



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 specialized volunteers?

- What opportunities do you have for volunteers, donors, and advocates to engage with your organization 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?

- Does your Volunteer Team reference donor history data, and does your Development Team reference volunteer history data?

- What is your ideal donor profile?

- What signals can volunteers demonstrate to indicate their potential as high-value donors?

- What technology is currently blocking you from accomplishing any of the above strategic objectives?

- Do you keep volunteer participation in RENXT?

- Do you have 360°-degree volunteering, advocacy, and donation data within the Constituent record in RENXT?

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