

Converting Volunteers Planning Worksheet

Use this checklist of questions to plan out your team's strategy around cultivating long term donor relationships with your volunteers:

- ☐ What volunteer opportunities do you offer for first-time volunteers?

- ☐ What opportunities do you offer for returning or specialised volunteers?

- ☐ What opportunities do you have for volunteers, donors, and advocates to engage with your organisation in the other two ways?

- ☐ Where do you publish your volunteer opportunities?

- ☐ How do you collect volunteer signups?

- ☐ How do you track participation during and after volunteer opportunities?

- ☐ How current, complete, and accurate are your volunteer participation records?

- ☐ What ongoing communications do you have with past volunteers?

- ☐ Are volunteer communications aligned with donor communications, or are they managed separately?
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- ☐ Does your Volunteer Team reference donor history data, and does your Development Team reference volunteer history data?
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- ☐ What is your ideal donor profile?
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- ☐ What signals can volunteers demonstrate to indicate their potential as high-value donors?
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- ☐ What technology is currently blocking you from accomplishing any of the above strategic objectives?
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- ☐ Do you keep volunteer participation in Blackbaud Raiser's Edge NXT®?
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- ☐ Do you have 360°-degree volunteering, advocacy, and donation data within the Constituent record in Blackbaud Raiser's Edge NXT?
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