

Growth Task Force Board Proposal

9/22/23

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Introduction

Our 2022-2023 Impact Report says it best: Project Redwood has helped nearly one million people improve their lives. Project Redwood started as an ambitious idea pursued by a single class fifteen years ago and expanded to include all GSB classes five years ago.

That expansion decision was taken because Project Redwood is ambitious. We want to deepen our impact. We want to do more for more people who struggle. We made the decision to expand because we recognized it would perpetuate PRW's impact beyond the reach of the founding class. Today, we have begun to experience higher attrition of founding class volunteers simultaneous with our growth, creating the need for more human resources, especially in leadership positions.

Since embarking on "expansion" initiatives to bring alumni from more classes into Project Redwood, we have proven that there ARE alumni outside the founding class that relish becoming volunteers and want to donate. *GSB Alumni Working Together to Fight Poverty is a winning proposition.* However, we need to accelerate our efforts to bring new alumni into the PRW community and to alleviate our overreliance on founding class donors and volunteers. It is clear that PRW's structure and resources are not yet aligned with the strategic importance of this issue.

At the November 2022 Board meeting, the Board held a strategic discussion regarding the need for additional volunteers and leaders to fill current gaps and replace founding class volunteers as they step away. At that meeting, the Board agreed that a Growth Task Force would be created in early 2023 and reaffirmed the importance of bringing new alumni into PRW's community to sustain our mission and organization in April 2023.

Hence, the development of this Growth Plan commenced in spring 2023, with Phase I. The Phase I Growth Task Force included thirteen volunteers, including five from expansion classes (Lisa Nitze, Carol Head, Dave Fletcher, Ross Rosen, Linda Lazor, Amy Minella, Rachel Merrell, Claudia Lindsey, Kirk Renaud, Adriane Armstrong, Brad Smith, Donna Allen, Bill Westwood). Phase II of the Growth Task Force has now completed its work focused Implementation.

Some highlights from our process from March to September:

- We surveyed expansion class members who had not volunteered, recent and current expansion class volunteers and recent and current leaders from all classes to learn about their motivations and experiences
- We also surveyed PRW volunteers who had stepped away from PRW and gained sobering points of view
- We recognized that PRW had relied heavily on the easy familiarity of alumni who have known each other for decades and concluded that building community among new GSB alumni must be intentional

- We learned that recruitment and cultivation programs are necessary to grow PRW, but not sufficient. We will also need to strengthen our culture and build our community
- We recognized that some PRW functions are less attractive to volunteers than others and that we would need to expand staff to fill some human resource needs
- We recognized that attracting more alumni into project Redwood would strengthen our volunteer resources with a spillover effect on development.
- Happily, we recognized that, even without specific plans to recruit and cultivate expansion class alumni, there are MANY GSB alumni who are attracted by PRW's impulse to support others. If the last five years have been proof of concept, we have been successful.

We believe that Project Redwood's goal to become an enduring organization depends on deliberate action to attract more GSB alumni and then cultivate new volunteers and leaders. We believe that financial resources can continue to grow; many founding class members seem inclined to continue financial support. We present this Growth Plan with a determination that, as the problem of pervasive poverty will not be solved in our lifetimes, Project Redwood will continue to grow our impact manyfold.

2. Volunteer Committee Structure and Roles

- a. **New Welcome and Engagement (WE) Committee** (see Appendix Two for detail)

Significant elements of this Growth Plan are:

- Recruitment: Accelerate the rate at which GSB alumni are brought into PRW,
- Cultivation: Intentionally cultivate volunteers and volunteer leaders, and
- Strengthen our Culture: Expand organizational sensitivity to welcome volunteers from all classes

All three objectives fall under the auspices of a new committee: **Welcome and Engagement (WE)**.

Note: This committee name has been previously used to include a subset of the work of this new WE committee. Further, this new WE Committee encompasses work previously done by the GSB Collaboration committee, as virtually all recent GSB Collaboration work has been focused on the first objective above. And the AWARE Committee is similarly folded into WE. The net impact is a reduction in one PRW committee.

Recruitment. There are roughly 30,000 living GSB alumni. PRW's experience is that there is a subset of alumni for whom the work of PRW is appealing. While we have engaged in activities to recruit alumni for years, with this Growth Plan, attracting these alumni will be accelerated and

several new programs will commence. With more resources for current programs and with additional recruitment programs, we can build awareness and more expansively invite alumni to join us to become volunteers, donors or both. A roster of the top twelve priority activities and an additional seven programs are enumerated in Appendix Two.

Cultivation. Intentional cultivation is a wholly new endeavor for PRW aimed at engaging volunteers and leaders in a rewarding and effective environment. These new cultivation efforts are aimed at the intersection of personal and professional, in which alumni feel they contribute to PRW’s mission and belong to the PRW community.

To date, becoming a PRW volunteer has been informal. This worked acceptably when many volunteers were from one class and were acquaintances. It works less fluidly when potential volunteers don’t have long standing familiarity.

Past volunteers who are not active currently from the classes of 1978 to 2018 were surveyed to better understand why they stepped away from PRW. The focus of new cultivation efforts derives from our learnings from these survey responses.

- Community relationship building - more ways to become connected with other GSB alumni
- Connection to PRW’s mission - rewarding and stimulating interaction with grantee organizations
- Opportunities for “bite-sized” engagement - assignments with lower time demands

In addition, respondents noted that PRW is overly bureaucratic, including the number of meetings and other tasks. (See Appendix Three for a summary of survey responses.)

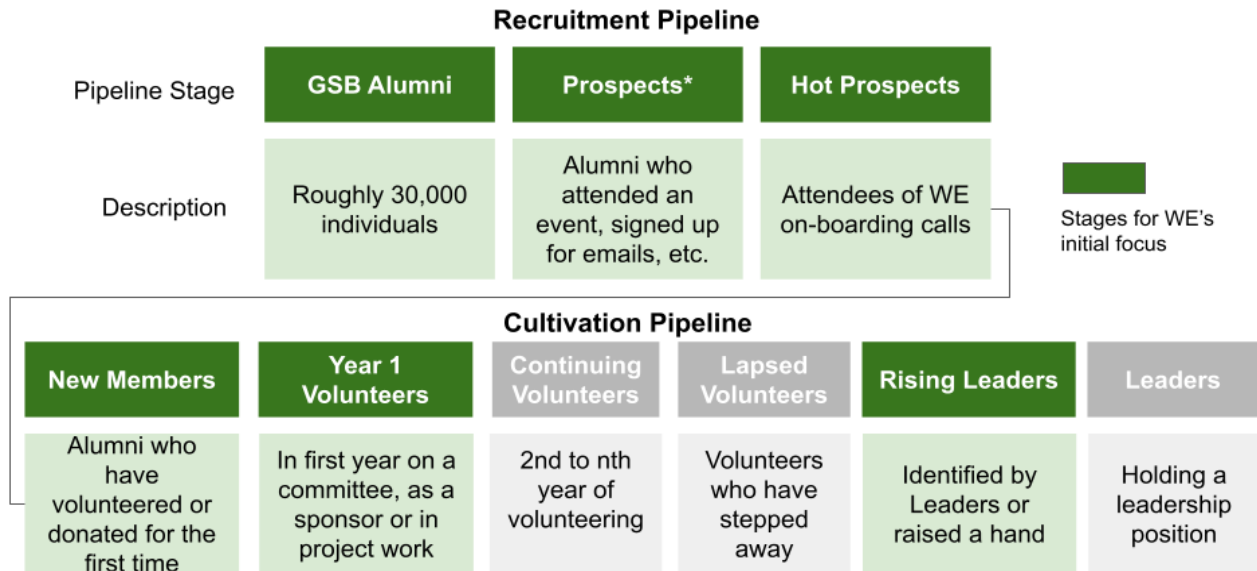
With the new WE Committee, we can be more agile in matching new volunteers’ interests and talents with opportunities. We can support Year 1 Volunteers so that they more quickly understand PRW and gain a sense of belonging. We can, similarly, engage with volunteers over time as their interests and availability shift. We can collaborate with the People Committee and committee co-chairs to identify new leaders and place them in opportunities. Top priority and next priority cultivation initiatives are outlined in Appendix Two.

Strengthening Our Culture. All alumni, regardless of graduating class, are equally important and valued in PRW. And at the same time, we recognize that longstanding familiarity among the founding class has unintentionally had a modest chilling effect for alumni from other class years. To stamp out class year distinctions, all volunteers will be asked to recognize and adhere to new ways of interacting that will be more welcoming to all. Appendix Two describes many specific adjustments to our operations.

The graphic below illustrates the pipeline stages of recruiting and cultivating our members, volunteers, from alumni with no awareness of PRW through to PRW leadership. While some

alumni may certainly skip steps in the pipeline, these are the stages of progress through the process that will be tracked via Zoho.

Below is a graphic showing the full alumni experience through Recruitment and Cultivation.



*PRW will proactively add alumni names to Zoho which are called "Leads" and receive only limited, specific outreach. These Leads are not yet Prospects.

b. Adjustment to Community of Grantees and Sponsors

Our mission to support organizations that help individuals improve their standard of living is the heart and soul of the attraction of alumni to our work. Experience has shown that there are many more volunteers and leaders who are attracted to our Mission Committees (GRC, EIC, COGS and US Poverty Task Force) than the Growth Committees (Development, WE and CMT).

Therefore, to continue to strengthen the number of volunteers, we call on the Committee of Grantees and Sponsors (COGS), which "owns" PRW's relationship with grantees. One important COGS-related program within WE is the creation of virtual Grantee Spotlight events. These periodic events would feature one or two grantees and be open to all GSB alumni and PRW Members. While WE volunteers and staff would plan and manage these events, they will rely on the knowledge and judgment of COGS in identifying appropriate grantees to feature and in supporting the events. While this places a burden on some grantees, based on COGS' informed judgment in their selection, we can identify the grantee leaders who may relish the opportunity to become better known. We believe these new virtual Grantee Spotlights, advertised to all GSB alumni, will have a positive impact on PRW recruitment

c. People Committee Involvement

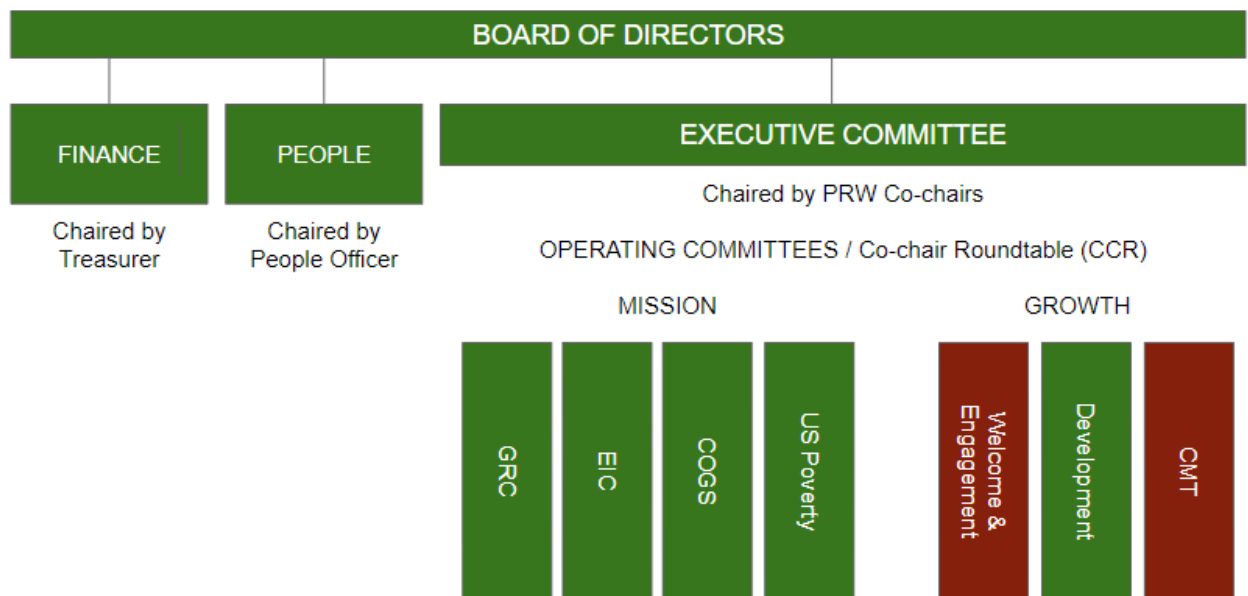
The People Committee of the Board will partner closely with the new WE Committee as well as operating and Board committee co-chairs to accomplish their charge to present the Board with an annual slate of leaders. This three-way collaboration will include:

- identifying new rising leaders
- updating rising leaders’ interests and activities
- identifying next opportunities for rising leaders
- planning leadership succession

The new WE Committee will be responsible for working with operating and Board committee co-chairs to fulfill PRW’s needs for new committee members and other volunteers. The People Committee will be responsible for collaborating with both groups to fulfill PRW’s needs for new leaders (Board, Executive Committee, operating and Board committee co-chairs) and will be responsible for cultivating those leaders’ engagement and involvement.

d. Updated Volunteer Organization Chart

The chart below is a schematic of how our PRW volunteers will be organized. We note that there are three types of committees: Committees of the Board, and two types of Operating Committees, those that are responsible for Mission and for Growth. We have learned that the committee co-chair model works very well for our volunteers; with shared responsibility, the committee management workload is lighter and co-chairs can spell each other as one takes time off for travel or other needs. Each committee, of every type, will ideally have two co-chairs.



3. Staff Recommendations

a. Two Proposed New Staff

PRW's current organizational model – two volunteer co-chairs leading operating and Board committees with the assistance of shared staff support – has many virtues but does not excel at:

- integrating needed specialized professional skills consistently (e.g, marketing expertise, project management)
- accelerating series of activities throughout the year (e.g., frequent member recruitment and engagement opportunities)
- cultivating member relationships across time (e.g., with potential high donors or rising volunteer leaders)

The Growth Task Force has analyzed PRW's needs and updated organizational models for two committees. These models do not replace PRW's current model. Instead, they are intended to supplement the core model, providing flexibility where it is needed.

- New Welcome & Engagement Committee - The work that will be undertaken by this committee represents a significant expansion of previous growth-oriented initiatives and the addition of many new activities, adding up to a consistent and continuous level of effort and relationship building year round that will require dedicated staff support. Our implementation plan includes hiring a 25-hour [Welcome and Engagement] Program Manager who will report to the Director of Operations with a dotted line to the WE co-chairs. This person will oversee PRW's efforts to recruit alumni, cultivate volunteers and build relationships. Responsibilities will include:
 - Alumni recruitment and onboarding
 - Member cultivation and volunteer placement
 - Alumni and volunteer community building
 - Alumni and volunteer data management(see appendix Four for position description)
- CMT - The initiation of the new Welcome and Engagement Committee and its acceleration of recruitment and cultivation activities will cause a substantial increase in demand for CMT's support. Last month, Matt Minella started as a short-term volunteer with PRW and has already added marketing communications and project management skills and capacity. The need for these skills and expanded capacity will be long-term as CMT is called upon to support two primary clients, WE and Development. We plan to proactively manage Matt's involvement with PRW as a pilot to learn what works best and, at the end his volunteering, hire or contract with a 25-hour [Marketing Communications] Project Manager, reporting to the Director of Operations with a dotted line to the CMT co-chairs. (see Appendix Four for position description)

b. Development Committee Implications

Development expertise and experience as well as project management are specialized professional skills critical to building upon PRW's solid base of development fundamentals and results achieved in the last few years. We are fortunate that PRW's Director of Operations has this background and these skill sets. Matt Mascioli (GSB '17) has agreed to become the co-chair of the Development Committee beginning in January 2024 and, in partnership with PRW's Director of Operations, will co-lead the calendar year campaign. Matt has a development background and significant non-profit leadership experience.

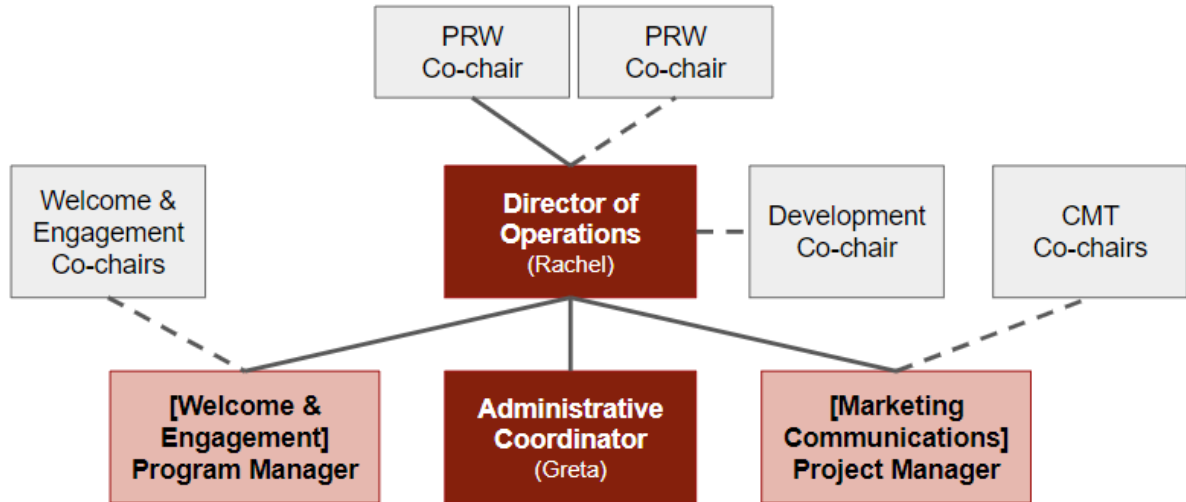
c. Director of Operations Implications

A plan to relieve the Director of Operations' administrative burden and shift more of her time to Development by increasing the hours of PRW's Administrative Coordinator is already underway. Further steps enabling the Director to allocate time to development will need to be assessed as the [Welcome and Engagement] Program Manager and the [Marketing Communications] Project Manager come online. Both positions hold the potential to relieve the workload of the Director of Operations further (e.g., organizing PRW's Annual Meeting) after 3-4 months of acclimation and training.

In summary, this plan will add two new 25-hour staff positions

- Hiring a [Welcome and Engagement] Program Manager in tandem with the new WE Committee formation in late 2023/early 2024
- Hiring or contracting with a [Marketing Communications] Project Manager at the end of the current CMT internship. This timing is currently uncertain.

d. Proposed New Staff Organization Chart



4. Target Growth Metrics

As we implement this Growth Plan, it’s important to establish our expectations regarding success. Below are a select few metrics that are key indicators of our progress. All metrics are fiscal year, other than Development.

Responsible Committee	Key Metric	Annual Goal
Development	1. Annual donations (Total Calendar Year Campaign)	CY 2022 - \$1.156M (actual) CY 2023 - \$1.25M CY 2024 - \$1.45M CY 2025 - \$1.65M
	2. Percent of annual donations from expansion classes (Total Calendar Year Campaign)	CY 2022 - 9% (actual) CY 2023 - 9% CY 2024 - 28% CY 2025 - 37%
WE - Recruitment	1. Number of GSB Alumni Prospects	7/1/23 – 538 (actual) 7/1/24 - 650 7/1/25 - 850 7/1/26 – 1,100
	2. Percent of New Prospects who become Members (“New Prospects” are net change in alumni in Zoho in preceding 12 months)	7/1/23 – 18% (actual) 7/1/24 – 23% 7/1/25 – 28% 7/1/26 – 30%
WE - Cultivation	1. Percent Volunteers from expansion classes (Volunteers: committee members, committee co-chairs, Board members, sponsors, EIC liaisons)	7/1/23 - 47% (actual) 7/1/24 - 60% 7/1/25 - 70% 7/1/26 - 80%
	2. Percent Leaders (co-chairs and Board) from expansion classes	7/1/23 - 35% (actual) 7/1/24 - 40% 7/1/25 - 55% 7/1/26 - 70%

5. Budget Implications

This plan to grow PRW's base of Members, Donors, Volunteers and Leaders will increase our operating expenses starting in the second half of this fiscal year. Yet, PRW's dedication of our financial resources to support our Mission to fight poverty will remain well within general non-profit ratio guidelines.

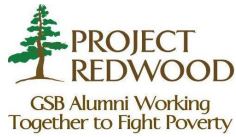
The expense related to carrying out this plan is largely composed of compensation for the two new 25-hour staff positions, \$42,000-\$50,000 for the [Welcome and Engagement] Program Manager and \$40,000-\$45,000 for the [Marketing Communications] Project Manager. In addition, we estimate \$20-\$30,000 annually in non-personnel expenses for additional regional meetings, advertising, etc.

The Finance Committee has prepared a pro forma FY '23/'24 budget including these expenses which incorporates when they are projected to begin to be incurred and their impact on the current fiscal year budget. These additions increase total expenses from 15% to 22% of revenues. (see Appendix Five.)

Based on these pro forma numbers, we have also calculated PRW's Operating Expense Ratio, a measure commonly used to assess a non-profit's overhead. This ratio includes both Administrative and Fundraising expenses as a percent of total expenses. It excludes the expense of grants, the proportion of staff compensation for mission-related activities and mission-related direct expenses. PRW's Operating Expense Ratio is 20%, leaving 80% of our expenses dedicated to our Mission to fight poverty. This is up from ratios of 14% and 86% respectively in the prior year.

There is no one-size-fits-all answer to what percentage of expenses used for fundraising and administration is considered acceptable for non-profit organizations because acceptable percentages can vary widely depending on the nature of the organization, its mission, and its specific circumstances. However, there are some general guidelines and industry standards that can provide context:

- The 65/35 Rule: Some experts suggest the "65/35 rule," which implies that a well-managed non-profit should spend no more than 35% of its budget on overhead (including both administrative and fundraising expenses). This guideline suggests that at least 65% of the organization's budget should be directed toward program-related expenses and the mission.
- Charity Navigator Standards: Charity Navigator, a prominent non-profit watchdog organization, recommends that non-profits spend at least two-thirds (66.7%) of their expenses on program activities. They also provide a rating system that evaluates non-profits based on their financial efficiency, accountability, and transparency. Non-profits' average program expense percentages are calculated over their three most recent fiscal years and then assigned a numeric score based on an established scale.



As a newly independent 501(c)3, PRW will not be evaluated on this basis in the first years. However, if we were, we would be reported to have a healthy 80% of our budget dedicated to our Mission.

6. Implementation (see detail in Appendix Six)

Assuming Board approval of this Growth Plan, we believe that several early and important implementation tasks can be completed by existing leadership in the fourth quarter of 2023. Then Project Redwood will be ready to commence the many WE Committee programs at the start of calendar year 2024, with new staff and WE Committee leadership.

The Executive Committee will oversee implementation of this plan, with the Board's review and oversight annually.

7. Conclusion

Our Growth Task Force charge was to recommend a plan that would propel Project Redwood growth long into the future. We believe that we have created an organization that does good in the world, demonstrates the resolve and interests of GSB alumni and has the capacity to continue to grow financial support for grantees many fold. We don't know where PRW's eventual impact ceiling is, but we believe that we are not yet close to it.

To achieve accelerated growth, there are programs that need to be undertaken, resources that need to be committed and cultural change that needs to be undertaken, but all of this can be achieved. This plan articulates an organization-wide perspective and provides the methods and steps to systematically grow PRW's membership - the source of our funding - and attract and retain volunteers and leaders - the guarantors of sustained high quality work. This plan has the unanimous endorsement of the Phase II Growth Task Force.

Risks are inherent in any plan for change. The Board's review of PRW's progress against the plan and its metrics is recommended in the proposal annually. The risk of not implementing the plan is continued overreliance on founding class volunteers and leaders that constrains our ability to fulfill our mission and generates organizational and operational instability.

We recommend this plan to the PRW Board of Directors and seek your approval. We believe strongly in the need to take a new, more comprehensive and methodical approach to Growth at this stage of PRW's development to ensure that our unique community of GSB alumni working together to fight poverty thrives.

Appendixes

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2. Welcome and Engagement Committee Description
3. Research Regarding Volunteer Attrition
4. Position descriptions
 - a. Program Manager
 - b. Marketing/Communications
5. Budgets
6. Implementation Plan

Appendix One: Clarification of Terms

GSB Alumni – graduates of the MBA, SEP, MSx or PhD programs. We define this as does the GSB and do not include graduates of various certificate programs.

Prospects - GSB Alumni or relatives who show an interest in PRW by attending an event, signing up on the website, attending an onboarding call or in some way reached out to PRW but is not yet a member.

Prospects are not: Non GSB Alumni / relatives or GSB Alumni who did not reach out to PRW, Prospects who asked to be removed from our email list, or a GSB Alumni or relative who is a Member.

Members - Members are GSB Alumni / relatives who have donated at any level or volunteered for PRW in a non-financial way in the previous or current fiscal year.

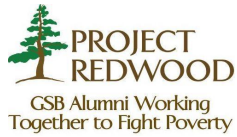
Members are not: Former Members who have not donated or volunteered in the prior 12 months or individuals who are still Prospects. A volunteer who is not GSB-related is not a member.

For KPIs this Member number will be calculated as of the end of the fiscal year, July 1.

Voting Members - Members who have donated a minimum of \$250 in the prior 12 months and have the right to vote on the annual slate of grantee applicants.

Donors - Members who have contributed to PRW at any level in the current or previous calendar year.

As the number of PRW's Members grows, we do not expect the need for volunteers to increase at the same rate. The result will be a growing proportion of PRW's membership being composed of Members who are Donors.



Volunteers - Anyone who has volunteered to help PRW in some function in the prior 12 months. Volunteers can also be non-GSB Alumni who give time to help PRW in some way but are not paid staff.

Volunteers are not: Paid PRW Staf. Prospects. GSB Alumni who did not reach out to PRW or Prospects who asked to be removed from our email list.

Year 1 Volunteers - Volunteers in their first year of helping PRW in some non-financial way .

Year 1 Volunteers are not: Volunteers in their 2nd year or more of helping PRW in some non-financial way.

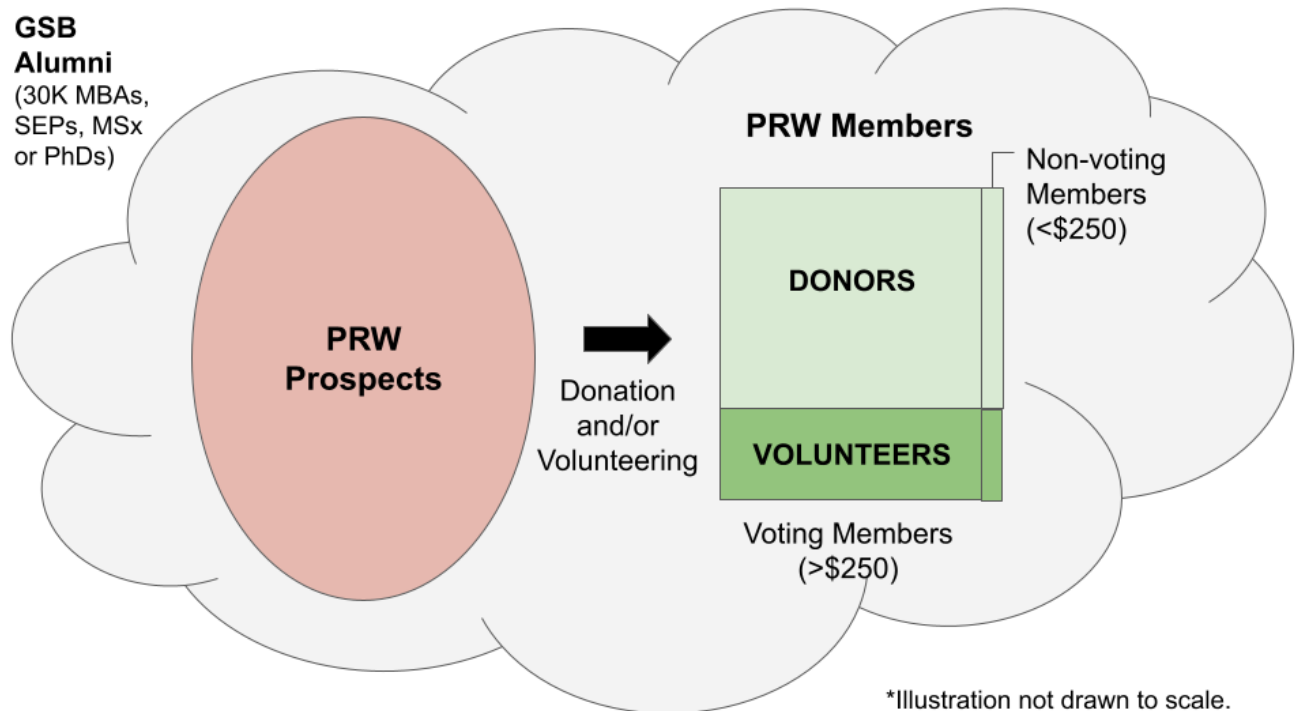
Rising Leaders - Volunteers who are Members and, most commonly, have been Year 1 Volunteers and preferably more. Rising Leaders have demonstrated a strong commitment to PRW, including being donors, have perhaps raised their hand to volunteer as a leader, and have the support of a committee co-chair for this designation.

Sponsors – GSB Alumni who successfully bring forward a non-profit for PRW support and funding. Sponsors are PRW Volunteers.

Mentors - Experienced Volunteers who are interested in supporting Year 1 volunteers. Every committee with Year 1 Volunteer committee members will designate a Mentor for those new members and the Sponsor Training team will designate Mentors for new Sponsors.

Note: Development uses delineated donor giving levels for their work. These categories and their titles, including Visionary, Major Donor, Partner, Associate and Contributor, are used exclusively for development. "Member" was previously the name of a giving level category, but has been dropped from use in development.

The graphic below illustrates the relationships between several of these terms.



Appendix Two: New Welcome and Engagement (WE) Committee Description

Three-fold WE Committee Charge:

1. **Recruitment:** *Increase the number of GSB alumni that become PRW Prospects, initially focusing on the classes of 1981 to 2001. This includes:*
 - a. *building awareness*
 - b. *inviting alumni to opt in*
 - c. *inviting them to an onboarding call.*

2. **Cultivation:** *Attract and retain active volunteers* and leaders, meeting PRW's needs for human capital.*
 - a. *identifying PRW's volunteer needs*
 - b. *placing volunteers in opportunities*
 - c. *ensuring new volunteers are supported*
 - d. *building community among volunteers*
 - e. *monitoring volunteer interests and satisfaction*
 - f. *identifying and supporting rising leaders (in collaboration with the People Committee)*

*Volunteers include committee members, sponsors and those undertaking projects

3. **Culture: Strengthening our Culture** to be welcoming to all alumni regardless of class year.

WE Committee Programs - Recruitment

The new WE Committee at inception will target twelve Priority One programs listed below. For purposes of this committee plan and budget, the top priority programs are assumed to be implemented in FY 2023/24. Ideally all twenty programs are implemented by the end of calendar 2024.

Top Priority Recruitment Programs

Programs in *italics* are already underway. Programs which also benefit Cultivation work are **bolded**.

1. *Onboarding of newly interested alumni. Both individual onboarding and scheduled, multi-alumni sessions. develop agenda and materials for these sessions.*
2. *Growth Ambassador Program*
3. *25th Reunions*
4. *Fall Reunions*
5. **GSB magazine full page designed notice**
6. ***PRW annual in-person meeting***
7. CSI-related programs. First step for this program is to learn more regarding CSI alumni, then make go/no go decision
 1. Description of PRW for CSI bulletin sent to CSI Champions
 2. Reach out to CSI alumni with an introductory PRW message
 3. CSI Zoom “Fireside Chat”
8. **Pursue GSB alumni magazine article**
9. Pursue SEP Alumni but first need more understanding (Notes: First step is to understand more in order to appeal to SEP Alumni Group, which comprises 25% of all GSB alumni. Their age range and career stage is in PRW’s target range. However, current classes are mid-career and on their way up the ladder, so initially are more likely to be donors than volunteers.)
10. ***PRW’s Leadership Roundtable***
11. **Grantee Spotlight Virtual events**
12. ***Regional Events (in partnership with city GSB alumni chapters)***
13. *Obtain notices in Hirshberg’s new GSB alumni monthly newsletter*

Lower Priority WE Tactics *The new WE will initiate these programs as capacity expands with new staff, ideally by the end of 2024.*

14. Manage regular branding and call to action notices in GSB magazine Class Notes
15. Publish notices in the GSB Alumni LinkedIn page (27k members)
16. **Redwood Philanthropy Circle**
17. Outreach to alumni who served as ACT volunteers
18. PRW volunteers join GSB Groups (e.g., Women, Latino) and regularly place notices
19. **Small in-person in-home gatherings**
20. **Update and manage PRW Groups page**

WE Committee Programs – Cultivation

In its work on Cultivation, the new WE Committee will first target the top priority programs listed below. Since Cultivation is a function that has not been undertaken methodically by PRW before, the Committee will need to ensure that these programs are each treated as pilots with learnings from each guiding the way forward.

Top Priority Cultivation Programs

(Programs that benefit both Recruitment and Cultivation are not repeated)

1. Community Building and Connection to Mission (for Volunteers/Leaders and, in some cases, Members)
 - a. Annual survey akin to an NPS (net promoter score) survey to assess progress and gather feedback on experiences
 - b. Social engagement opportunities such as:
 - i. Local/in-person informal social gatherings for lunch or happy hour
 - ii. Community invitation to read/discuss online an article or podcast
 - iii. Informal local get-togethers for new and other volunteers in selected geographies
 - c. Pilot ways to connect the PRW community more closely to grantmaking; possible programs include:
 - i. Annual review of EIC findings and grantee impact; possibly a presentation followed by Q&A
 - ii. Host an online discussion forum for members during the GRC member vote; provide an overview of grantees on the slate they are voting on and an opportunity for smaller breakout discussion groups
2. Year 1 Volunteers
 - a. PRW 101 orientations for new volunteers, going beyond onboarding content; possible distribution of written materials, small group discussion sessions or one-on-ones
 - b. Check-in program to gauge Year 1 Volunteers' satisfaction and build relationships (e.g., twice in the year)
 - c. Mentor program with experienced volunteer in the same assignment (e.g., a mentor designated on each committee with Year 1 Volunteer members)
 - d.
3. Rising Leaders
 - a. Check-in program to monitor shifting personal interests and availability
 - b. Offer Rising Leaders opportunities to broaden their engagement in PRW (e.g., attending CCR and Board meetings, short term project)
4. Cultivation Functionality
 - a. Position the WE Committee as a repository of bite-sized projects/one-time tasks and place volunteers who do not wish to join a standing committee

- b. Collaboration with committee co-chairs to identify, invite and attract and cultivate new committee members
- c. Collaboration with People Committee and committee co-chairs to identify and cultivate Rising Leaders
- d. Establish a system in Zoho that enables tracking of volunteer profiles and engagement; review/update Zoho flags

Lower Priority Cultivation Programs

1. More formally develop a program of “bite-sized” volunteer opportunities to fit more volunteers’ life situations and as an on-ramp to committee engagement; possibilities include:
 - a. Polling committees to gather “bite-sized” opportunities (e.g., leading a Cultivation social event)
 - b. Polling volunteers about their interest in sponsorship
 - c. Providing opportunities for new members to sit in as guests or meet offline with someone on the committee.
 - d. Inventorying the names of Prospects that are interested in shorter assignments
2. Offer online grantee advising sessions for grantees and sponsors requesting it as “bite-sized” engagement for new members
3. Develop plan to reach out periodically to recruit alumni who are in Zoho as Prospects, lapsed Volunteers or members who are not new to PRW

WE Committee Activities – Strengthening Our Culture

Most, if not all, of the Recruitment and Cultivation programs will strengthen our culture and propel PRW to become a truly multi-class organization which is more welcoming to all, adopts more community building practices and provides a more rewarding experience. In addition, the WE Committee will oversee programs that specifically target culture change.

Start-up Culture Strengthening Programs

1. Define PRW values explicitly and assess PRW’s practices against them
2. Work with the CCR to develop and implement a variety of community building practices, including good committee and meeting practices; examples include starting meetings with a check-in, using chat (e.g. name and where from) in large meetings, inviting each person to briefly share (e.g., how they are doing or short answer to a question)
3. Work with COGS to engage sponsors in PRW more broadly through periodic meetings
4. Create an accessible member roster with photos and brief optional bios

Ongoing Culture Strengthening Programs

1. Periodically work with the CCR to exchange information about successful leader practices

2. Routinely invite the broadest scope of the PRW community to events that they might find interesting and build into the plan additional outreach to New Members, Prospects and others that are less connected to PRW's community; include a special welcome in meetings to new attendees
3. Work with the EC to brainstorm and implement a variety of practices with PRW's leaders that encourage camaraderie, promote participation and convey PRW's appreciation

WE Committee Operating Description

Committee Structure

- Two volunteer committee co-chairs (ideally from expansion classes).
- Volunteer Committee members' role
 - Drives forward their specific program(s).
 - Planning and limited execution.
 - Leads on all direct interaction with peer alumni

The WE Committee at launch will be 1980 heavy. It is an explicit goal (owned by the Cultivation Committee and two WE co-chairs) to transition to expansion-heavy volunteers by the end of calendar 2024.
- Each WE program will have one volunteer who is responsible for implementing it, with staff support. Volunteer committee members will often take on more than one program.
- Potential initial committee members and their programs
 - Amy Minella and Rick Agresta – Manage onboarding calls
 - Martha Clark – continue to own Ambassador program
 - Carol Head – GSB magazine notices and GSB alumni magazine editorial feature (I can take one more, once I step down from Development leadership in January)
 - Dave Fletcher, Donna Allen, Jorian Wilkins, and Adriane Armstrong – continue their relationship with GSB staff. (It's important to maintain controlled access to GSB staff.) Own several GSB and CSI-related programs.
 - Ken Inadomi – continue to own PRW's Leadership Roundtable (derived from Development Committee)
 - Coordinate with COGS – own Grantee Spotlight Virtual events
 - Dave and Donna - In-person GSB class reunions, with local chapters (Fall and 25th reunion), with staff support
 - PRW Co-chairs? – PRW Annual in-person meeting, with staff event support
 - Rick Agresta - Regional events

- Program Manager Staff Role
 - Working with volunteers to expand program descriptions and develop operating plans/timelines for each
 - Tracking overall progress of programs. Solving problems as needed. Recognizing “stalls”
 - Setting up and tracking meetings
 - Events (reunions and other) - Once event time and place is established, all operational event execution (e.g., sending and tracking invitations, working with CMT on presentations, arranging for food/beverage, budget tracking)
 - Copied or sits in on communications with alumni
 - Other support as needed by volunteer

Resources Needed for WE Committee Success and PRW Growth

Effective marketing and communications are critical to the success of the WE Committee work, particularly for Recruitment. Discussion and clarification of the working relationship between CMT and WE will be an important step in the WE Committee launch.

Some WE Committee programs will also require expenditures. In addition to the cost of new staff support, a budget of \$20,000-30,000 has been estimated covering costs for regional GSB alumni events, advertising and involvement in campus reunions

Appendix Three: Research on Volunteer Attrition and Views

A March PRW volunteer survey was conducted to guide our growth planning 2023.

What are the primary motivations that drive people to volunteer? To lead?

We have a good product.

Social impact and working with GSB alumni drive both interest and satisfaction

The product doesn't sell itself.
take

Personal relationships compel people to volunteer and Leadership roles

*Early career alumni are harder
some
to attract.*

Time availability draws people to volunteer and leads to leave leadership roles.

Another survey was conducted in July 2023.

We have surveyed 39 past volunteers and sponsors who are not active currently as volunteers. These include members of classes from 1978 to 2018. Of these, 13 responded.

Reasons for Discontinuing Volunteering

- The most significant reason was the demands of work, which do not allow for any significant volunteer work at this time.
- The second most significant reason was a variety of personal demands – family-related challenges, community involvement, other Board responsibilities, other non-profit work, etc.
- A third reason stated by several respondents was the overly bureaucratic nature of PRW – that is, the formality of the application process, the demands on the sponsor, the number of meetings involved, and other tasks not directly related to supporting a non-profit organization.
- Though it is now being addressed directly, respondents noted that the absence of a strong thrust on U.S.-based organizations was a deterrent to volunteering.
- When volunteering did not include direct contact with recipient organizations, it was less rewarding and stimulating. Several respondents who now have direct contact with non-profits as volunteers noted how valuable that direct contact is.
- Finally, the absence of straightforward ways to become more connected with classmates or other GSB grads was cited as a dissatisfier for several.

Appendix Four: Position Descriptions

Title: [Welcome and Engagement] Program Manager

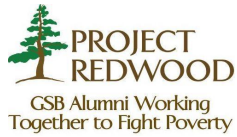
Position: 25 hours initially with the potential to expand

Start Date: ~January 2024

Location: Virtual

Program Manager, [Welcome and Engagement]

Reporting to the Operations Director, the [Welcome and Engagement] Program Manager manages initiatives that expand and support the community of Stanford Graduate School of Business (GSB) alumni that are interested and involved in PRW. Working closely with the Welcome & Engagement Committee, this manager will implement programs and initiatives to attract and retain alumni and volunteers, including recruitment of new Stanford GSB alumni, onboarding, volunteer cultivation and placement, and on-going community building.



This is a new role in a fast growing volunteer-led organization. In 2023, the PRW community of Stanford GSB alumni is ___ people, of which ___ are current volunteers in mission-facing and growth-related roles.

Responsibilities

Alumni Recruitment and Onboarding

Work closely with the Welcome & Engagement Committee to implement a strategy to meet annual recruitment goals, with an emphasis on raising awareness of PRW among Stanford GSB alumni through marketing, and inviting alumni to connect with our mission through grantee events. Facilitate effective onboarding invitations and compelling articulation of PRW's mission, values and volunteer opportunities.

Volunteer Cultivation and Placement

Work closely with the Welcome & Engagement Committee to implement a strategy to achieve goals and ensure all committees and projects have the volunteers they need to deliver effectively. Collaborate to develop a healthy pipeline of rising leaders to fill leadership positions. Coordinate the placement of volunteers into committee and project opportunities that align with their interests and PRW's needs, filling openings as they arise in a timely manner. Regularly communicate and build relationships with volunteers to ensure placement is a good fit for individuals skills and goals.

Alumni and Volunteer Community Building

Work closely with the Welcome and Engagement Committee to implement a year-long alumni and volunteer community building strategy that fosters connectedness, leading to a deepened commitment as champions who open doors to more alumni and volunteers. Coordinate in-person events that bring PRW's community together, including opportunities such as the Annual Meeting and local social events. Oversee recognition and appreciation.

Alumni and Volunteer Data Management

[Manage or Maintain(?)] the alumni and volunteer databases, maintaining accurate records in Zoho and Google Sheets related to background information, program engagement and volunteer interests. Monitor alumni and volunteer feedback via an annual survey to inform initiatives and events.

Skills and Experience

- A 3-5 year proven track record in volunteer recruitment, community building, project management and group facilitation

- Motivated to connect people and our cause of fighting poverty.
- Strong relationship development and management to ensure consistent productive outreach in a virtual environment
- Ability to handle multiple projects in a changing environment, including a.) developing project scope, operating plans and timelines, b.) identifying and overcoming obstacles and c.) meeting deadlines
- Collaboration skills, including the ability to structure group processes, align with supporting functions (e.g., marketing communications), hold others accountable productively and partner effectively
- Excellent written, verbal, and interpersonal communication skills
- A 4-year college degree
- Excellent PC application skills. Experience with Zoho or similar CRM preferred

Title: [Marketing Communications] Project Manager

Position: 25 hours initially with the potential to expand

Start Date: TBD

Location: Virtual

Project Manager, [Marketing Communications]

Reporting to the Operations Director and with a dotted line reporting relationship to the Communications, Marketing & Technology (CMT*) Committee co-chairs, the [Marketing Communications] Project Manager will support the implementation of communications plans for multiple Board and operating committees through planning, creative ideation, asset development, execution, and engagement tracking. This is a new role in a fast growing volunteer-led organization.

*CMT is responsible for communicating professionally with multiple audiences (internal and external), marketing Project Redwood's brand, and managing PRW's technology resources.

Responsibilities

Content Creation

Provide content creation, graphic design support, proofing/editing, and coordination for a variety of marketing and communications deliverables. Undertake email marketing efforts including content development, list coordination, and engagement tracking.

Project Management

Assess the effectiveness of and suggest improvements to the current project management system. Manage the intake and tracking system to ensure that design and production requests are handled efficiently and effectively. Work closely with the Development Committee and the Welcome and Engagement Committee, CMT's primary internal clients, to achieve goals. Assist in developing a marketing communications calendar that ensures all PRW committees' projects can be delivered effectively.

Assistance with CMT Planning Initiatives

At the direction of CMT's co-chairs, participate in important planned projects to continue to strengthen PRW's marketing and communications, such as: updating and documenting the CMT engagement model, developing and communicating an intake, prioritization & triage process, and maintaining inventory and access to materials (e.g., presentations, photos).

Skills and Experience

- 5+ years of experience in marketing and communications or roles involving content strategy, marketing for fundraising and campaigns, and project management
- Motivated by our cause of fighting poverty
- Experienced in writing, curating, editing, and publishing stories aligning with our mission, designing and producing print and digital material and visual design for program-specific projects. Excellent copywriting and editing skills as well as design and graphics skills.
- Strong project management skills coupled with the ability work cross-functionally with multiple internal clients
- Knowledge of event production and how communications can factor into a pre- and post-event plan
- Strong relationship development and management to ensure consistent productive outreach in a virtual environment
- Excellent written, verbal, and interpersonal communication skills

- A 4-year college degree in a related field
- Excellent PC application skills. Experience with Zoho or similar CRM preferred

Appendix Five: Pro Forma Budget

Project Redwood 2022-23 Budget Update: Calendar & Fiscal Years					
		Stub	Fiscal 2024		
		2023H1	2023H2	2024H1	2024H2
		1/1/23-6/30/23 <i>Updated 9/13/23 Estimated</i>	7/1/23-12/31/23 <i>Updated 9/13/23</i>	1/1/24-6/30/24 <i>Updated 9/13/23</i>	7/1/24-6/30/24 <i>Updated 9/13/23</i>
Total Revenue		\$176,009	\$1,073,991	\$204,170	\$1,245,830
Expenses	Grants - Standard Cycle	\$850,002	\$0	\$900,000	\$0
	Grants - Rapid Response	\$0	\$0	\$0	\$0
	Payroll expense	\$63,175	\$67,050	\$112,162	\$124,706
	Expenses PRW direct	\$13,446	\$17,920	\$30,525	\$26,646
	Tides Admin fee	\$8,000	\$0	\$0	\$0
	Other Tides fees	\$0	\$0	\$0	\$0
	Click & Pledge fees	\$460	\$6,981	\$1,327	\$8,098
	Stock sale fees/gain or loss	\$0	\$0	\$0	\$0
	Total Operating Expense	\$85,081	\$91,950	\$144,014	\$159,450
	Total Grants + Expenses	\$935,083	\$91,950	\$1,044,014	\$159,450
Net Cash Flow (NCF)		-\$759,074	\$982,041	-\$839,844	\$1,086,380
Total Fund Balance Period End		\$188,343	\$1,170,384	\$330,540	\$1,416,920

Appendix Six: Implementation Plan Detail

	Resp. Comm.	Oct 23	Nov 23	Dec 23	Jan 24	Feb 24	Mar 24	Apr 24	May 24	Jun 24	Later
Launch Growth Plan											
Present growth plan to current volunteers	Exec Comm? Two Growth team leaders?										
Recruit WE volunteer committee chairs (Ideally Expansion)	People Committee?										

Staffing													
Recruit new program staff to support WE	People Committee												
Recruit MarCom staff to support PRW (when needed, per M. Minella)	People Committee	?											
Review / update understanding with two current staff	People Committee												
New Welcome & Engagement Committee													
Confirm current volunteers will continue	WE Committee Chairs												
Recruit WE volunteers for specific functions.	WE Committee Chairs												
Create Year 1 Volunteer PRW 101 curriculum and other onboarding and training materials	WE Committee Chairs												
Establish committee meeting rhythm, prioritization among 3 areas. Initiate new prioritized programs.	WE Committee Chairs												
Review community building programs with current volunteers	WE Committee Chairs												
Develop process for tracking Rising Leaders	WE and People Committees												

Implement baseline member survey	WE Committee Chairs												
Commence implementation of lower priority programs	WE Committee Chairs												
Board Oversight													
Annual review of progress against plan and metrics	Executive and WE Committees												