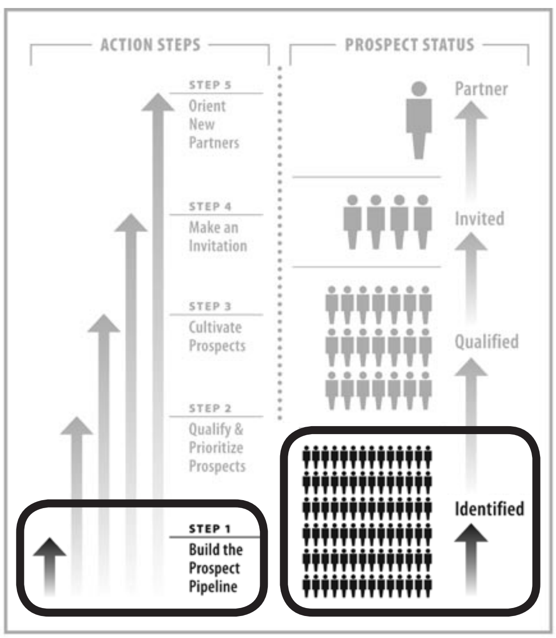
The next sections of this manual will take you through the SVP Partner Recruitment Process step by step.

Step 1: Build the Prospect Pipeline

PROSPECT:
A person who might have interest in your SVP based on evidence of philanthropic interest and financial capacity.

Building a pool of prospects is an intentional process that begins with your existing Partners. It is everyone's job to identify prospects. Some SVPs estimate that it takes as many as 20 prospects to yield one Partner. At this stage of your recruitment plan you will cast the net wide. Later, you will focus more intently on specific prospects. But for the moment, think big and out of the box. Remember, this is an inclusive process. Ask as many people as you can for prospect leads.

It is important to have an active marketing and outreach program to augment and support your direct referral activities. See Section 3 of this manual for ideas on building a strong community profile.



Checklist

How to Generate Prospect Referrals (in order of effectiveness)

- ____ Include prospect referral as part of your Board's job description. Then follow-up with Board members regularly to secure their prospect suggestions.
- ____ Target specific Partners as strong referral resources and ask them to sit down with you and brainstorm. This works particularly well in a small-group setting.
- ____ Network with relevant organizations and ask colleagues for prospect ideas.
- ____ Talk to the leaders at organizations with a shared interest and ask for referrals.
- ____ Encourage all Partners to make referrals. This is much easier when Partners understand what will happen once the referral is made. They need to understand what their continued role, if any, might be in the recruitment process and how your SVP will approach the prospect.

TIP

Tap into the SVP Network – many cities have recruited multiple new Partners from referrals in other cities.

The 80/20 Rule

The 80/20 rule applies to prospect referrals. 80% of your prospects will be referred by 20% of your Partners. Focus is essential, so target your prospect identification efforts on those who are most likely to deliver, while still encouraging all Partners to provide names.

Building the prospect pipeline

Share this diagram with your Partners and recruiting team to get their creative juices flowing…

WHO DO I KNOW?

- Friends
- Family
- Neighbors
- Community Members
- Business Associates
- Other

WHERE AM I CONNECTED?

- Employer
- Relevant Organizations and Associations – Rotary, Chamber, etc.
- Other Boards
- School
- Other

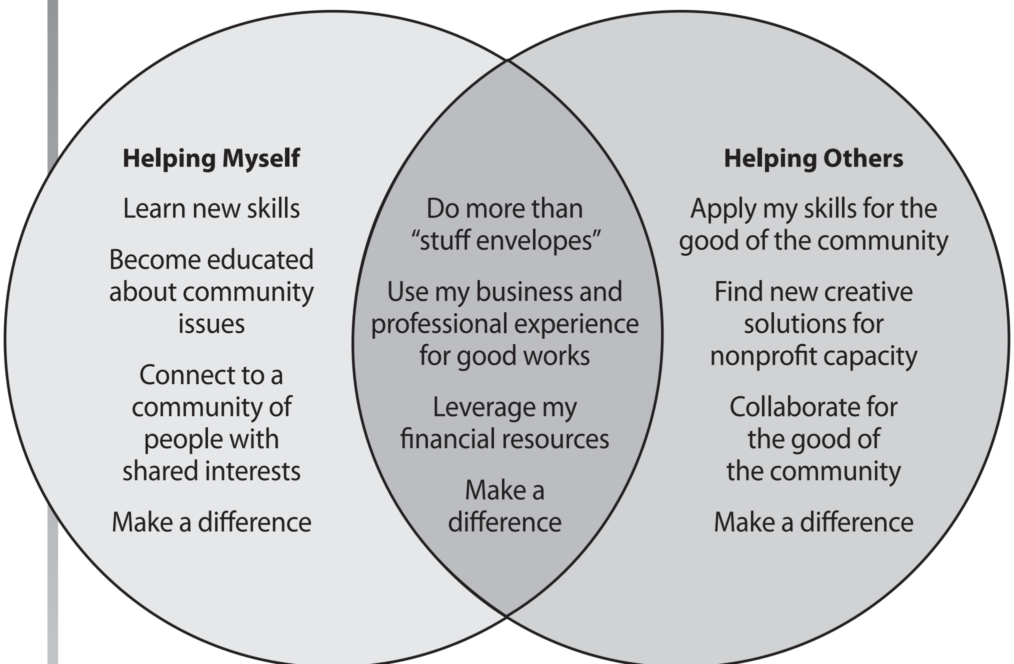
WHO HAS A SHARED INTEREST?

- Community Foundation
- Other Nonprofits
- Wealth Advisors
- Other SVPs
- Investees
- Other

It is helpful at this point to carefully consider the type of person who joins SVP. Potential SVP Partners are typically trying to answer two questions:

- How can I help others?
- How can I enrich my own life?

Your SVP offers the answer to both of these needs:



The SVP Message Framework appears on page 32 of this manual. It is a useful tool for mapping out key messages for your prospects.

> ***"I was looking outside of myself for more meaning. It was time for me to give back."***
>
> – Polly Hopkins, Partner, Social Venture Partners Seattle

Idea: Corporate Partnerships

Some SVP affiliates have had success attracting corporate sponsors. One model is to ask a company to sponsor two Partners at $5,000 each. This is a great way to help corporations provide unique employee benefits while attracting new Partners to your SVP.

Reaching Out to a Diverse Community

A diverse Partnership contributes directly to the fulfillment of your SVP's mission. Forming positive relationships with relevant organizations and communities can help you diversify your membership and enrich the services you provide to Investees. Reach out to diverse business associations, philanthropic organizations and social networks.

IDEA: "Membership Month"

Calgary SVP makes a big push for new membership in the month of March. The staff and Partners all dedicate more time to recruitment activities during this month and they hold as many as five recruiting events. While they do engage in recruiting activities all year, this special month provides extra incentive for Partners to make new referrals.

The System: How to Manage Prospect Referrals in Salesforce.com

The Prospective Partners tab in Salesforce.com allows you to track prospects' history and activity from the time they're introduced until they become a Partner or it has been determined that they are not qualified or interested. Salesforce.com will help you in your task of moving prospects towards Partnership. It is not intended to be a flat or stagnant database. It is an active tool that can guide your daily work with individual prospects and groups of prospects.

Enter every prospect into Salesforce.com using the guidelines provided in the Prospective Partners section of the Salesforce.com Users' Guide.

It is particularly important to:

1. Link each new prospect to a referring Partner.

2. Assign them to a member of the Recruiting Team who will be responsible for cultivating their interest in your SVP.

3. Identify a next action step and due date. In most cases this will be sending a an introductory packet of material. The more you can standardize this step, the more efficient you will be.

4. Invite them to upcoming events.

If you have more questions about how to use Salesforce.com to manage the data for your recruitment process, refer to the Salesforce.com Users' Guide or contact SVPI staff at info@svpi.org.

Benchmarking and Evaluation

Determine how many viable prospects you need in the pipeline in order to achieve your recruitment goal. You can do this by evaluating last year's results against the number of prospects you followed up with in some way, or for the time being, estimate that you'll need up to 20 prospects to yield one Partner.

You will also track the number of Partners who regularly refer prospects on your Network Health Data form.

Be careful cleaning up your database!

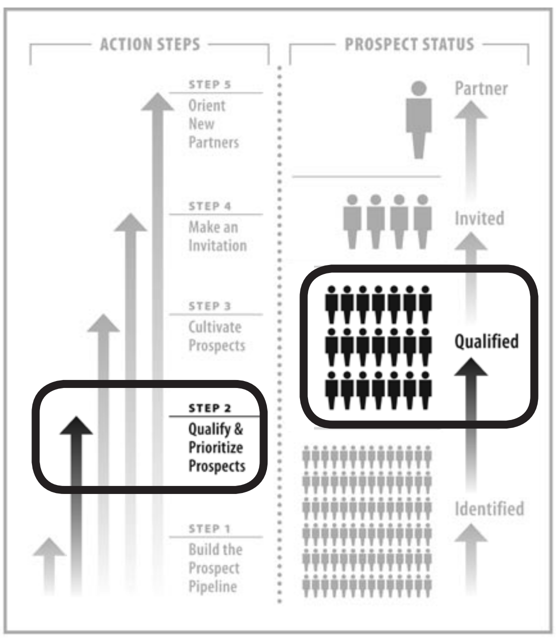
It can be tempting to remove a non-responsive prospect from your database, but remember that it can take years for a prospect's needs to dovetail with SVP's unique offerings. SVPI recommends that you never delete a record from Salesforce.com; rather change the prospective partner status to "Not Interested" or "Unqualified." If you remove the record altogether, there will be no historical reference to your interaction with that individual.

Step 2: Qualify and Prioritize Prospects

HIGHLY QUALIFIED PROSPECT:
There are indications the prospect has an interest in your SVP and the resources to become a Partner.

PROSPECT PRIORITIZATION:
Deciding where to focus your efforts in order to yield the greatest results.

In Step 1, we talked about how to "identify" new prospects. Once they are in the prospect pipeline, it is important to prioritize prospects so that you can target your recruitment work where it will be most productive. In order to do this, you must designate a ranking for every prospect in your database.



There are many coding or ranking systems and you will need to develop one that best fits your SVP. The most important thing is to have a system that is used consistently and that is action-focused. For every prospect code, there must be a "next step" associated with it.

Here is one coding system you can use for prioritizing your prospects:

Code	Prospect Status	Possible Next Step
Open	Indicates they are a new prospect.	Assign a Recruiting Team member or Executive Director to make contact. Invite them to an event.
Interested	Have indicated they'd like more information about becoming a Partner.	Provide more information, preferably in a face-to-face setting. Try to determine if they are *Qualified* (have the resources to invest in Partnership).
Qualified	Have indicated that they have the resources to become a Partner.	Provide more information, preferably in a face-to-face setting. Try to determine if they are *Interested*.
Highly Qualified	Have indicated that they have the resources *and* the interest to become a Partner.	Assign a Partner or staff person to sit down with the prospect and invite them to become a Partner.

Unqualified	Do not have the *resources* to become a Partner.	Keep prospect informed over time in the event that their capacity to give changes.
Not Interested	Do not have the *interest* to become a Partner.	Allocate no further resources to this prospect, unless their interests change.

Your recruitment team will pay the most immediate attention to "highly qualified" prospects. However, just because a prospect does not quickly move from "open" to "highly qualified" does not mean they are not a prospect. It just means they are not your top priority at the moment.

Some SVPs choose to use a slightly simpler coding system. Here is how San Diego Social Venture Partners codes its prospects:

Code	Prospect Status	Possible Next Step
A	Highly Qualified – indicates strong interest and capacity to give.	Assign a Partner or staff person to sit down with the prospect and invite them to become a Partner.
B	Interested —has directly expressed an interest. For example, by attending an SVP event or requesting materials.	Assign a Partner or staff member to invite them to coffee or lunch to talk about their interest in your SVP.
C	Identified	Tag them in database to receive invitations to events and regular mailings.
X	Not interested or Unqualified	Determine if this is a temporary or permanent status and establish a future strategy for reconnecting, if appropriate.

Whatever coding system you use will provide direction for how you follow up with prospects. Using it will save you time, money and energy by focusing your efforts on the most promising candidates.

Segment your prospects

You may want to segment your prospects into target populations that reflect your SVPs current strategic approach to expansion. Possible categories include:

- Geographic Location
- Age
- Diversity
- Corporate
- Particular Professions
- Skill Sets
- Other

The System: How to Prioritize Prospects in Salesforce.com

It is important that you indicate every prospect's ranking or priority code in Salesforce.com. This ranking helps generate reports for the recruitment team and also manage mailings and event invitations. For example, some mailings will go to the entire database of prospects (such as a save-the-date postcard for an event), but some more expensive items (such as the Annual Report or an invitation to a very exclusive event) may go only to highly ranked prospects.

Case Study: Dallas SVP

"In Dallas, we had a series of really successful events that significantly boosted our email list of prospects. Prioritizing a large influx of names can be difficult. So, we organized our follow-up work around two kinds of prospects:

- "Hot Prospects" – people we have touched in some way in the past four months and that were reported as showing some interest (e.g., asked for materials).
- "Qualified Prospects" – people with a referring name connected to them in Salesforce.com and who we knew were capable of making a $5,000 commitment.

"We emerged with a workable list of about 50 prospects and assigned the names to our Membership Committee, whose task it was to contact them directly."

— John Palter, Partner, Dallas Social Venture Partners

Benchmarking and Evaluation

Qualifying and prioritizing prospects is one of the most important elements of a successful recruitment program. If you do not already have the following systems in place, implementing them should be an urgent priority.

1. Definition of what makes a prospect "highly qualified" at your SVP.
2. A ranking or coding system for prospect interest levels.
3. Every prospect in your database has a rank or code associated with his/her name.

Once your system is in place, measure your success in qualifying and prioritizing prospects by completing the following assessment:

____ Are you checking your list of "highly qualified," "interested" and "qualified" prospects at least once a month to ensure follow-up is occurring?

____ Does every "open" prospect have a Partner or staff person assigned to them?

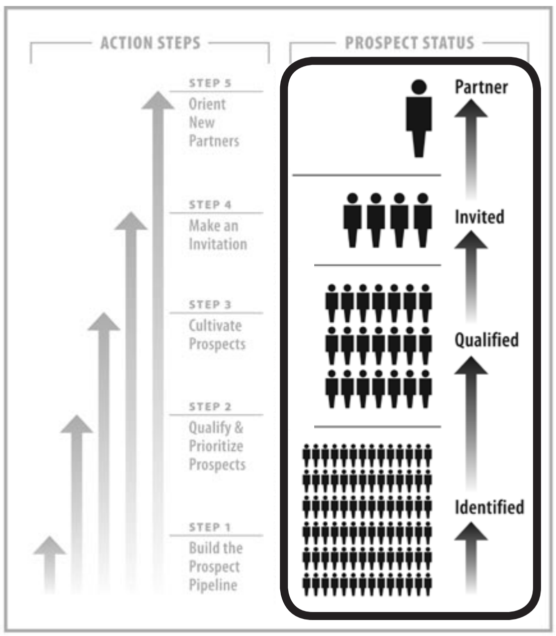
____ Are contact assignments occurring in a timely manner? For example, how long does it take for an invitation to be extended when a prospect is deemed ready? Can that process be accelerated?

Step 3: Cultivate Prospects

CULTIVATION:
Nurturing a prospect's interest in and understanding of your SVP to the point that he or she is ready to be invited to become a Partner.

Cultivation often feels like the most intangible aspect of the recruitment process. However, by focusing on the concept of *movement* for individual prospects and groups of prospects, you can establish a system for cultivation.

The central concept in cultivation is to move each prospect up the recruitment spectrum:



At each stage, your job is to inform and engage prospects to the extent that they will move up to the next stage. This can be done by employing three key strategies:

Cultivation Strategy 1: Allocate TIME to cultivating prospects

The most critical element of cultivation is TIME. Some SVPs estimate it takes up to 10 contact hours to convert a prospect into a Partner. This can be achieved most effectively when you:

- Engage existing Partners in the cultivation process
- If applicable, allot a specified amount of the staff's time specifically to cultivation responsibilities

> ***"Success in recruitment is directly proportional to the amount of time you put into it."***
>
> — Linda Springer, Executive Director, Cleveland Social Venture Partners

Cultivation Strategy 2: Implement a SYSTEM that is applied to every prospect

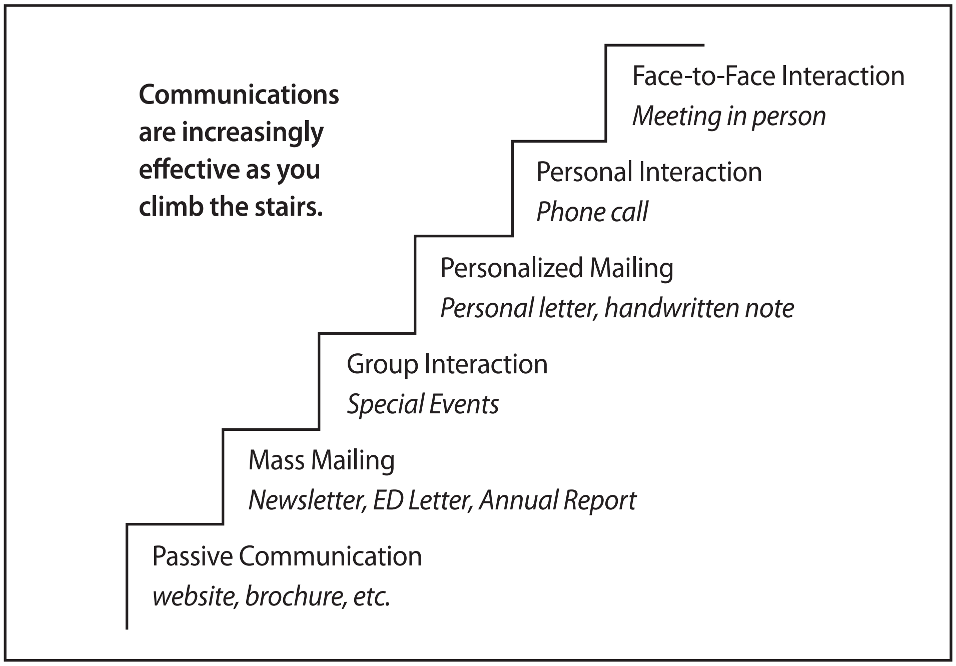
The more automated your recruitment process, the more effective it will be. A routine will ensure that prospects don't fall through the cracks.

You should create a specific set of activities for every stage of the recruitment spectrum. Of course, even with a system in place, a more customized approach will be necessary the higher up the recruitment spectrum a prospect moves. See the coding system on page 18 for examples of the kinds of activities you will implement at every level.

Cultivation Strategy 3: Keep up a CONSISTENT COMMUNICATIONS strategy

The more a person knows about your SVP before you invite them to join, the easier the invitation will be when the time comes. Word of mouth is, of course, key to building positive impressions of your SVP. However, a regularly scheduled series of communications opportunities can help maintain a prospect's interest and ensure your SVP is top-of-mind when the prospect is ready to consider a new philanthropic investment.

Your overall recruitment strategy should feature each level of the following stair-step of effective communications:



TIP

Ideally, your prospects should hear from you once a month, including event invitations.

At the lower end of this stair-step approach, you will establish a very structured calendar of mailings. At the upper end of the stair-step system, you will organize your activities on a prospect-by-prospect basis, moving upwards at the pace that is appropriate for each individual.

Sample: Calendar of Mass Mailings

Every four weeks:	Invitation to networking/education events
Every six weeks:	Newsletter
Quarterly:	Letter from the Executive Director
Bi-Annually:	Invitation to special gatherings
Annually:	Annual Report

Using Events to Cultivate Prospects

Events are an essential part of the relationship-based SVP model. They engage Partners, support Investees, and serve as important cultivation opportunities for prospects.

Successful SVP events tap into three essential Partner and prospect interests:

- Networking with peers
- Education about community issues
- Connection to Investees

You will necessarily have a unique event calendar for your SVP that is reflective of your community. Here are some guidelines for all good events:

- Let Partners know in advance of an event which prospects will be in attendance so that they can be sure to say "hello" and find out more about the prospect's interests.
- Test different formats, different days and different times for your events. Evening events don't go over well in Denver. San Diego alternates monthly from one side of the city to the other. Some people like luncheons, others prefer cocktail hour. Figure out what works by testing, testing, testing. You can help determine what works for your Partnership by asking them to complete a Partner profile. They can do this online through the Partner Update Website linked to Salesforce.com. To find out more contact SVPI staff at info@svpi.org.
- Consider asking Board members to host cultivation events at their homes.
- Recruit guest speakers with strong name recognition.
- Always have a "call to action" at the end of each event. Make it easy for people to know how they can be involved.
- In all cases, connect prospects directly with Partners and Investees.
- And, remember, events are just as valuable for keeping your existing Partners engaged as they are for recruiting new Partners!

Case Study: Events at Social Venture Partners Denver

Like many SVPs, Denver offers monthly First Friday Luncheons. Held at the Wine Coopery in downtown Denver, the events typically attract up to 20 people. "A lot of people who aren't that involved in other committees make time for these events," says Social Venture Partners Denver Executive Director Lisa Fasolo-Frishman.

A typical schedule for Denver's First Fridays is:

11:30 a.m. – 12:00 p.m.	Guests arrive and mingle
12:00 – 12:30 p.m.	Introductions of everybody around the room
12:30 – 1:00 p.m.	Guest speaker presentation (speakers have included Investees, representatives of Denver initiatives related to funding priorities, Partners who've done interesting things, nonprofit sector professionals, philanthropists, and others)
1:00 – 1:30 p.m.	Guests talk at tables

The educational element of these luncheons is appealing to new prospects and to existing Partners.

"I'm involved in a lot of things and this is the most enjoyable and most meaningful. I've met a lot of people through SVP who have helped me learn about what else is going on in Denver—in the civic, the political and the nonprofit world—that I would not have learned otherwise."

— Andy Fine, Partner, Social Venture Partners Denver

In addition to the monthly First Fridays, Social Venture Partners Denver holds four signature events per year:

1st Quarter:	Meet the Grantees
2nd Quarter:	Maximizing your Philanthropic Dollars
3rd Quarter:	Summer Social Hour
4th Quarter:	Annual Partner Meeting

The System: Keeping Prospects Moving via Salesforce.com

Each time contact is made with a prospect, a note must be entered into Salesforce.com and a next action date indicated. Often members of the committee have access to Salesforce.com and enter their notes and schedule follow-up instructions themselves. However, this is sometimes a centralized, staff function, so it is a good idea to have a Contact Report Form that, once completed, goes to the person entering data into Salesforce.com.

Contact Report Form

Date: ______________________

Prospect Name(s) ______________________

SVP Representative(s) ______________________

Circle one: Phone Call Meeting Email Event Other

Comments: ______________________

NEXT ACTION STEP

Due Date: ______________________

Assigned to: ______________________

Activity: ______________________

Comments: ______________________

Social Venture Partners International Partner Recruitment Manual ©SVPI 2007 DRAFT 9-11-07

Contact Report Form

Date:

Prospect Name(s)

SVP Representative(s)

Circle one: Phone Call Meeting Email Event Other

Comments:

NEXT ACTION STEP

Due Date:

Assigned to:

Activity:

Comments:

Benchmarking and Evaluation

You can track your prospect cultivation progress through Salesforce.com in the following ways:

1. How many prospect "contacts" are being made per month at each level of your prospect coding system?
2. How many prospects are moving up the recruitment spectrum from one stage to the next? (For example, how many prospects were converted from "identified" to "qualified" in the past month?)

It is important to track these elements of your recruitment process so that you can begin to associate them with your results. You might also want to track the number of cultivation hours are being spent by Partners and staff. It is almost certain that you will begin to see that the more contact hours you initiate with prospects, the more Partners you will recruit.

Step 4: Make an Invitation

INVITATION:
The moment at which a prospect is asked to become a Partner.

How do we know the prospect is ready?

The most difficult part of the invitation is knowing when it should occur. The truth is that only the prospect can tell you for certain if he or she is ready to become a Partner. So, the only way to know is to ask them directly. This is infinitely easier if the prospect has been assigned to an SVP contact who has implemented a cultivation strategy as outlined in the previous section. They will have spoken to the prospect and, more importantly, listened to the prospect to understand where your SVP fits into the prospect's thinking at the moment.

When you invite someone to become a Partner, you are offering them an opportunity to fulfill their own personal needs through the benefits of the SVP model.

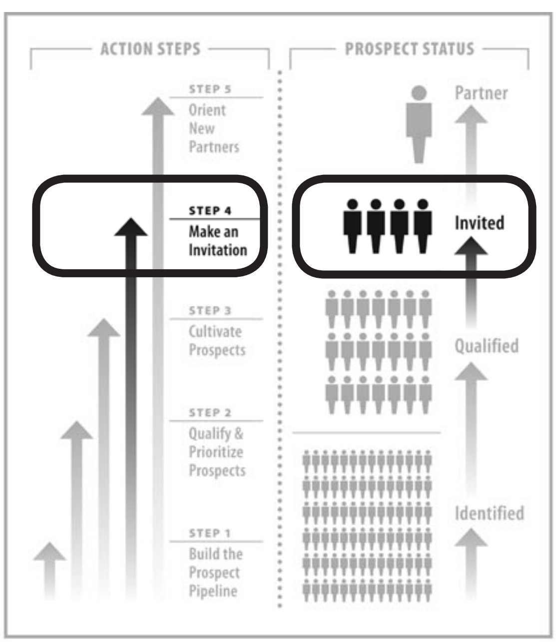
Who should make the invitation?

Many SVPs find that the recruitment process gets "backed up" because the only person actually making invitations is the executive director or another staff member. Partners can, and should, play an active part in the invitation process. It is not realistic to expect that all Partners will become adept at or even comfortable with asking prospects to join your SVP. Therefore, it makes sense to train and deploy a few motivated Partners to take on this role. Section 3 of this manual has some suggestions for organizing a Recruitment Team.

How do you make the invitation?

By extending an invitation to join your SVP, you are not asking for something for yourself. You are offering an opportunity for someone to fulfill their own personal needs through the benefits of the SVP model. However, it often feels like "asking" for money which tends to make many people nervous. Some of this apprehension can be overcome by breaking the invitation down into some very simple steps that can be applied to every invitation meeting.

Use the following SVP Partner Invitation Guide to refresh your own skills and train others to be confident and successful recruiters.



SVP Partner Invitation Guide

1. Agree on a strategy

Talk with a member of the recruitment team, the SVP executive director, and/or someone else who knows the prospect. This will generate ideas about how to position your SVP for maximum effect and enable you to be sensitive to the needs and interests of the prospect.

TIP

If more than one person is going to make the invitation, be sure to determine who will say what during the meeting and establish that each person has an important role to play.

2. Make the appointment

It is always best to make the appointment with the prospect yourself, rather than through intermediaries. Telephone directly if you know the prospect. If you don't know the prospect well, you may want to send a brief note before you call. When you do call, be direct about the purpose of your call. Explain that you want to talk with them about SVP and how it can meet their needs.

3. Prepare for the meeting

Remember – this meeting is as much about listening as it is about talking. Prepare a brief set of talking points that will communicate a few key ideas and that will generate a conversation. Do not plan a long one-sided presentation that leaves no room for you to learn more about the prospect. Keep in mind the following engaging topics:

- What distinguishes SVP from other organizations.
- Why you are personally committed to the SVP model.
- How joining your SVP will enable the prospect to help others.
- How joining your SVP will enrich the prospect's own life.

Refer to the message framework on page 32 as you develop your talking points. And revisit page 14 to consider what motivates this particular prospect.

Most importantly, practice. Determine exactly how you will extend the invitation and say it aloud several times.

4. Conduct the meeting

- Be at ease! Make small talk and get settled into a friendly conversation before you start making the pitch.
- Transition to SVP. A good way to move into your talking points is to first ask the prospect how they've been enjoying learning about your SVP so far. They will likely be happy to talk about their experiences at events or their reactions to mailings they've received. Don't hesitate to ask them what's important to them in their philanthropy.
- Make a brief presentation. Based on the talking points you prepared in advance and any new information you've gleaned during the conversation so far, tell the prospect why you believe the SVP model is so valuable and why you think they'd benefit from being a Partner.
- Allow your prospect to respond to the presentation before you finalize the invitation. They may have already said "I want to be a Partner," which means that you simply have to explain the next steps involved. However, it is likely that you will need to directly invite them to join. This is not a "hard sell." Your invitation can be as simple as: "We'd love to have you as a Partner. Would you be interested in joining?"
- Let them answer! Many times the recruiter feels uncomfortable at this point and starts to undermine the request by continuing to talk. Allow the prospect whatever time it takes to think and then respond to your invitation.
- Handle the response. There are really only three possible responses that the prospect might make to your invitation:

YES

Well done! Tell them exactly what will happen next and be sure to follow up with all necessary paperwork to get them on board right away.

I NEED SOME TIME TO CONSIDER THIS

This is a very typical answer and often means the prospect needs to discuss the idea with their significant other or financial advisor. See if there is additional information you can provide and then establish a firm date when you will call to follow up.

NO

This is the least likely response. First, these prospects are highly qualified thanks to your efficient recruitment system. Second, few people like to say "no" to someone's face. Third, they probably wouldn't have agreed to the meeting if they were totally opposed to the idea of joining. In the event that it does happen, ask the prospect why he or she isn't interested in joining and try to determine what, if anything, would make them consider joining at a future date. Ask them if there are other ways they'd like to be involved at this time. Remember, this might be the beginning of a long-term relationship with your SVP. Don't take it as a personal or permanent rejection.

TIP

You can use a standardized Power Point presentation for part of the meeting. It can help structure the messages and establish a shared basis of understanding. But remember, keep it brief.

5. Follow Up!

- Send a nice note thanking the prospect for their time and reiterating next steps.
- Make sure all next steps are implemented and that follow-up occurs in a timely manner.
- Complete and submit a Contact Report Form so that all pertinent information about the meeting can be entered into Salesforce.com.

> ***"You can't strong-arm someone into becoming a Partner. This is a soft sell. Really, the SVP model sells itself."***
>
> — Alan Sorkin, Partner, San Diego Social Venture Partners

SVP Message Framework

POSITIONING *The philosophy that drives the organization*	Social Venture Partners is an international network of accomplished individuals who combine the power of business and the passion of philanthropy. We bring our collective expertise and resources to promising nonprofits, collaborating with them to impact communities.			
TAGLINE *What makes SVP special*	**Social Venture Partners** Invest. Engage. Advance.			
ELEVATOR SPEECH *What SVP does*	SVP is a network of engaged donors that brings together nonprofits and philanthropists to learn from each other and build capacity for positive community impact. SVP welcomes Partners from diverse backgrounds who want to pool financial contributions and skills to provide more resources to nonprofits and produce greater results.			
AUDIENCES *What interests SVP audiences*	<u>Prospective Partners</u> Interested in being hands-on, using their skills; like the "multiplier effect" and seeing a direct impact; interested in being "more "philanthropic"	<u>Current Partners</u> Most interested in how their time and money can make a greater impact	<u>Opinion Leaders</u> Most appreciate SVP teaching people how to be effective philanthropists and engage with the broader community	<u>Nonprofits</u> High opinion of Partner insight and experience; appreciate grant money; like capacity-building approach
BENEFITS and ATTRIBUTES *Messages about what SVP offers*	<u>Engaged Philanthropy</u> *SVP offers opportunities to make financial and hands-on contributions to the community.*	<u>Pooled Resources</u> *SVP provides a way to make a greater positive impact on the community.*	<u>Donor Education</u> *SVP gives new philanthropists opportunities to learn.*	<u>Capacity Building for Nonprofits</u> *SVP gives funding and services to expand nonprofit capacity.*
FEATURES *Detailed messages about the benefits*	▪ Partners can volunteer their expertise to SVP nonprofits. ▪ Partners make grantmaking decisions in issue areas they are interested in.	▪ Donations from Partners are pooled to fund multi-year grants. ▪ Wide variety of Partner skills provides broad range of expertise to nonprofits. ▪ Partners network and collaborate with peers.	▪ Numerous seminars and workshops ▪ Experiential learning through engagement with nonprofits ▪ SVP's Knowledge Management System consolidates learnings to provide access to a deep wealth of information.	▪ Grants, usually long-term, are given to innovative nonprofits. ▪ Services (from legal to public relations) are offered to nonprofits. ▪ Professional evaluation and results measurement are utilized to assess progress.

Benchmarking and Evaluation

Measure your success at this stage of recruitment in two ways:

Level of activity:

__ how many people are actively making invitations?

__ how many invitations are occurring each month?

Success rate:

Number of New Partners ÷ Number of Invitations = Success Rate

Example: 2 new partners ÷ 3 invitations = 66% success rate

You will also track the number of Partners who regularly close prospects on your Network Health Data form.

Step 5: Orient New Partners

ORIENTATION:
Positioning a new Partner for maximum engagement.

The first few weeks of a Partner's experience are vital to a lasting and fruitful relationship. You must extend the recruitment system through this stage by applying immediacy and discipline to the process.

Sample: Orientation Process

Within 24 hours:

1. Make a welcoming phone call. This is an ideal role for existing Partners.
2. Send welcome packet, including Partner Handbook. (Section 4 of this manual has a sample Partner Handbook.)

Within 4 weeks:

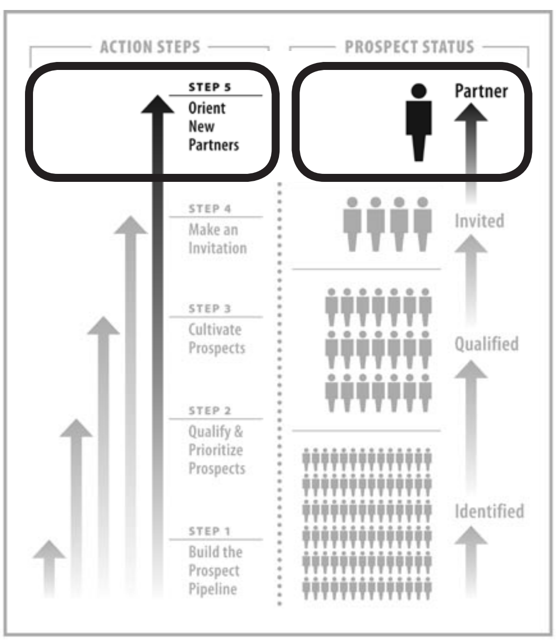
1. Conduct orientation meeting.

   This is ideally done as a group to help build Partner connections, however one-on-one meetings can work quite well as a back-up.

2. Plug them in.

   Help the new Partner decide exactly how they will be involved right away. Some good ideas include sitting on the next investment committee or playing a role on an Investee team.

SVP is a self-renewing concept that relies totally on Partner engagement and retention for maximum social impact. As mentioned earlier, in 2008 – 2009, SVPI will roll out the Philanthropy Development Framework and Self-Assessment Tool, a comprehensive partner education and engagement resource that will help you map a plan for engagement.



Benchmarking and Evaluation

To measure the effectiveness of your orientation program:

1. Track the percentage of Partners who attend an orientation meeting (it should be 100%).
2. Survey your Partners to determine their level of satisfaction with the orientation process.
3. Compare a Partner's level of overall satisfaction in the first year with whether or not they attended an orientation meeting. (SVPI suggests that you survey your Partnership on an annual basis to understand their level of satisfaction with their involvement. You can include orientation questions in this process.)

Idea:

Dallas has recently retained an Engagement Manager on staff. This person is responsible for getting and keeping Partners engaged — including encouraging them to refer new prospects.

SECTION 3

Recruitment Infrastructure

The Recruitment Team – Roles & Responsibilities

Section 1 of this manual helped you put together a recruitment planning team. Once you have a recruitment plan in place, you will assemble an ongoing recruitment team to implement your plan. Usually, your planning team members will be eager to stay involved and help realize the vision they have created.

It is essential that you develop specific job descriptions for your team members and define exactly how the lead staff person will support Partner activities. Here is one suggestion for the division of labor for the recruitment team:

Lead Recruiter (Partner):	Enlist team members. Guide the implementation of the recruitment plan. Prepare and lead agendas for team meetings. Represent recruitment team at other SVP meetings. Perform all other team responsibilities (see below).
Lead Staff Person:	Enlist team members. Help guide the implementation of the recruitment plan. Schedule and attend team meetings. Offer training to team on how to make an invitation. Provide recruitment materials to team. Enter data and extract reports from Salesforce.com. Ensure coordination with other SVP committees and activities.
Recruitment team members:	Attend team meetings. Participate in invitation training. Help prioritize prospects. Regularly review priority prospects. Be assigned 10-12 prospects from Salesforce.com and implement SVP Recruitment Process for each of them, including: Making introductory calls to prospects Attending personal meetings with prospects Greeting prospects at events Making follow-up calls Inviting prospects to become Partners
All Partners	Refer prospects to the recruitment team, including contact information and some ideas about the prospects' interests. Help cultivate prospects at SVP events and other opportunities. Bring prospects to events Participate in recruitment team activities whenever possible, including invitation training.

Different SVPs have different names for their team. Here are some ideas:

Membership Committee

Membership Growth Committee

Membership Working Group

Partnership Committee

Recruitment Committee

Building a Recruitment Culture

It is important to build a culture of recruitment at your SVP. Talk about recruiting at every meeting. Make it easy for people to introduce their friends to SVP. Give everyone the tools to help in whatever way they can: training, materials, messages. Communicate results so that everyone feels confident about the process.

Case Study:

Dallas Social Venture Partners has a Membership Committee that meets monthly. They also have two sub-committees. One is working on improving their use of the prospect tracking system and the other is addressing minority recruitment.

Materials and Messages

Your recruitment team needs compelling messages and strong materials to convey the benefits of SVP Partnership. The SVP Message Framework on page 32 will help you develop the key points that should be included in all communications. Once your messages are articulated in a clear and concise manner, they can be incorporated into the following basic materials kit (samples appear on the following pages):

TIP

It is a good idea to create materials that address various levels of interest. A small brochure can stand alone as a take-away or mail piece, and can be incorporated into a full packet for a more interested prospect.

Presentation Materials

- A brief verbal pitch for use over the telephone, at parties or in the proverbial elevator.
- Talking points to help prepare for meetings and presentations.
- A PowerPoint for group presentations.

Recruitment Packet

- Cover Letter
- One-Page Overview
- SVP Brochure
- Annual Reports (SVP and SVPI)
- FAQs
- Articles about SVP, philanthropy, capacity-building
- Press Releases
- Event Invitations
- List of Partners and their affiliations

Additional Materials

- DVD presentation
- An excellent website

Raising Your Community Profile

A strong marketing and outreach plan will support every step of the SVP Partner Recruitment Process by building awareness and credibility. The recruitment process is always easier if the prospect has confidence in your SVP before you begin cultivating them.

The work you've already done in the Materials and Messages chapter of this manual will help you raise your profile and build a positive reputation. The following ideas are not intended to be a complete description of a marketing plan, but rather a brainstorming tool for your recruitment team:

OUTREACH
Target the places where your prospects are already gathering

- Relevant Organizations
  - Identify and build relationships with organizations whose members match your Partner profile.
- Corporations
  - Target specific companies that will allow you to make employee presentations and/or that will consider Partner sponsorships.
- Professional Associations and Networks
- Philanthropy Organizations
- Minority Associations and Networks
- Viral Networks
  - Test some "social networking" sites.
- Private Wealth Advisors
  - Be sure they know your SVP is a great option for many of their clients.

PUBLIC RELATIONS
Build your SVP's reputation and generate good will

- Generate positive media coverage in the outlets that your potential prospects read.
- Become the "go to" resource for your local press on issues of philanthropy, social entrepreneurship, and nonprofit capacity building.
- Increase your visibility by participating in philanthropy-related conferences, events and meetings.
- Consider advertising in targeted publications.

WEB MARKETING
Make your message accessible 24/7

- Have a great website that explains the SVP model and that clearly tells interested parties how they can get involved. Many SVPs have short introductory videos on their sites.
- Build "links" between your website and other relevant sites, such as Investee web sites.

> ***"I was referred to the SVP website by someone at the Denver Community Foundation and I thought, 'Just based on what I'm reading here, I'm pretty sure I want to join.' I showed up to an SVP luncheon event and was impressed enough to pay my dues the very next week."***
>
> Andy Fine, Partner, Social Venture Partners Denver

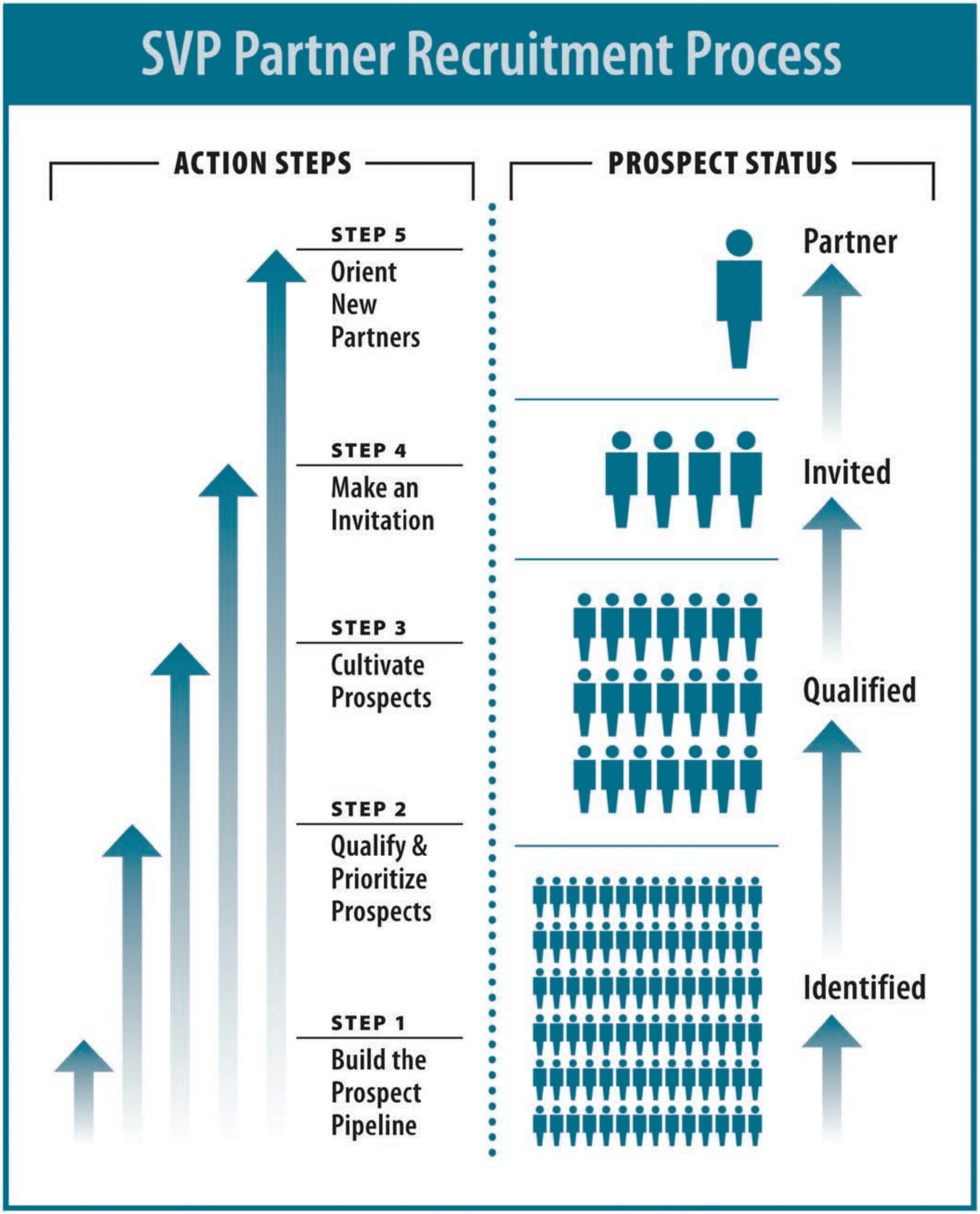
OPPORTUNISTIC PROMOTION
Prepare your Partners to promote your SVP at every opportunity

- Equip your partners with the tools they need to be "constant" ambassadors: language, materials, and confidence.
- Help your partners understand the recruitment process and their role within it.

Of course, events are an essential part of building your profile and attracting new Partners. See Section 2, Step 3 for more on maximizing your events.

SECTION 4

Worksheets, Checklists, and Forms


SVP Partner Recruitment Process
ACTION STEPS
STEP 5
Orient New Partners
STEP 4
Make an Invitation
STEP 3
Cultivate Prospects
STEP 2
Qualify & Prioritize Prospects
STEP 1
Build the Prospect Pipeline
PROSPECT STATUS
Partner
Invited
Qualified
Identified

Worksheet: Recruitment Planning Team

Planning Team Job Description *(Define your core objectives, with the ultimate goal being the development of a recruitment plan)*:

- ☐ Define recruitment goals for SVP
- ☐ Assess SVP readiness for recruitment
- ☐ Engage core group of recruiters
- ☐ Craft a written plan for recruitment
- ☐ Communicate recruitment plan to Partners
- ☐ Other: ____________________
- ☐ Other: ____________________

Lead Staff Person: ____________________

Roles and responsibilities: ____________________

____

____

____

Lead Recruiter (Partner): ____________________

Roles and responsibilities: ____________________

____

____

____

Planning Team Members: ____________________

Roles and responsibilities: ____________________

____

____

____

Worksheet: Pre-Planning Assessment and Goal-Setting

Note: Much of this information can be pulled directly from your Network Health Data form. The remaining information should be discussed in a planning team session.

How many Partners (units) do we currently have? ☐

New in the past 12 months: ☐

Renewed in the past 12 months: ☐

How many partners did not renew in the past 12 months? ☐

How many partners might we expect to resign in the next 12 months? ☐

What can we do to retain them? (discussion)

NEW PARTNER RECRUITMENT GOAL: ☐

Worksheet: Systems and Tools Inventory

MINIMUM ASSETS	CURRENT STATUS			REMEDIATION / NEXT STEP
	In Place	OK for now	Not Ready	
Partners who are equipped to promote your SVP				
A website and basic printed brochure that explains the SVP model and that clearly tells interested parties how to get involved				
Events that will attract new prospects				
A database system for tracking prospects such as Salesforce.com				

IDEAL ASSETS	CURRENT STATUS			REMEDIATION / NEXT STEP
	In Place	OK for now	Not Ready	
Strategic or annual plan for your SVP				
A consistent grantmaking cycle				
Highly engaged Partners				
Opportunities for new Partners to be engaged (e.g., active committees)				
A full set of communications tools (See Section 3 of this manual for the basic recruitment kit)				
Regularly- scheduled educational and social events				
Other:				

Checklist

How to Generate Prospect Referrals (in order of effectiveness)

____ Include prospect referral as part of your Board's job description. Then follow-up with Board members regularly to secure their prospect suggestions.

____ Target specific Partners as strong referral resources and ask them to sit down with you and brainstorm. This works particularly well in a small-group setting.

____ Network with relevant organizations and ask colleagues for prospect ideas.

____ Talk to the leaders at organizations with a shared interest and ask for referrals.

____ Encourage all Partners to make referrals. This is much easier when Partners understand what will happen once the referral is made. They need to understand what their continued role, if any, might be in the recruitment process and how your SVP will approach the prospect.

Building the prospect pipeline

Share this diagram with your Partners and recruiting team to get their creative juices flowing…

WHO DO I KNOW?

Friends

Family

Neighbors

Community Members

Business Associates

Other

WHERE AM I CONNECTED?

Employer

Relevant Organizations and Associations –
Rotary, Chamber, etc.

Other Boards

School

Other

WHO HAS A SHARED INTEREST?

Community Foundation

Other Nonprofits

Wealth Advisors

Other SVPs

Investees

Other

Contact Report Form

Date: ______________________________

Prospect Name(s) ______________________________

SVP Representative(s) ______________________________

Circle one: Phone Call Meeting Email Event Other

Comments: ______________________________

____

____

____

____

NEXT ACTION STEP

Due Date: ______________________________

Assigned to: ______________________________

Activity: ______________________________

Comments: ______________________________

____

____

____

____

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	Regularly review priority prospects.
	Be assigned 10-12 prospects from Salesforce.com and implement SVP Recruitment Process for each of them, including:
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	    Greeting prospects at events
	    Making follow-up calls
	    Inviting prospects to become Partners

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SECTION 5

Benchmarking and Evaluation

Benchmarking and Evaluation

Building the Prospect Pipeline

Determine how many viable prospects you need in the pipeline in order to achieve your recruitment goal. You can do this by evaluating last year's results against the number of prospects you followed up with in some way, or for the time being, estimate that you'll need up to 20 prospects to yield one Partner.

You will also track the number of Partners who regularly refer prospects on your Network Health Data form.

Qualifying and Prioritizing Prospects

Qualifying and prioritizing prospects is one of the most important elements of a successful recruitment program. If you do not already have the following systems in place, implementing them should be an urgent priority.

1. Definition of what makes a prospect "highly qualified" at your SVP.
2. A ranking or coding system for prospect interest levels.
3. Every prospect in your database has a rank or code associated with his/her name.

Once your system is in place, measure your success in qualifying and prioritizing prospects by completing the following assessment:

____ Are you checking your list of "highly qualified," "interested" and "qualified" prospects at least once a month to ensure follow-up is occurring?

____ Does every "open" prospect have a Partner or staff person assigned to them?

____ Are contact assignments occurring in a timely manner? For example, how long does it take for an invitation to be extended when a prospect is deemed ready? Can that process be accelerated?

Benchmarking and Evaluation

Cultivating Prospects

You can track your prospect cultivation progress through Salesforce.com in the following ways:

1. How many prospect "contacts" are being made per month at each level of your prospect coding system?
2. How many prospects are moving up the recruitment spectrum from one stage to the next? (For example, how many prospects were converted from "identified" to "qualified" in the past month?)

It is important to track these elements of your recruitment process so that you can begin to associate them with your results. You might also want to track the number of cultivation hours are being spent by Partners and staff. It is almost certain that you will begin to see that the more contact hours you initiate with prospects, the more Partners you will recruit.

Inviting Prospects to Join

Measure your success at this stage of recruitment in two ways:

Level of activity:

__ how many people are actively making invitations?

__ how many invitations are occurring each month?

Success rate:

Number of New Partners ÷ Number of Invitations = Success Rate

Example: 2 new partners ÷ 3 invitations = 66% success rate

You will also track the number of Partners who regularly close prospects on your Network Health Data form.

Benchmarking and Evaluation

New Partner Orientation

To measure the effectiveness of your orientation program:

1. Track the percentage of Partners who attend an orientation meeting (it should be 100%).
2. Survey your Partners to determine their level of satisfaction with the orientation process.
3. Compare a Partner's level of overall satisfaction in the first year with whether or not they attended an orientation meeting. (SVPI suggests that you survey your Partnership on an annual basis to understand their level of satisfaction with their involvement. You can include orientation questions in this process.)

