

From Recruitment to Retention

Managing the VITA volunteer journey

Miller Wilbourn
Senior Corporate Engagement Manager
Foundation Communities



Our unique model

We have dedicated staff for volunteer engagement

Our Tax Help program staff own the tax expertise.

Volunteer Engagement owns much of the journey that gets volunteers ready and supported.

BELLA CHENG
Volunteer Engagement
Manager

DRAY SEARS
Volunteer & Recognition
Coordinator

And one quirk: Bella, Dray, and I are not tax preparation experts



PEOPLE ARE GENEROUS

They want to help

This is the foundation for all that follows

ALLOW ME TO BRAG

22,090

VOLUNTEER HOURS

- 15,650 tax returns
- \$25.8 million in refunds

475

VOLUNTEERS SERVED

Up from 445 volunteers in 2025

762

PEOPLE SAID YES

9

VOLUNTEER SITES

NOW MAY I CONFESS?

762 SAID YES

287 NEVER SERVED

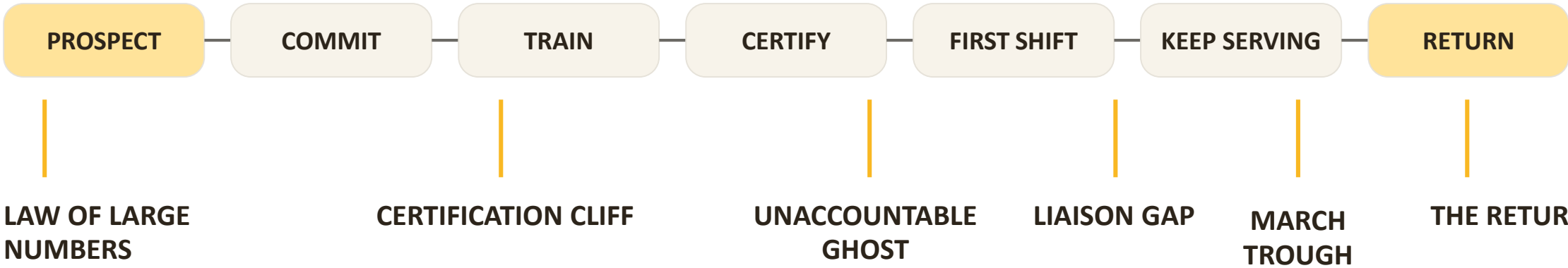
- **235** never finished certification
- **11%** Client Liaison shift coverage at one site
- **Drop from 350 to 183** weekly volunteers in mid-March

People are generous. People are busy.

The VITA volunteer journey

PEOPLE ARE GENEROUS

PEOPLE ARE BUSY



Every drop-off deserves an explanation

The friction audit

01

WHERE DID WE LOSE PEOPLE?

The honest number

02

WHAT DID WE FIND?

The diagnosis and what we changed

03

WHAT WORKS AT YOUR SIZE?

The transferable version

HOW DO WE KNOW?

Weekly tracking

Volunteer feedback

We did not guess. Volunteers told us, or the numbers did.

01 THE LAW OF LARGE NUMBERS

MY VOLUNTEER RECRUITMENT VERSION

~20,000

reachable people



5,000–10,000

segmented volunteer contacts



762

people who say yes

Even a 1% response rate can work when the number is large enough

Large starting number. Segmented asks. A commitment form that takes only a few clicks.

AT ANY SIZE

A spreadsheet is enough

Track contact, recency, role, source and likely returners.

BREAK 1

WHERE DO YOU LOSE PEOPLE?

Prospect Commit Train Certify First shift Keep serving Return

Turn to someone near you

Where is your biggest drop-off?

60 seconds each. Tell each other where you lose the most volunteers.

THE CERTIFICATION CLIFF

762

COMMITTED



527

IRS CERTIFIED

31%

disappeared after
already saying yes

235 willing people
gone before service began

AT ANY SIZE

Treat training as a retention stage

Structure and support matter more than software.

The training support system

A course alone will not carry people to certification



Foundation Communities controls most of the road

The IRS controls the finish line

AT ANY SIZE

- Add structure around Link & Learn
- Communicate promptly, thoroughly, and often
- Pick up the phone
- Set a deadline.
- Offer one live help session.
- Give volunteers one human contact.

03 THE UNACCOUNTABLE GHOST

527

CERTIFIED



475

SERVED

52 people did the hardest part

Then never walked through the door

AT ANY SIZE

Make the first shift feel smaller

Personal message. Named greeter. Permission to ask questions.

TAX PREPARER

75–98%

of shifts filled

CLIENT LIAISON

11–44%

at several sites

At the same sites where we had more tax preparers wanting to sign up than we had stations, we struggled to fill client liaison shifts.

This is part training decision, part misconception. And yes, we need more translators.

AT ANY SIZE

Examine the role and how it's perceived

Does the title, training or invitation imply that one role matters less? Are people intimidated by it?

BREAK 2

PICK YOUR BIGGEST DROP-OFF

Diagnose it before you solve it

ASK

Are we asking for too much?

FRICTION

Did we make the next step harder than necessary?

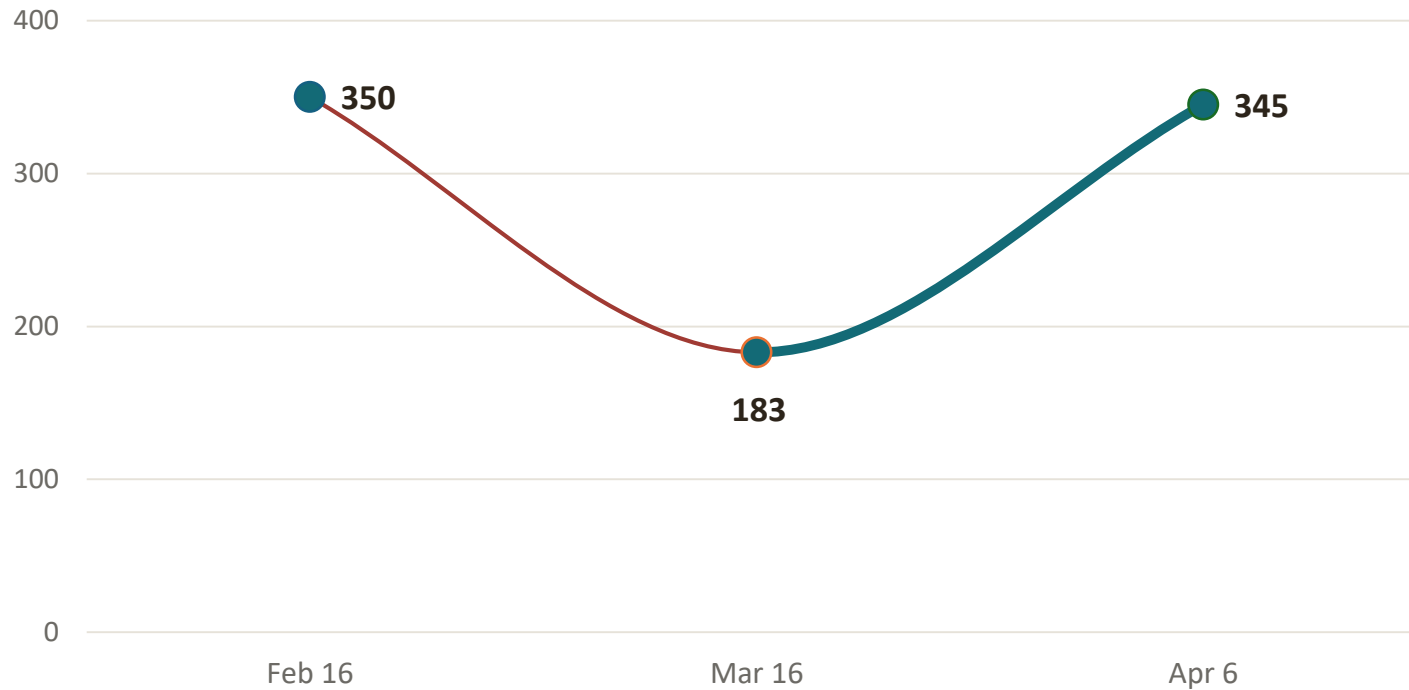
FRAMING

Does the opportunity feel unclear, intimidating or less valuable?

Choose one change you could make

05 THE MARCH TROUGH

WEEKLY SCHEDULED VOLUNTEERS



UT PRACTICUM

53

students during Spring Break

387.78

hours

The prior week: 130 students and 656.32 hours

AT ANY SIZE

Build a pipeline, not only a prospect list

One class, employer, church or student group can become a recurring source.

YOUR EASIEST RECRUIT

is just waiting to hear from you again this year

Returning volunteers arrive partly trained. They stabilize the schedule and the people around them.

- Leadership roles
- Year-round connection
- Recognition and milestones
- Off-season contact



Individual volunteers and institutional pipelines return differently

Six drop-offs. Several different problems.

LAW OF LARGE NUMBERS	—————	REACH + ASK
CERTIFICATION CLIFF	—————	FRICTION
UNACCOUNTABLE GHOST	—————	FRICTION + CONFIDENCE
LIAISON GAP	—————	FRAMING
MARCH TROUGH	—————	STRUCTURE
THE RETURN	—————	RELATIONSHIP

An empty shift does not always call for more recruitment

PEOPLE ARE GENEROUS

Every drop-off began with someone who had already shown a
desire to help

PEOPLE CARE, EVEN THOUGH THEY ARE BUSY

**Our work helps them make it all the way through the
door**

IF YOU TRACK ONE THING

762

SAID YES

—

475

ACTUALLY SERVED

62%

COMMITTED

ACTUALLY VOLUNTEERED

Track the journey, not only recruitment volume

QUESTIONS?

Take the tools home with you

RESOURCE PACKET + ONE RATIO TRACKER

- Volunteer journey diagnostic + 30 day action plan
- Tracking tools
- Message templates
- Role framing materials
- + first day checklist
- Other reference materials



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