



# Volunteer Fundraising **PLAYBOOK**

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How to Build, Manage, and Grow a Winning Volunteer Program





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Whether you have a  
volunteer program or  
you're looking to  
start one, this guide  
is for you.

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START

# Introduction

Is volunteer fundraising a key part of your institution's annual fund strategy?

If not, consider this: Institutions with fundraising volunteers are five times more likely to have a participation rate of over 20 percent than those that don't have volunteers.<sup>1</sup>

This makes sense when you think about the psychology of peer-to-peer fundraising. Studies show that 92 percent of people trust peer recommendations over marketing<sup>2</sup>—not to mention the influence of nostalgia and peer pressure when a friend asks a friend to give.

There's nothing more powerful than having alumni, parents, and friends advocating for your cause.

Especially as alumni participation declines in today's competitive nonprofit space, growth-minded

advancement shops will need to invest staff and resources into building and maintaining an active volunteer force.

So how can you make volunteers an integral part of your fundraising team? As mobile and social technology emerges, how can you equip volunteers with the resources they need to make personal, 1:1 connections with peers? And how can you build a program that stays ahead of the changing advancement landscape?

Whether you have a volunteer program or you're looking to start one, this guide is for you. You'll find tactics and ideas from some of the best annual fund teams in the nation, all to help you create, manage, and grow a modern volunteer fundraising program.

**Let's get started.**

<sup>1</sup> EverTrue, "The State of Volunteer Fundraising in Advancement," 2017

<sup>2</sup> Experticity, 2016



**There's nothing more powerful than having alumni, parents, and friends advocating for your cause.**

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# Chapter 1

## The Building Blocks: Structuring a Volunteer Program

Whether you have 10 volunteers or 1,000, it's important to determine how you'll organize your program. This will vary depending on your institution and alumni base, but many institutions use a mix of the following methods.

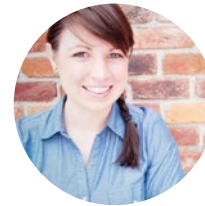
## CLASS YEAR/REUNION

The class-based model—one of the most popular ways to manage volunteers—typically involves class agents or ambassadors who are responsible for making connections with former classmates. In larger programs, class agents may manage a team of associate or assistant agents instead of making the solicitations themselves.

At Carleton College, for example, they've organized their 700 annual fund volunteers into teams of class agents and assistant agents. There is one team per class.

*"In hierarchical order, we have assistant agents, a class agent who coordinates the whole class team, a board member who supports four or five class teams, and staff members who each support 15 to 20 classes and four or so board members."*

*—Maggie Patrick, Director of the Alumni Annual Fund, Carleton College*



## REGIONAL

If you have high concentrations of alumni in certain regions, focus your volunteer fundraising efforts in those areas. For instance, you could create a volunteer group for alumni living in the city of Boston. This is a great model if you want to foster in-person connections; you can hold local events to support fundraising pushes.

## ATHLETICS

Have an athletics foundation? Mobilize your former varsity athletes as volunteers. Create volunteer groups by team (lacrosse, soccer, football, etc.) and ask volunteers to steward fans and former teammates in support of their team or a general athletics fund.

## AFFINITY

While a class-based model is a great starting point, class year isn't always an alumnus/a's strongest tie to your institution. Alumni often identify more with the activities or clubs they took part in. Consider forming volunteer cohorts around different affinity areas—such as diversity, sustainability, the chess club, the school paper, or Greek life.



## PARENTS AND TRUSTEES

Parents, grandparents, and trustees are another source of time, talent, and treasure to tap into. Usually, these types of councils focus on soliciting higher-level donations, hosting community gatherings, and ensuring the long-term success of the institution by giving feedback on initiatives and projects.

**No matter the model(s) you choose, the next step is to identify the perfect volunteers to spread your mission. We'll cover that in the next chapter.**

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	2011-12 Participation	Volunteer to Alumni Ratio
School 1	62%	1:14
School 2	58%	1:18
School 3	57%	1:27
School 4	51%	1:23
School 5	51%	1:37
School 6	52%	1:39
Kenyon	38%	1:80

### MAKING THE CASE FOR A VOLUNTEER PROGRAM? CHECK OUT THESE STATS.

Shawn Dailey, director of annual giving at Kenyon College, conducted a study in 2011-12 that found a correlation between schools with high participation and larger numbers of volunteers.

*“Although correlation is not the same thing as cause and effect, this gives us a glimpse into the structure of high-performing organizations and the value that they place on their volunteer programs.”*





**HELP  
WANTED**

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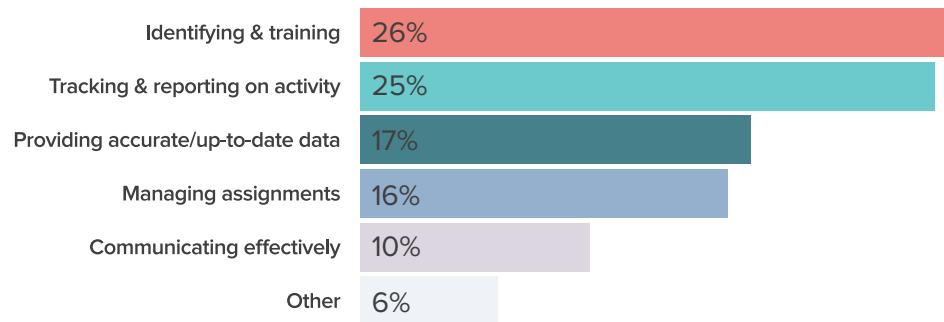
# Chapter 2

## Help Wanted: Volunteer Identification and Recruitment

If your team struggles with recruiting volunteers, you're not alone. In EverTrue's 2017 research on the state of volunteer fundraising, we found that identifying volunteers is the single biggest challenge in volunteer management today.



## WHAT IS YOUR SINGLE BIGGEST CHALLENGE WITH MANAGING VOLUNTEERS?



*EverTrue, "The State of Volunteer Fundraising in Advancement," 2017*

If you approach the process with a strategic mindset, however, volunteer identification doesn't have to be a bear. Treat "hiring" a volunteer like you would any other role; come up with a job description and make a list of the qualities of an ideal volunteer.

After all, volunteers are an extension of your advancement team. They'll be representing your institution in the same way that a full-time frontline fundraiser does. It's important to seek out volunteers who live up to your mission and standards.

In this chapter, we'll dive into the characteristics of a great volunteer and look at some expert-recommended tactics for identifying volunteers.

# What Makes a Perfect Volunteer?



*“I want someone who’s a little bit **relentless**... who doesn’t have fear. You need to have thick skin and be willing to pick up the phone, send another email, or do whatever it is.”*

Traci Wolfe, Director of the Annual Fund, Amherst College

*“The most fundamental thing is the nature of the relationship that a person has with Carleton. While a volunteer certainly needs to be provided with a basic framework and guidelines for their work, **trust** is more important than memorizing talking points. If we can help ensure volunteers trust the institution and can communicate that trust to others, that means they’ll stay on board even if they don’t understand or agree with every decision.”*

Maggie Patrick, Director of the Alumni Annual Fund, Carleton College

*“Someone who’s **enthusiastic** about William & Mary... and willing to follow through on what we ask them to do. Also someone who has a demonstrated commitment to financially support William & Mary.”*

Chris Stratton, Senior Associate Director of Volunteer Engagement, College of William & Mary

*“Someone who **has the time** and will **actively participate**. If you find someone who has all the right skills, but they’re too busy to do it, then it’s not going to work. You need people who are willing to take action and who have a level of commitment to the college to do it.”*

Shawn Dailey, Director of Annual Giving, Kenyon College



# A SAMPLE VOLUNTEER

# Job Description

The mission of [Volunteer Program] is to enhance alumni engagement and encourage philanthropic support towards [School Name]. As a volunteer, you will play an important role in serving as a liaison between your classmates/fellow alumni and the annual fund. Volunteers are expected to demonstrate a passion for [School Name] and a desire to make an impact on the future of the institution.

## **Roles and Responsibilities**

- Contact classmates via email, phone, and social media to provide updates from [School Name], solicit an annual gift or pledge payment, give thanks for a previous gift, gather updated contact information, and extend event invitations
- Contribute to the annual fund each year at a level that sets an example of personal leadership
- Participate in annual outreach pushes at the end of the calendar year and the end of fiscal year
- Attend volunteer conference calls, trainings, and meetups offered by staff
- Identify and refer alumni who would make valuable volunteers



## PROACTIVE IDENTIFICATION

The alumni website might do a great job of marketing your volunteer program—but if you’re serious about increasing your volunteer headcount, it’s a good idea to do some identification and outreach on your own.

*“Our team probably does 95 percent of the volunteer recruitment. On several occasions over the last few years, my team has gone into recruitment mode where we send a lot of emails and make phone calls to people who are consecutive-year donors. We’ve also had our analytics team come up with ways to measure a volunteer engagement score.”*



*—Chris Stratton, Senior Associate Director of Volunteer Engagement, College of William & Mary*

Here’s the criteria that annual fund leaders use to generate lists of volunteer candidates:

- **Consistent giving to the annual fund:** They don’t need to have given every year, but look for people who have given at least three of the last five years, for example.
- **Event attendance:** Someone who frequently shows up at alumni events and meetups could make a great volunteer.
- **Previous volunteer experience:** Have they served on a reunion committee? Been involved in a local alumni club?
- **Class notes:** Look for alumni who have taken the time to submit a class note to your magazine or digest.
- **Student leadership:** Alumni who formerly served in leadership roles on campus (varsity captain, editor-in-chief, club director, etc.) generally have large networks and can help you penetrate different social circles.
- **Social media engagement:** Which alumni are highly engaged with your institution on Facebook?
- **Industry/company:** Segment alumni by career. For example, if an alumnus lists “Nonprofit Organization Management” as his industry on LinkedIn, he likely understands fundraising and could be a good candidate.
- **Geographic region:** Have a high percentage of alumni in New York City and Boston? Gain more volunteer coverage in those regions by focusing your search by location.

Once you've pulled your list(s), it's time to reach out and make the asks! Many annual fund teams tackle this outreach on their own, but others prefer to enlist the help of volunteers. At Carleton, for instance, the team provides lists to board members or class agents who evaluate the candidates and make the actual asks. Which leads perfectly into the next tactic...

## WORD-OF-MOUTH BUZZ

Rely on the volunteers themselves to recruit new team members! Ask volunteers to spread the word and to refer anyone they think would make an amazing team member. You could even set up a referral competition to see who can bring in the most new volunteers.

Remember, though, that not every referred candidate is going to be a good fit. Use the same screening process you'd usually use to "hire" a volunteer.

*"We like to cast a very wide net. We'll ask Class Agents to send out a general request to the class about becoming a volunteer. We tell people we want them to be part of our winning team because people like to win, and they're helping the college win."*

*–Traci Wolfe, Director of the Annual Fund, Amherst College*



**Rely on the  
volunteers themselves  
to recruit new team  
members!**

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Make volunteers feel like VIPs in the eyes of your institution.

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# Chapter 3

## Volunteer On Board: Training Volunteers to Be Champions

Just as new employee onboarding is important to an organization, having a structured onboarding process for new volunteers should be a priority, not an afterthought. Consider it an opportunity to set volunteers up for success and to make them feel like VIPs in the eyes of your institution.

*“There are three different things you need to build with your volunteers when you’re training them: trust, energy, and knowledge. Then, as you’re onboarding them, further build that trust so that they’re all on the same page with you by the time they get going.”*

*—Maggie Patrick, Director of the Alumni Annual Fund, Carleton College*



The training tactics you use will depend on the number of volunteers you bring on board. Either way, test out a variety of methods to see what works best for your volunteers. Is it difficult to hold their attention for an hour? Are younger volunteers less likely to flip through a 50-page handbook? Ask volunteers what they prefer, and mix and match your tactics accordingly.

## **WELCOME KIT AND HANDBOOK**

Take volunteers back to the day when they got their school acceptance packet in the mail! By sending a welcome kit to new volunteers, you’ll make them feel special and help generate excitement about the program.

At many schools—including Williams, Amherst, and Carleton—volunteers receive a printed handbook containing key information about the program, FAQs, and instructions on being a volunteer. Your kit might also include a signed welcome letter and fun items like branded magnets, pens, phone wallets, or sticky notes.

## **ONBOARDING CALL**

After the volunteer receives the welcome kit, schedule a quick onboarding call to establish a 1:1 connection with your new team member. If applicable, include the supervising board member and/or head class agent on the call. This is a chance to make introductions, answer the volunteer’s questions, and set expectations for the role. In addition, let the volunteer know how often they can expect conference calls or meetups—monthly, quarterly, or anything in between.

## ONLINE TRAINING WEBINAR

As you scale your program, holding hour-long training webinars can be more efficient than calling each volunteer one-by-one. At the College of William & Mary, for example, the team holds online training webinars during intense recruitment periods. Most webinar software allows you to record live webinars, so you can send the recordings to volunteers who aren't able to attend.

## TRAINING VIDEOS

If asking for an hour of a volunteer's time is too much, consider making short tutorial videos. These should be no longer than three to five minutes each and can cover topics like "How to Make an Ask" and "How to Recruit a New Volunteer." You could even ask an all-star volunteer to help create and host the videos. (Don't be afraid to inject personality and humor into the content when appropriate!) Post the videos on your website resources page or pass them along to new volunteers by email.

## ON-CAMPUS SUMMIT

Bring your volunteers together for an action-packed training weekend! Invite volunteers back to campus for an exclusive event to kick-off the fiscal year. Summer is a great time to hold something like this.

For new volunteers, a summit is a great way to deliver crucial information via interactive workshops and break-out sessions. For existing volunteers, it can serve as a refresher on solicitation strategies while giving them the opportunity to collaborate with other volunteers. If possible, reserve time in the programming for lectures and Q&As with senior administrators. Volunteers are your biggest advocates and deserve insider access to campus leadership.

**Pro Tip: Train volunteers to contact prospects individually, not en masse. Remember—the point of volunteer fundraising is to harness the power of 1:1 peer connections!**

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Every interaction with a volunteer should make them feel like a valued part of the team.

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# Chapter 4










## Empowering Volunteers to Go Forth and Raise

Empowering your volunteers goes beyond the initial training process. Once they're out in the field, it's important to continue equipping them with the resources they need to be successful. From promptly sharing assignment information to delivering interesting news and content, every interaction with a volunteer should make them feel like a valued part of the team.

## SHARING INFORMATION WITH VOLUNTEERS

Once you and your volunteers have worked together on prospect lists (a volunteer could take anywhere from 10 to 150 prospects depending on his or her capacity), it's essential to provide volunteers with details about their prospects. This will help volunteers connect with peers in a more personal, strategic way.

Here are the data points that annual fund leaders recommend sharing with volunteers:

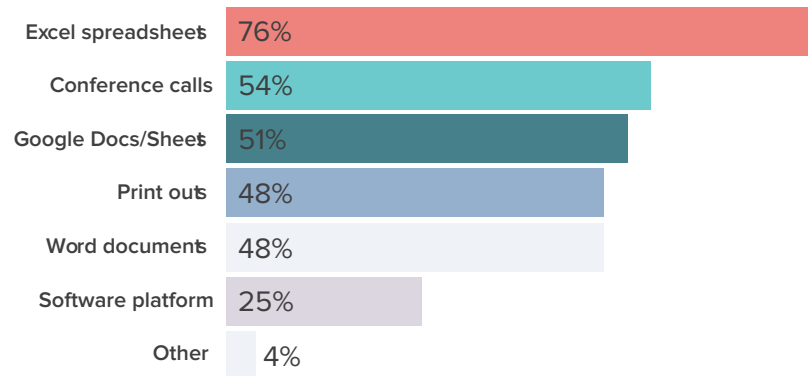
-  Last five years of giving history (excluding major gifts)
-  Graduation year
-  Major student activities
-  Email address
-  Past volunteer interactions
-  Phone number
-  Location
-  Job title, company, and industry
-  Facebook engagement data

While spreadsheets are the most common way to share prospect data with volunteers, they can be time-consuming for your team and a clunky experience for volunteers. Consider making assignment data available to volunteers in a user-friendly software platform. Whereas the information in spreadsheets is almost immediately out of date, software has the ability to always display updated data.

That way volunteers will be able to access their assignments on web and mobile—and you don't have spend time pulling reports and sending documents to volunteers on a one-off basis.

Be sure to also share content and campus news with volunteers. Even if the content isn't related to fundraising, it creates additional opportunities for volunteers to engage with prospects and build their trust. In fact, this is a central part of Kenyon College's volunteer strategy; the team views volunteers as not only a fundraising channel, but also as an engagement channel. Volunteers reach out to peers on an ongoing basis with news, event invites, and more.

## HOW DO YOU SHARE INFORMATION WITH VOLUNTEERS?



EverTrue, "The State of Volunteer Fundraising in Advancement," 2017

*"We see volunteers as a necessary extension of our communications strategy because they're able to deliver a message that someone might otherwise ignore. If we have a big piece of news that we want to share with our alumni, we send that out to our class agents and say, 'Here's this message that we would like you to share with your classmates.'"*

*—Shawn Dailey, Director of Annual Giving, Kenyon College*







## SETTING GOALS AND TRACKING PROGRESS

A great way to keep volunteers motivated is to establish goals. How many contacts should volunteers make per year? What's the target participation rate per volunteer team? What's the dollar goal?

Collaborate with volunteers to set goals that align with your overarching participation and dollar goals. Maybe you want 50 percent of constituents assigned to volunteers to make a gift. Or maybe you want volunteers to make contact with 100 percent of their assigned peers.

Whatever goals you set, share them with volunteers so they have something tangible to work towards! Throughout the year, keep volunteers updated on new gifts, participation rates, and dollars raised—either manually or via your online volunteer portal. Then, at the end of the year, regroup with volunteers to review performance, talk through challenges, and set new goals.

## BREAKING DOWN SILOS

The best volunteer programs are tightly integrated with other parts of the advancement office. If a volunteer learns valuable information about a prospect that could be important for a major gifts officer or a prospect researcher, the volunteer should have the ability to easily share that information with staff. If the alumni relations team engages a volunteer's prospect via social media, the volunteer should know.

**The bottom line:  
treat volunteers like part of your office!**

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Although pushing insights from volunteers to staff (and vice versa) can be done manually, technology can help automate this process. If you have a volunteer portal, volunteers should be able to log interactions—like emails, calls, texts, and social media messages—that append directly to the prospect's profile. This will give your entire office insight into volunteer activity.



NEW  
MINDSET



NEW  
RESULTS

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# Chapter 5

## Tried-and-True Stewardship Ideas

The best annual fund leaders know that stewardship isn't just saying "thank you." Stewardship is an ongoing process: it begins the day a volunteer signs on and continues throughout an individual's lifecycle as a volunteer.



Stewardship means making volunteers feel welcome, empowered, and special. It means delivering the best possible experience for volunteers, every step of the way.

What does this look like in action? Here's how different institutions engage, motivate, and steward volunteers.

*"During our volunteer training weekend, we offer volunteers free on-campus housing and food. They get private time with not only the president, but also the college treasurer and usually a couple of the other deans.*

**We're saying, 'It's really important that you be here. We want you to be able to have access to this program and our resources, and we're going to make that happen for you.'**

*Thanking volunteers, of course, is a part of stewardship too—so we work to make sure our language indicates that every accomplishment is their accomplishment. We send personal, handwritten thank you notes in the summertime. We send them valentines in February. We give them lots of free swag."*



**Maggie Patrick, Director of the Alumni Annual Fund, Carleton College**

*“I’m constantly telling volunteers that they’re great. I send them video clips that say, ‘You’re awesome. This is how you make me feel,’ with people dancing and fireworks. Part of stewardship is taking the time to really know your volunteers and to make them feel connected to this place and to the Annual Fund team. This year, we sent a package to all Class Agents with a card that’s hand signed by everybody on the team.”*



**Our president also made a gift in honor of each Class Agent, and that made it clear how important everyone on this campus thinks each Class Agent’s work is.”**

**Traci Wolfe, Director of the Annual Fund, Amherst College**

*“Some years we have a class agent giveaway that features an item that you only can get by being an active class agent and by reaching out to your classmates. The first year it was a custom-knit hat that said ‘Kenyon Class Agent.’”*



**We also give class agents free admission to regional events. So if we’re doing an event at the Museum of Modern History and it costs 15 dollars to attend, class agents get in free.”**

**Shawn Dailey, Director of Annual Giving, Kenyon College**

**“Sometimes we’ll get tickets to the suite at a football game, or court-side seats at a basketball game, and we’ll blast that out to volunteers and say, ‘The first 10 people who respond can get two tickets to the game.’”**

*We’ll also do a drawing among our top class ambassadors for a campus parking pass, which normally only goes to people who give at least 5,000 dollars a year.*



*We’ve tried to start doing some regional events this year, like happy hours, dinners, and networking events. We have a volunteer reception every year at homecoming that they’re all invited to.”*

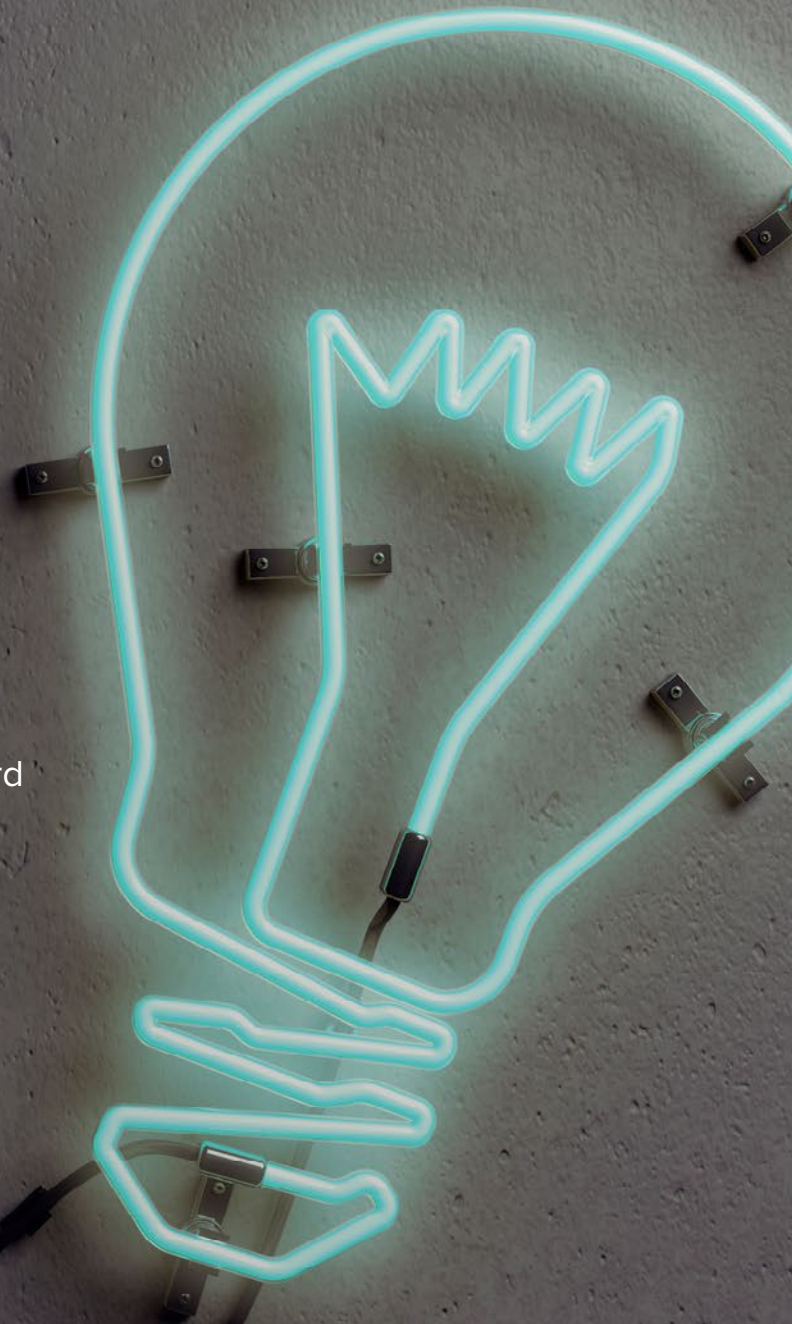
**Chris Stratton, Senior Associate  
Director of Volunteer Engagement,  
College of William & Mary**

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# Final Words of Wisdom

So far you've learned about the basics of a volunteer program and how to identify, onboard, empower, and steward volunteers. While we cannot hope to cover every aspect of growing a volunteer program, this guide should serve as a great starting point.

Ready to get started? Here are some final thoughts as you build your program.



**1 Start small.** Make sure you have a high-quality pool of volunteers—maybe it’s just 10 to 15 people at first—and build out the program from there. You may even start with just your board members; they can be just as effective as professional fundraisers if trained appropriately. Over time, your first group of volunteers will help you find and train new talent. Be patient and remember that building a program with hundreds of volunteers can take years.

**2 Prove results... and then increase your investment.** Initially, you might not have the budget to hire a full-time employee to manage volunteers. Don’t worry—you can still get started! Ask other staff members to pitch in on building and managing the program. Once the pilot program produces results, take those numbers to your leadership team and/or the board to make the case for a dedicated FTE and further resources.

**3 Get buy-in from key departments.** Running a successful peer-to-peer program requires collaboration among many departments across campus—IT, communications, major gifts, and more. If you’re thinking about starting a program, establish partnerships with key stakeholders early in the process. Educate them about the impact of a volunteer program on alumni participation, highlighting that it can help build a pipeline of future major donors.

**4 Embrace technology.** While 64 percent of institutions do not use software to support their volunteer programs, technology has the potential to alleviate many of the challenges inherent in managing volunteers.<sup>1</sup> The right solution can free you from spreadsheets, empower volunteers, and help you scale your program. As you evaluate vendors, make sure that the volunteer-facing application mirrors the types of apps that volunteers are already using in their daily lives.




Want to learn more about volunteer management? Check out our original research on “[The State of Volunteer Fundraising in Advancement](#)” here.

EverTrue is a leading advancement software that supports fundraising efforts at educational institutions. By connecting institutional data with dynamic insights from LinkedIn, Facebook, Zillow, the U.S. Census, and more, EverTrue provides advancement offices with the modern data and tools they need to engage alumni, raise support, and measure team progress. Today, EverTrue is improving results for more than 300 institutions through a fully integrated suite of products that powers efforts across the entire advancement office.



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*Thank you to all of the annual fund and advancement professionals who contributed to this piece with insights, advice, and research on volunteer management.*