

Volunteer Training Checklist



- Volunteers need a written job description
- Volunteers must be passionate about the mission – orient them to the organization with an open house, tour and meeting with leadership
- Volunteers must understand the organization’s case for support
- Volunteers must make their own gift to the campaign
- Volunteers must understand and have documentation for the contribution and naming opportunities
- Volunteers should understand what types of gifts can be accepted, including
 - Cash
 - Pledges
 - Gifts of Stock
 - Gifts of Real Property
 - Planned Gifts
 - Others
- Volunteers should be aware of policies regarding gift acceptance
- Volunteers should sign a privacy waiver
- Volunteers must know the full campaign timeline
- Volunteers must have clear guidelines on their expected timeline
- Volunteers must have achievable and realistic goals
- Volunteers must know the procedures for asking, including
 - Selecting prospects
 - Establishing a specific ask amount
 - Obtaining a face-to-face appointment
 - Send introductory letter on campaign letterhead
 - Distribute materials (case, pledge form) in person
 - Making the ask
 - Reporting progress
- Volunteers should be given the opportunity to practice asking a group training session
- Volunteers must know what success look like for the organization
- Volunteers need to know how staff will support them and be given the opportunity for staff to accompany them if possible