



## 2017 Volunteer Interest Survey

Dear Friends,

One of the greatest strengths and resources of Philanthropy Southwest has always been the volunteer support of members. Annually, approximately 100 of our members serve on the Board of Directors or on a committee. Their service enables us to operate with a small staff, while still offering a top-notch annual conference and dozens of educational programs throughout the year.

**We warmly invite you to join us as a volunteer in 2017!** *Here are two ways you can become involved:*

1. **Committee Volunteer:** In each of the committees shown below, we have included information on the anticipated frequency and location of committee meetings.
2. **Short-Term/Periodic Support:** If you don't have the time or flexibility to be involved on a committee for a year, we invite you to help with short-term events or projects, like teaching or co-teaching at a seminar in your area of expertise, hosting a gathering in your office or community, or meeting with legislators in your area.

I hope you will consider becoming engaged at a higher level this year in the collegial, inspiring work of Philanthropy Southwest. You are the key to change and innovation, and together we can make things happen... faster!

**Amy M. Meadows, President, Philanthropy Southwest**

### **Philanthropy Southwest (PSW) Committees**

**Annual Conference Program Committee for 2018 Annual Conference in Galveston, TX:** Organizing sessions, identifying speakers, assisting with logistics (i.e., monitoring sessions during the conference, meeting and introducing speakers, welcoming first-time attendees, managing program evaluation).

#### **Audit & Finance Committee**

Monitoring and reporting to the PSW board the financial condition of the organization, establishing investment policy guidelines, hiring the independent auditor, and reviewing the annual audit and tax filings.

#### **Communications Committee**

Evaluating and implementing PSW's strategic communications plan; proposing and evaluating website and e-mail content and presentation; evaluating member satisfaction, communication, and cooperation; working on other published materials for the Conference such as PSW brochures.

#### **Educational Programs Committee**

Identifying relevant topics; organizing sessions and identifying speakers; evaluating facilities and programs; assisting at seminars and workshops; welcoming first time attendees; and speaking within your own area of expertise.

#### **Legislative Network Committee**

Staying abreast of legislative developments that affect philanthropy; and developing educational materials to equip members to meet with their legislators.

#### **Membership Committee**

Encouraging membership in PSW; developing marketing strategies; evaluating membership applications, and recommending new members to the board.

### **Meeting Frequency**

The first planning meeting is held in early December, typically at the hotel where the conference will take place. Usually the committee meets once more in person in the spring and again the day before the conference opens.

Usually meets three times per year in person and several times per year via telephone conference call.

Usually meets twice per year in person and several times per year via telephone conference call.

Usually meets twice per year in person. Occasional meetings via telephone conference call.

Usually meets twice per year in person. Members are encouraged to attend a group legislative trip to Washington, D.C. in the early spring.

Usually meets twice per year in person and several times via telephone conference call.

**OPTION 1: COMMITTEE VOLUNTEER**

I would like to serve on the committee(s) checked below and understand that committee appointments are for one year.  
 (If you select more than one committee, please indicate your preference by numbering 1, 2 or 3, 1 being highest.)

<u>Committee</u>	<u>Preference (1 = high)</u>		
_____ Annual Conference Program 2018	1	2	3
_____ Audit & Finance	1	2	3
_____ Communications	1	2	3
_____ Educational Programs	1	2	3
_____ Legislative Network	1	2	3
_____ Membership	1	2	3

**OPTION 2: SHORT-TERM/PERIODIC VOLUNTEER**

Philanthropy Southwest may contact me in the future about short-term projects such as those I have indicated below or to ask for my assistance in an area of my expertise (please check below):

<u>Project</u>	<u>Expertise (tell us something about yourself)</u>
_____ Serving as a speaker or volunteer for educational programs in or near my city.	My principal areas of responsibility at my foundation are: _____
_____ Hosting an event for foundations in my city or region, such as a dinner, or organizing a discussion group following a webinar.	Within the foundation field, I know the most about: _____
_____ Contacting other foundation executives whom I know personally to encourage their membership and attendance at a PSW annual conference or program.	My previous occupations have included: _____
_____ Joining a group of local colleagues to visit a state or federal legislator serving my area.	My education and professional training are in these areas: _____
_____ Other: _____	

Name:	Title:
Organization:	
Address, City, State, ZIP:	
Email address:	
Phone:	Fax:

**I have my organization's support for the time and resources necessary to serve.**

Signature: \_\_\_\_\_ Date: \_\_\_\_\_