



FREE VOLUNTEER PLAYBOOK

Fundraising Event Volunteer Playbook

Build a confident, well-prepared volunteer team for your fundraising event. Define nine key roles, recruit the right people with ready-to-use outreach scripts, and get everyone event-ready with a briefing that takes just fifteen minutes.

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How to Use This Playbook

Technology can help make a fundraising event run smoothly, but it's the people who bring it to life. When your volunteers feel confident, supported and appreciated, they help create the kind of experience supporters remember.

The work that makes that happen is mostly done before event day, and most of it is writing: role descriptions, an ask, a briefing, a roster. This playbook gives you all four. Anything in [square brackets] is for you to complete.

You'll Find

- 1 **Where to look beyond your usual volunteers**
- 2 **Nine roles, defined and ready to advertise**
- 3 **A role advert template and a personal ask script**
- 4 **A fifteen-minute briefing checklist**
- 5 **A three-stage communication plan**
- 6 **A roster, and the feedback questions to ask afterwards**

What Makes Someone Say Yes

- ✓ **A role, not a need.** People step forward when they can picture themselves doing the job. "Help on the day" is not a role.
- ✓ **A personal ask.** A direct request from someone they know and trust outperforms any post or email campaign.
- ✓ **A known commitment.** A two-hour registration shift with full training feels very different from an open-ended day.
- ✓ **The promise of training.** Most hesitation is a quiet worry about looking foolish in front of people.
- ✓ **A named person to report to.** Knowing who to ask removes the fear of being stranded.
- ✓ **Work they will actually enjoy.** Ask what people like doing rather than assigning roles at random.

STEP #1

Start Earlier Than Feels Necessary

The most common mistake is leaving recruitment to the final few weeks. By then people have committed elsewhere, and you are choosing from whoever is left. Begin as soon as the event date is confirmed, which gives you time to fill specialist roles, train people properly, and replace anyone whose plans change.

When	What to do
The day the date is confirmed	Start recruiting. Write your role descriptions before you advertise anything
Early	Advertise specific roles, never a general call for event volunteers
Early	Ask personally for anything specialist, and for anyone you particularly want
Ongoing	Keep recruiting a small buffer, so one change of plans does not leave a gap
About a week before	Send the final schedule, with shifts, reporting lines and dress
The day before	Send a short reminder: arrival time, parking, dress and an emergency contact
On the day	Let everyone practise on the technology before the first guest arrives

Look Beyond Your Usual Few

Leaning on the same committed handful every year eventually produces fatigue. Every event is a chance to widen the circle, and some people who are not ready to give funds are very happy to give time.

Where to look	Why they say yes	How to ask
Past supporters	They already believe in the cause	A personal message from someone they know
Last year's attendees	They have seen what the night actually is	At the thank-you stage, while it is fresh
Parents and families	A direct stake in the outcome	Through the newsletter, with named roles
Corporate partners	Team volunteering is a benefit they often want	Through your existing contact, as a team day
Sporting and community clubs	Reciprocal, and they arrive as a group	Committee to committee
Universities	Students want real event experience	Through a faculty or student union noticeboard
Local businesses	Visibility and community standing	The same conversation as your item ask

STEP #2

Define the Roles First

You cannot advertise a role you have not written down. Fill in how many you need of each, then advertise them by name.

Role	What they do	Guest-facing	Typical shift	How many
Welcome and registration	Greet arrivals, check people in, hand over anything they need	Yes	2 hours from doors	[]
Roving floor support	Help people bid on their phones, answer questions, keep energy up	Yes	Through dinner	[]
Raffle selling	Sell tickets table by table, including for cash	Yes	Pre-dinner and on	[]
Item preparation	Photograph, describe and load auction items beforehand	No	Flexible, in advance	[]
Live auction spotting	Identify bidders in the room for the auctioneer	Yes	20 to 30 minutes	[]
Paddle raise recording	Record pledges against records as the MC works the room	Yes	15 minutes	[]
Checkout support	Help people complete payment before they leave	Yes	The last hour	[]
Setup and pack down	Room, signage, QR codes, tables	No	2 hours either side	[]
Logistics and admin	Rosters, catering liaison, supplier contact	No	In advance	[]

Some people thrive in guest-facing roles and others are far happier preparing items or running logistics. Both are essential, and matching people to what they enjoy is what makes them volunteer again.

STEP #3

Make It Easy to Say Yes

Most hesitation is uncertainty about what is involved. Remove it and the answer changes.

The Role Advert

Use this anywhere you advertise: newsletter, social, noticeboard, parent app.

[Role name] at [Event name]

What you would do: [one sentence, in plain language]

When: [date], [start time] to [finish time], which is about [number] hours

Where: [venue]

Training: [what you will get, and when]

You would report to: [name]

No experience needed. [Or: this one suits someone comfortable with a phone or tablet.]

Interested? Reply to [name] on [contact].

The Personal Ask

For specialist roles, and for anyone you particularly want. Say it or send it, but make it from a person rather than the organisation.

"Hi [name], we are running [event name] on [date] and I am putting the team together. I thought of you for [specific role], because [genuine reason]. It is about [number] hours, from [start] to [finish], and we will train you on the night before anyone arrives. Would you be up for it?"

Four things do the work there: the named role, the reason you thought of them, the hours, and the promise of training. Between them they answer almost every hesitation someone has.

STEP #4

Brief Them Into Confidence

Good training is not about covering every possible scenario. It is about making people feel confident. Fifteen minutes done properly beats an hour of detail nobody retains.

- ☐ Walk through the event schedule, start to finish
- ☐ Explain the guest journey, so they know what a supporter actually experiences
- ☐ Cover the questions they are most likely to be asked
- ☐ Let them practise on the technology before anyone arrives
- ☐ Name the person they escalate to, and make sure that person knows
- ☐ Confirm breaks, and when they happen
- ☐ Confirm arrival time, parking and what to wear
- ☐ Tell them what the event is raising funds for, in one sentence

The fastest confidence builder: hands on the actual device, doing the actual task, before the first guest walks in. A simple platform shortens this dramatically, which means volunteers spend the night with supporters instead of troubleshooting.

STEP #5

Communicate in Stages

One long email containing everything is the same as no email. Send three shorter ones instead, each with a single job.

When	What to send	What it must contain
Well in advance	Shift confirmation	The role, the date, the hours, and a clear request to confirm yes or no
About a week before	The final schedule	Full running order, their shift, who they report to, and what to wear
The day before	A short reminder	Arrival time, parking, dress and an emergency contact. Nothing else

Recognise Them Before, During and After

Retention starts with appreciation, and appreciation during a busy shift lands harder than a thank-you a week later.

When	What to do
Before	Confirm you are glad they are coming, and name the role they are filling
During	Check in mid-shift. Thank them in the moment, not only at the end
Straight after	Tell them what was raised, and what those funds will do
Straight after	Pass on any positive feedback from attendees, especially about their part of the night
Within a week	Ask for their feedback while the experience is still fresh

YOUR ROSTER

Who Is Doing What

One page, circulated to everyone. Most event-day confusion is a roster that lived in one person's head.

Name	Role	Shift	Contact	Briefed	Thanked
[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]

Ask These Five Afterwards

- ☐ What worked well in your role?
- ☐ What slowed you down?
- ☐ What did guests ask that you could not answer?
- ☐ What would you change about the briefing?
- ☐ Would you do it again, and in the same role?

Volunteers routinely spot simple improvements that organisers never see, because they are standing where the guests are.

PRO TIPS

Tips for a Team That Comes Back

- ✓ **Start the day the date is confirmed.** Not the month before.
- ✓ **Advertise the role, not the need.** "Help on the day" is not a role.
- ✓ **Ask personally for anything specialist.** A direct ask beats any post.
- ✓ **Let them practise before doors open.** Fifteen minutes hands-on beats an hour of explanation.
- ✓ **Ask what people enjoy.** Rather than assigning roles at random.
- ✓ **Thank them during, not just after.** A word mid-shift is worth more than an email next week.
- ✓ **Tell them the total.** It connects their shift to the cause, which is why they came.

Less Training, More Time With People

Raise more, stress less. The simpler the platform, the faster volunteers get confident, and the more time they spend with supporters:

- ✓ Volunteer accounts, so your team can bid, buy and donate on behalf of supporters (available on selected plans)
- ✓ Guest check-in by name search, or by scanning ticket QR codes
- ✓ A Checkout Console that searches by guest name, item name or item number
- ✓ Funds go straight to your own account. GalaBid never touches them

Real fundraising experts, not chatbots. Trusted by fundraisers since 2011.

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