

From Recruitment to Retention

VITA Volunteer Journey Resource Packet

Practical tools for programs of any size

**People are generous.
People are busy.**

Make the path from willingness to service easier to finish.



START HERE

One Ratio, reference numbers, diagnostic, and your next 30 days

THE TOOLKIT

Tracking, training, first shifts, role framing, recovery, pipelines, and feedback

HAND THESE TO OTHERS

A volunteer first-day checklist and adaptable role descriptions

MILLER WILBOURN

Senior Corporate Engagement Manager
Foundation Communities

Track one thing

A busy coordinator can use this section without reading the rest of the packet.

762 — **527** — **475**

COMMITTED CERTIFIED SERVED

62%

THE ONE RATIO

**Unique volunteers who actually served
divided by total volunteers who committed.**

This one measure contains the whole pre-service journey. When it changes, use the diagnostic to find which stage moved.

1

TRACK

Count committed, certified, and actually served.

2

LOCATE

Find the largest drop-off in the journey.

3

DIAGNOSE

Test ask, friction, framing, structure, or relationship.

4

CHANGE

Choose one realistic intervention and assign an owner.

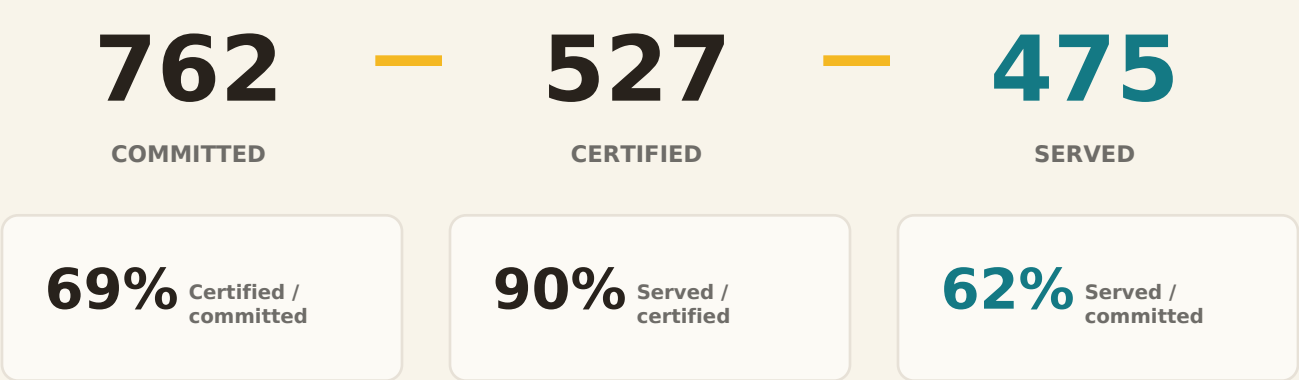
AT ANY SIZE

Three numbers in a spreadsheet are the whole tool. You do not need a database.

One season of reference numbers

Foundation Communities 2026 Tax Help figures, offered as a reference point rather than a standard.

PRE-SERVICE FUNNEL



ROLE COVERAGE



SEASONAL SCHEDULE



These measures do not all use the same denominator. Keep weekly scheduled volunteers separate from unique season totals.

Volunteer Journey Diagnostic

Part 1: recruitment through the first shift. Use the fill-in companion on page 6.

01 THE LAW OF LARGE NUMBERS

about 20,000 to 762 commitments

LOOK FOR

Too few appropriate prospects, weak segments, or an initial form that feels like onboarding.

ASK

Is the reachable pool large enough? Are asks segmented? Which form fields can wait?

FIRST MOVE

Maintain a tagged list. Send a focused ask. Make saying yes take only a few clicks.

02 THE CERTIFICATION CLIFF

762 committed to 527 certified

LOOK FOR

People commit, start training, and disappear before certification.

ASK

Where do they stall? Is the deadline visible? Can a real person help before they fall behind?

FIRST MOVE

Set a deadline. Remind people early. Hold one live help session. Name the support person.

03 THE UNACCOUNTABLE GHOST

527 certified to 475 served

LOOK FOR

Certified volunteers never schedule or complete a first shift.

ASK

Do they know what arrival looks like? Are they nervous? Is someone expecting them by name?

FIRST MOVE

Send a personal first-shift invitation. Provide a named greeter and permission to ask questions.

Volunteer Journey Diagnostic

Part 2: role coverage, seasonal troughs, and return. Use the fill-in companion on page 6.

04 THE LIAISON GAP

11-44% Client Liaison coverage

LOOK FOR

One role stays open while another role at the same site fills easily.

ASK

Is the role clear and valued? Does the title help? Did training make another role feel more prestigious?

FIRST MOVE

Rewrite the role around impact. State what the volunteer owns and what they do not need to know.

05 THE MARCH TROUGH

350 to 183 to 345 scheduled

LOOK FOR

A predictable date, holiday, or school calendar repeatedly damages coverage.

ASK

Can the dip be forecast? Which institution has people available then? Can a cohort fill it?

FIRST MOVE

Build one recurring pipeline with a class, employer, faith community, or student organization.

06 THE RETURN

Segment individuals and pipelines

LOOK FOR

Veterans disappear after the season, or a valuable cohort turns over every year.

ASK

Which people could return? Which partnership should return even when individuals cannot?

FIRST MOVE

Contact volunteers when you need nothing. Offer leadership. Renew institutional partnerships early.

Diagnose one drop-off

Fill-in companion to the Volunteer Journey Diagnostic on pages 4-5.

THE DROP-OFF I WANT TO EXAMINE

- ☐ **ASK** Are we asking for too much time, skill, information, or commitment at once?
- ☐ **FRICTION** Did we make the next step confusing, lonely, slow, or harder than necessary?
- ☐ **FRAMING** Does the opportunity feel unclear, intimidating, or less valuable than it is?
- ☐ **STRUCTURE** Does the program depend on individual heroics when it needs a pipeline or ongoing relationship?

EVIDENCE: WHAT DID VOLUNTEERS TELL US, AND WHAT CHANGED IN THE NUMBERS?

ONE CHANGE TO TEST

OWNER	START DATE	MEASURE TO WATCH

MAKE YES EASY

On a phone, can someone understand the role, time, training, and important dates, then commit in a few clicks? Move detailed onboarding questions until after yes whenever possible.

My next 30 days

Leave the session with four actions, not a packet full of good intentions.

ONE NUMBER I WILL BEGIN TRACKING

ONE DROP-OFF I WILL DIAGNOSE

ONE COMMUNICATION I WILL REWRITE

ONE INSTITUTIONAL PARTNER I WILL APPROACH

REVIEW DATE

ACCOUNTABILITY PARTNER

The One Ratio tracker

Four-row sample shown here; use the companion Excel workbook for the full-season log and automatic calculations.

475

served

/

762

committed

=

62%

SUPPORTING RATES

Certified / committed = 69%

Served / certified = 90%

Use supporting rates to determine which stage moved the overall committed-to-served result.

Week of	Committed (cum.)	Certified (cum.)	Scheduled this week	Unique served (cum.)	Decision or action

END-OF-SEASON CALCULATION

/

=

Unique volunteers served / total committed

COMPANION FILE

One_Ratio_Tracker.xlsx calculates the three rates and preserves weekly and season-total measures separately.

AT ANY SIZE

Three columns in a spreadsheet are enough: committed, certified, and actually served.

Define the funnel before counting it

A shared definition prevents the same number from meaning different things to different people.

Prospect	A person appropriate to receive a recruitment ask.	Count: Once in the prospect pool Use: Reach and segmentation
Committed	A person who explicitly says yes or submits the commitment form.	Count: Once per season Use: Top of the active funnel
Training started	A committed person who begins the required learning process.	Count: Once per season Use: Early training friction
Certified	A person who completes every certification required for the intended role.	Count: Once per season Use: Training completion
Scheduled volunteers	Distinct people scheduled to serve during a defined week.	Count: Once per person per week Use: Near-term staffing
Shift assignments	Filled shift slots. One person can fill several.	Count: Every assignment Use: Capacity and coverage
Unique volunteers served	Individual people who complete at least one shift during the season.	Count: Once per season Use: Committed-to-served KPI
Returner	A prior-season volunteer who reaches the current stage you specify.	Count: Once per season Use: Retention; always name the stage

WRITE THE DENOMINATOR INTO THE LABEL

Say '183 distinct volunteers scheduled that week,' not simply '183 volunteers.' Say whether a returner committed, certified, or actually served. Do not mix weekly scheduled volunteers with unique season totals.

AT ANY SIZE Write the definition beside the column header. Precision does not require a data team.

Training completion sequence

Page 10 gives the timing. Page 11 gives the matching message text.

01	Immediately after commitment	Confirm the decision	Thank them. Show the next three steps, deadline, and one support contact.
02	When access opens	Make entry easy	Send one direct link. Explain the course sequence and local model.
03	14 days before deadline	Create visibility	Remind everyone before they are late. Repeat the deadline and support route.
04	7 days before deadline	Offer live support	Invite volunteers to one troubleshooting session.
05	3 days before deadline	Use personal outreach	Contact people who have not progressed. Keep it brief and human.
06	Deadline day	Give one next action	State what remains. Include the exact link and support person's name.
07	2 days after deadline	Learn what blocked them	Call or text. Offer help, a revised plan, or a respectful off-ramp.
08	Within 48 hours of certification	Bridge to service	Invite the first shift while momentum is high. Name the greeter.

CORE PRINCIPLE

The reminder belongs before the deadline. A late reminder explains a failure. An early reminder may prevent one.

AT ANY SIZE

If you can only send two of these eight messages, send the 14-day and the 3-day.

Training communication templates

Replace bracketed details and keep each message focused on one next action.

COMMITMENT CONFIRMATION

Subject: You are in - here is what comes next

Hi [First name],

Thank you for volunteering with [program]. Your next step is to begin training at [link]. Please complete certification by [date].

You will also learn how our sites, roles, and workflow operate. You are not expected to figure this out alone. If you have questions or get stuck, contact [name] at [email or phone].

We are glad you are joining us.

14-DAY PRE-DEADLINE NUDGE

Subject: A quick certification check-in

Hi [First name],

Our certification deadline is [date]. Your next step is [specific step]. You can return to training here: [link].

If something is blocking you, reply and tell me where you stopped. We are holding a live help session on [date and time], and I am also happy to troubleshoot with you directly.

3-DAY PERSONAL FOLLOW-UP

Text or short email

Hi [First name] - I noticed you have not finished certification yet. Are you stuck on the material, short on time, or unsure about the next step? Reply with whichever is closest. I can help you make a plan, and it is also okay to tell me this season no longer works.

AT ANY SIZE

One clear deadline, one human contact, and one live help session create meaningful support.

Get them through the first shift

A first-shift invitation builds confidence. A disappearance response protects both the relationship and the data.

FIRST-SHIFT MESSAGE

Subject: Your first Tax Help shift on [day]

Hi [First name],

We are glad you are coming to [site] on [date and time]. When you arrive, ask for [greeter name]. They know it is your first shift and will get you situated.

Nobody feels completely ready for a first shift. You will not be alone, and we expect you to ask questions. Please bring [required items]. Parking and arrival details are here: [link or directions]. Reply if there is anything that would make arrival easier.

TEXT VERSION Hi [First name] - looking forward to seeing you at [site] on [day]. Ask for [name] when you arrive. They know it is your first shift and will help you get started. You will not be on your own.

WHEN A VOLUNTEER DISAPPEARS

Training stalled	Ask where they stopped. Offer one help session, one direct contact, and a revised deadline if appropriate.	Are you stuck on the material, short on time, or unsure what comes next?
Certified but unscheduled	Send a personal invitation with a site, date, named greeter, and permission to shadow.	You did the hard part. Can I help you choose a first shift?
Missed first shift	Lead with concern, confirm they are safe, restate cancellation expectations, and offer a new date.	We missed you today and wanted to check that you are okay.
No response after two contacts	Close the loop without shame. Mark the status accurately and leave a route back.	I will mark you inactive for now so you stop receiving reminders.

REASON CODES TIME | TRAINING | CONFIDENCE | LOGISTICS | FIT | NO RESPONSE

A respectful off-ramp improves the data and the relationship. 'Not this season' is more useful than silence and more recoverable than shame.

AT ANY SIZE One personal text message accomplishes most of the first-shift bridge.

Role framing before recruitment

A chronically open role may need a clearer identity, stronger support, or a better invitation.

WORKED EXAMPLE: CLIENT LIAISON

Help each client feel welcomed and keep the site moving. You do not need to prepare a tax return. We train you on the site flow, show you exactly what happens when a client arrives, and give you a person to ask when something is unclear.

ROLE NAME

Does the title communicate identity and value?

IMPACT

What fails, slows down, or becomes less welcoming without this role?

OWNERSHIP

What does the volunteer personally make possible?

BOUNDARIES

What does the volunteer not need to know or do?

SUPPORT

What training, shadowing, or on-site help will they receive?

STATUS

Does the role have a milestone, credential, leadership path, or recognition?

ONE-SENTENCE INVITATION

[Role] helps [people or site] by [specific contribution]. You do not need [common misconception]. We provide [specific support].

AT ANY SIZE

If one role is always open, examine the role and how people perceive it before recruiting harder.

Build the relationship beyond one shift

Individual retention and pipeline retention are different. Both improve when you listen and stay in contact.

BUILD ONE RETURNING PIPELINE

A cohort may change every year. The institutional relationship can still return. One instructor, employer, congregation, library, community center, student group, or professional association can become a recurring source.

PARTNER AND INTERNAL CHAMPION

RELIABLE COHORT SIZE

TROUGH OR NEED IT ADDRESSES

FIRST CONCRETE ASK

FEEDBACK THAT CHANGES THE PROGRAM

AFTER TRAINING

- How confident do you feel about your first shift? (0-10)
- Which part of training left you least prepared?
- What nearly prevented certification?

END OF SEASON

- How supported did you feel while serving? (0-10)
- Where did you feel confused, unprepared, or underused?
- What should we change before next season?

Close the loop: tell volunteers what changed because they spoke up.

CONTACT WHEN YOU NEED NOTHING

MAY	JULY	SEPTEMBER	OCTOBER	DECEMBER
thank-you and season impact	client story or program update	early returner check-in	first invitation to commit	training and deadline reminder

AT ANY SIZE

One instructor, employer, or congregation is a pipeline. For return, the May thank-you and September check-in matter most.

My first day at a VITA site

Volunteer-facing. Adapt role-specific items and local requirements before sharing.

BEFORE I LEAVE HOME

- ☐ I have the photo ID, signed volunteer agreement, and certification documents my program requires.
- ☐ I have my name badge, volunteer ID, usernames, passwords, and multi-factor authentication device if required.
- ☐ I know the address, parking or transit plan, entrance, shift time, and whom to contact if delayed.
- ☐ I reviewed the health, safety, confidentiality, and cancellation expectations for this site.

WHEN I ARRIVE

- ☐ I introduced myself to the site lead and checked or clocked in.
- ☐ I met the greeter, buddy, or experienced volunteer supporting my first shift.
- ☐ I located restrooms, water, supplies, emergency exits, and the place for personal items.
- ☐ I know how to request language access, accessibility support, or staff help.
- ☐ I understand the first 15 minutes and whom to ask before making an uncertain decision.

ROLE-SPECIFIC CHECKS

IF I PREPARE OR REVIEW RETURNS

- ☐ I shadowed before working independently.
- ☐ I can access the software and required resources.
- ☐ I know where the queue, printer, forms, and alerts live.
- ☐ I know when to pause and request quality review.

IF I WELCOME OR INTAKE CLIENTS

- ☐ I understand sign-in, forms, queues, and drop-off procedures.
- ☐ I know how to respond to missing identification or documents.
- ☐ I know how to request eligibility, disability, or language help.
- ☐ I know where completed materials go next.

BEFORE I LEAVE

- ☐ I checked or clocked out and confirmed that client work was handed off correctly.
- ☐ I shared anything confusing or difficult with the site lead.
- ☐ I know my next shift or how to schedule it.

Sample VITA volunteer role description

Publishable model. Replace every program-specific requirement before using it.

VOLUNTEER TAX PREPARER

Help neighbors file accurate tax returns and claim the credits they have earned. Work directly with clients, use tax-preparation software, and serve on a team that checks every return for quality.

TRAINING About 7-10 hours plus required IRS certification

SERVICE About one 3-hour shift per week during tax season

SCHEDULE Choose from available sites, days, evenings, or weekends

SUPPORT Training help, shadowing, site leadership, and quality review

WHAT YOU WILL DO

- Complete training and required certification.
- Prepare returns within your certified scope.
- Explain the return and answer client questions.
- Protect privacy and follow program procedures.
- Ask for help and route every return through quality review.

WHAT IS NOT REQUIRED

- Prior tax-preparation experience.
- Knowing every answer before the first shift.
- Working outside your certification or comfort level.
- Handling uncertain situations without help.

CLIENT LIAISON INVITATION LANGUAGE

Help each client feel welcomed and keep the site moving. You do not need to prepare a tax return. We train you on site flow, show you exactly what happens when a client arrives, and give you a person to ask when something is unclear.

FOLLOW UP

Miller Wilbourn	Senior Corporate Engagement Manager	Miller.Wilbourn@foundcom.org
Bella Cheng	Volunteer Engagement Manager	Bella.Cheng@foundcom.org
Dray Sears	Volunteer Coordinator	Dray.Sears@foundcom.org

People are generous. Make the path easier to finish.

Built from Foundation Communities 2026 Tax Help tracking, the 2026 Deep Dive report, and volunteer-engagement materials. Adapt every tool to IRS requirements and your local program.