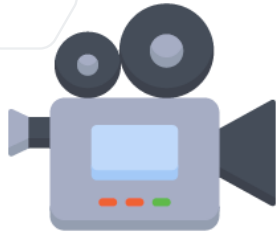


# Fundraising Event Essentials: How to Recruit & Manage Volunteers



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Text Fundraising | Peer-to-Peer | Auctions



+ **We're recording this webinar!** We'll send you a copy after the webinar is complete.



+ **Feel free to ask questions!** Use the Q&A option to ask questions and the chat option for general discussion: we'll answer all questions in a Q&A portion at the end of the presentation.



+ **Share your highlights and takeaways** on your favorite social media channel and make sure to give us a follow!



## FUNDRAISING TECH

# Made for you



### Designed with you in mind

Designed for fundraisers by fundraisers through customer-led development input



### Time saving data tools

Save time, attract and retain donors, and raise more money with all of your fundraising data in one place



### Powerful integrations

Easily integrate with your third-party CRM, email provider, and accounting software

# Meet the Speaker



## Justin Cook, Director of Demand Generation

- + With Qgiv for five years and a marketing professional for over seven!
- + Digital marketing and optimizing the user journey are my areas of expertise.
- + I have three animals: one dog and two cats.





# What We're Covering Today

- + How to find and recruit volunteers
- + How to train your volunteers
- + How to retain your volunteers
- + How to use Qgiv's tools to manage your volunteers



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# Volunteer Recruitment



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# Where to Find Volunteers

Before we begin recruiting, we'll need to identify where we're going to find volunteers. As your nonprofit grows, you'll naturally attract new volunteers, but how do you generate new volunteers without waiting?

- + Check your current donor base and past volunteers.
- + Utilize established recruitment platforms.
- + Build a referral network with other nonprofits.
- + Reach out to local businesses.
- + Attend networking events.



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# How to Recruit Volunteers

Now that you know where to find volunteers—it's time to take action to encourage them to take the next steps and sign up. A few ways you can encourage volunteers to sign up include:

- + Offering a wide variety of volunteer opportunities
  - Full time, part time, point in time (events)
- + Sending out a call for volunteers
  - Social media, email, text message, phone calls, in-person conversations
- + Clearly explaining your needs and how participation works
- + Simplifying the sign-up process





# Simplify Sign-Up

A confusing or extended sign-up process will turn away potential volunteers from getting involved with your mission. Here are some ways to simplify the sign-up process:

- + Create website pages or custom pages online.
- + On your registration forms or dedicated volunteer form:
  - Use custom fields to ask about how volunteers wish to help.
  - Add conditional fields to gather more information.
  - Grab their email address and phone number.
  - Identify their communication preferences.
- + Integrate with your favorite CRM for more volunteer management.

The screenshot displays a registration form with the following sections:

- Choose Your Tickets:** A dropdown menu for selecting the number of tickets. The 'General Admission' option is selected, priced at \$10 for 1 ticket. A note indicates a discount for buying 2 or more. The 'V.I.P. Admission' option is priced at \$25 for 1 ticket but is marked as 'Sold Out'. A note for V.I.P. admission mentions perks like a free t-shirt and early access.
- Sponsors:** A dropdown menu for selecting the number of sponsor tickets. The 'Digital Sponsor' option is selected, priced at \$300 for 1 ticket.
- Volunteers:** A section with a checked box for 'Include attendee details'. It asks for the first name (Justin) and last name (Cook), both optional. It also includes fields for phone number and email (justin.cook@qgiv.com), all optional. Below this, it asks 'How would you like to volunteer for the market?' with three checkboxes: 'Vendor Support', 'Check-in & Information Booth', and 'Food & Beverage Stands'.
- Total:** A summary box showing 'Total' as 'Free' and an 'Apply' button for a promo code.

At the bottom of the form, there is a 'Back' button and a green 'Complete Registration' button. The footer includes 'Powered By Qgiv', a security notice 'Transaction is secure and encrypted.', and a 'digicert EV SSL' logo.

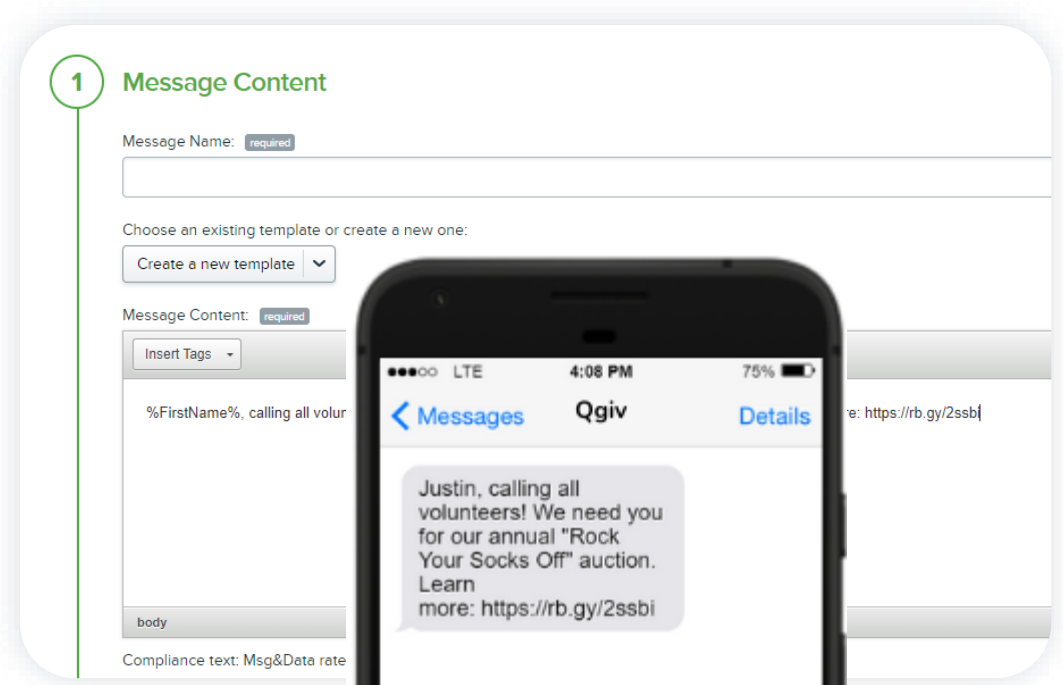


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# Use Engagement Tools

Once you have your volunteers' information and their preferred communication channels, you can use engagement tools to get them involved.

- + Build volunteer lists based on their preferred volunteer opportunity.
  - Segment event volunteers.
    - Committee members, specialized volunteers, day-of volunteers.
- + Use outbound text messages to capture the attention of volunteers.
- + Add the volunteer's first name to personalize your message.
- + Link back to your volunteer page.



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# Volunteer Training



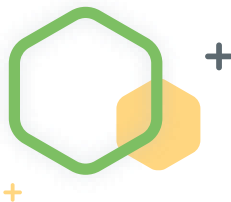
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# Volunteer Training

Your volunteers are invaluable to the success of your event. Properly prepare your volunteers with resources about their role.

- + Provide a volunteer packet.
  - Detailed information about your organization
  - Event goals and timelines
  - Information on their duties and role
  - A list of staff and their duties
  - Fundraising resources
- + Hold a meeting to discuss roles.
  - One-on-one meeting for committee or specialized roles
  - All hands meeting for general event duties
- + Do an event walkthrough.





# + Event Tools Training

Depending on the role of your volunteer, they may be in a position in which you need to train them on how to create an event page, how to check someone in onsite, or help someone navigate a bidding app.

- + Add volunteers as users and control their permissions.
  - Provide access to specific needs (marketing, onsite, etc.)
  - Update or create event pages with a drag-and-drop builder
  - Committee volunteers may need to run and export financial reports
- + All volunteers have access to:
  - Fundraising dashboards to visualize goals
  - An extensive Help Desk and unlimited support and training

The screenshot displays the Qgiv interface for event management. It shows three event pages with their respective permissions:

- Lakeland Food Pantry [event]**  
No permissions selected.  
Form Administrator:  Manage Form,  Share Form,  Manage CMS,  Reports and Statements,  Manage Receipts,  Events,  Virtual Terminal,  Manage Media
- BBBS Virtual Pumpkin Patch**  
No permissions selected.  
Form Administrator:  Manage Event,  Share Event,  Manage Store,  Reports and Statements,  Manage Content,  Manage Constituents,  Virtual Terminal,  Manage CMS
- Arts Coalition Auction**  
No permissions selected.

Below the event pages is a "My Dashboard" for the Arts Coalition Auction, showing:

- Total Contributions: \$11,356.43 (2.7% from last 7 days)
- Transactions Made: 34 (70.9% from last 7 days)
- Completion Rates: 82.5% (2.6% from last 7 days)
- Two charts: "Total Contributions" (bar chart) and "One Time vs Recurring Donations" (line chart).
- Recent Transactions table:

ID	Date	Name	Status	Method	Amount
123456	01/29/2021	Mike Test	Success	MasterCard	\$50.00
234567	01/28/2021	Grant Larson	Success	Visa	\$100.00
345678	12/04/2020	Don Bough	Success	MasterCard	\$10,000.00
456789	10/23/2020	Garrett Maxwell	Success	E-Check	\$250.00

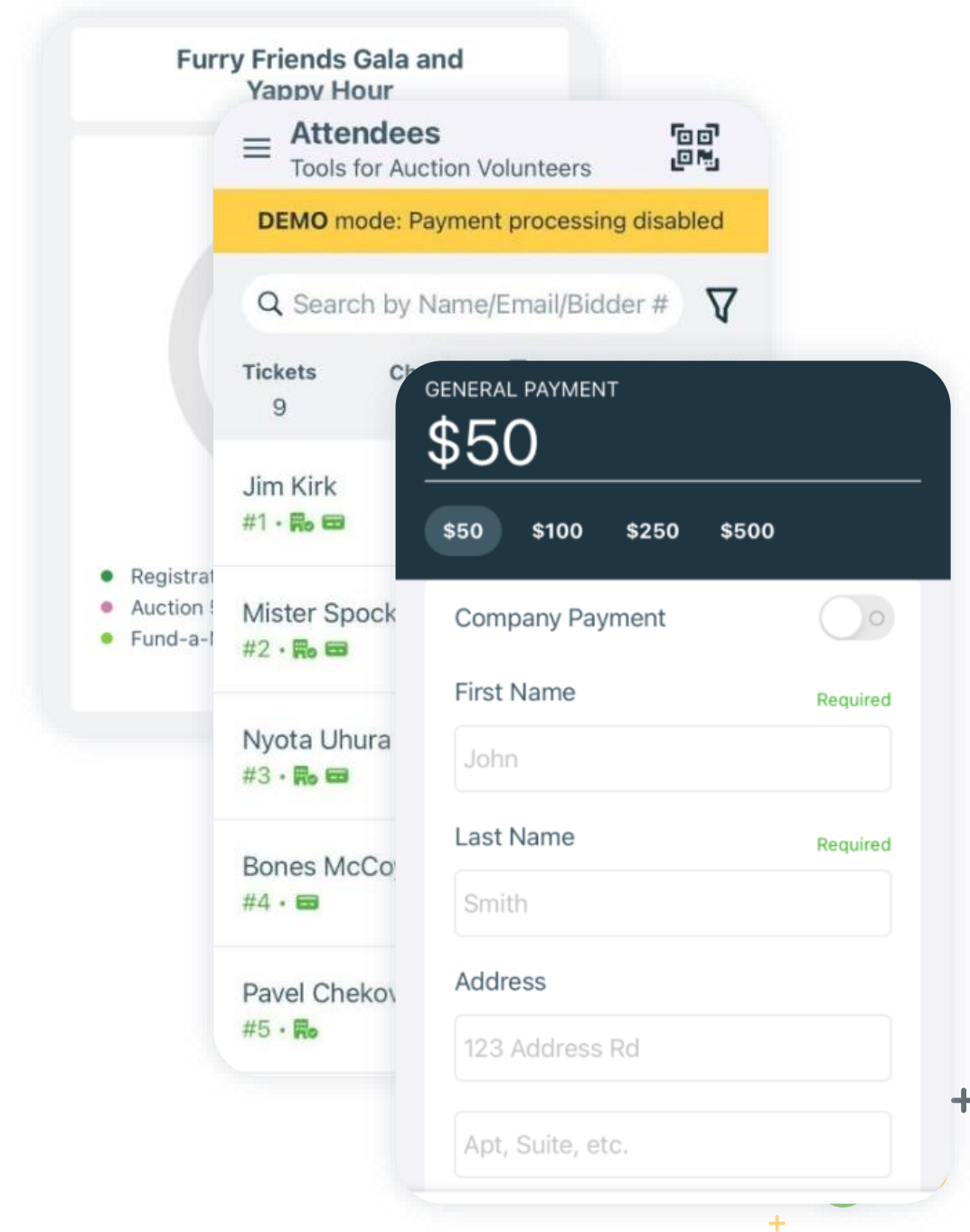




# Onsite Tools Training

For volunteers that are helping with onsite management, make sure to get them trained and get a few practice runs in before the big day.

- + Train volunteers on management platform.
  - Virtual Terminal accessed through a laptop
  - Management apps (Mobile Virtual Terminal)
- + Give volunteers the ability to accept donations, last-minute registrations, or onsite purchases.
  - Cash or credit cards
- + For auctions, train volunteers on how to use your bidding tools.







# Managing Your Event Committee

From helping coordinate logistics to creating event communications, this team will help with all aspects of your event.

Once you establish the fundraising goal and event budget, get feedback from your committee about:

- + The format of your event
- + Where the event will be held
- + How registrations will be accepted

Be mindful of what decisions volunteers can make vs. what needs to be closely monitored by your staff.



# Volunteer Retention



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# + Volunteer Retention

Keep the positive experience going by sending out "thank-you" notes to those that worked so hard to help create and manage your event.

- + Provide a conclusion to your event.
  - How much did you raise? Did you reach your goals? How is that going to impact your organization?
- + Celebrate your volunteers through text or video.
  - Send a personal thank you through email, in a handwritten letter, or give them a call.
  - Shout out volunteers on social media.
- + How can you use your donor recognition programs?
  - Host volunteer appreciation events.
  - Give out special awards or small gifts.
- + Ask for feedback on the event and volunteer process.





# Retention Tools

Utilize your fundraising tools to enhance your volunteer retention efforts!

- + Create customized thank-you emails and confirmation pages on your sign-up form.
  - Add a personalized thank you with impact statements, images, videos, and social sharing.
- + Use all the information you gathered.
  - How volunteers wish to participate
  - Phone number
  - Email
  - Mailing address
- + Integrate with your CRM and other favorite nonprofits tools.



**"When we came to the ship for the first time, I was just thanking God over and over. There is no gift greater than good health."**

—Benessa's mother.

Thank you again for making a difference. The prayers and support of caring friends like you truly turn lives around.

We look forward to your continued support. If you'd like to do more, we offer many ways for you to help by [supporting a crew member](#), [shopping our catalog](#), or even [leaving a legacy](#).

**Many employers sponsor matching gift programs** and will match any charitable contributions or volunteer hours made by their employees. Click [here](#) to find out if your company has a matching gift policy.

Following the model of Jesus,

Don Stephens  
Founder

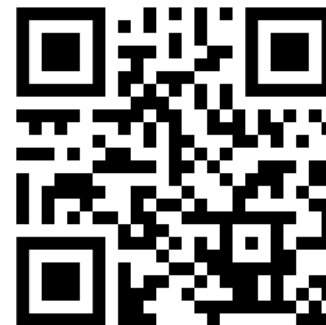




# Download the Ultimate Event Guide

Download *The Ultimate Event Guide* for more information on pre-event planning, event operations, and post event wrap up. The guide includes:

- + How to identify the objective of your event and create a budget
- + How to recruit volunteers and secure sponsorship
- + Checklists for onsite and virtual events
- + What you need to do to mitigate potential disaster
- + How to evaluate your event afterwards for continued success



# Qgiv's Event Tools



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# Online Event Registration

No matter what type of event you're looking to run, Qgiv can help you every step of the way:

- + Accept registrations online and create beautifully branded landing pages with Qgiv's **event registration tools!**
- + Empower donors to raise funds on your behalf with **peer-to-peer fundraising.**
- + Create and manage your **auction events** through Qgiv's auction app.





# Onsite Engagement

Manage your attendees before and onsite at your event with these tools.

- + Quickly search, check in, check out, or add purchases/donations with a **Virtual Terminal**.
  - Available in an app or online. It's easy to train staff and volunteers!
- + Accept purchases quickly with **card readers**.
- + Create a **virtual layout of your table and seating** to optimize the flow of your event.
- + Use text fundraising to accept **pledges and send event updates**.





# Learn More!

Are you a Qgiv customer?

Email us at  
[support@qgiv.com](mailto:support@qgiv.com)

Interested in using Qgiv?  
Request a demo through  
[qgiv.com/demo-request](http://qgiv.com/demo-request)

Have questions about  
best practices?  
Visit [qgiv.com/blog](http://qgiv.com/blog)



# Meet the Team



**Brittany Bedford**  
Customer Success Manager



**Caitlin Lipham**  
Customer Marketing Manager

# Q&A



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