This optional worksheet can help State Health Insurance Assistance Program (SHIP) volunteer coordinators plan and track volunteer recruitment activities.

1. [Define the role](#_Define_the_Role) you want your volunteers to fulfil

What skills and experience are required? What is the time commitment?

1. [Identify your target audience](#_Identify_Your_Target)

What type of people do you want to target as potential volunteers (students, retirees, professionals in a specific field)?

1. [Determine the recruitment channels](#_Determine_Your_Recruitment) you want to use

Where can you find potential volunteers? (Social media, community groups, your website, etc.)

1. [Set a recruitment timeline](#_Timeline)

Establish when you want to start and end this specific recruitment effort. Consider any important events or deadlines that may conflict.

1. [Develop a recruitment message](#_Recruitment_Message)

Your recruitment message should be clear, concise, and compelling. This message should communicate why it’s important to volunteer with your organization and its benefits.

1. [Develop a recruitment strategy](#_Recruitment_Strategy)

After determining what channels you want to use, create a plan for reaching out to potential volunteers.

E.g., social media posts, targeted emails, outreach events, etc.

1. [Evaluate and refine](#_Track_and_Evaluate)

Regularly evaluate the effectiveness of your recruitment efforts. What can be improved?

# Define the Role

The first step into a successful recruitment plan is to define what roles you are looking to fill in your volunteer program. Take some time to think about the needs of your program. Set goals about the type of volunteer role you’re looking to fill, how many volunteers you need to successfully meet your program needs, and what kinds of skill sets your potential volunteers should have. Use the below space to write out our thoughts:

**GOAL: To recruit \_\_\_\_\_\_\_\_\_\_\_\_ volunteers between \_\_/\_\_/\_\_ and \_\_/\_\_/\_\_ including:**

**Common Volunteer Roles # to recruit**

Information distributor \_\_\_\_\_\_\_\_\_

Administrative support \_\_\_\_\_\_\_\_\_

Exhibitor \_\_\_\_\_\_\_\_\_

Presenter \_\_\_\_\_\_\_\_\_

Counselor \_\_\_\_\_\_\_\_\_

Complex interactions specialist \_\_\_\_\_\_\_\_\_

**Other Volunteer Roles # to recruit**

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_

**Location(s):** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ (city, county, remote, etc.)

**What skills and experience do our new volunteers need to have:**

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# Identify Your Target Audience

Now that you’ve established what your program needs are, take some time to think about who your ideal volunteer is for the roles you’ve established above.

**Who is your target audience?**

**What are their motivations for volunteering?**

**Who currently volunteers in these roles?**

# Determine Your Recruitment Approach

It’s time to consider what resources you’re going to use to help spread your recruitment message. Identify newspapers, newsletters, television stations, radio stations, websites, social media sites, and community billboards that can help you advertise SHIP volunteer opportunities. Here’s a list of a few ideas to consider:

VolunteerWisconsin

VolunteerMarch

Social Media (Facebook, Instagram, YouTube)

Organization Website

Newsletters

Outreach/Community Events

Print Media

Articles

Editorials

Advertisements

Press Releases

Other:

# Timeline

While recruitment is often an ongoing effort, establishing a timeline for your recruitment plan can help you track and evaluate the effectiveness of your recruitment methods (more information on this is available below). Consider how much time you have available to realistically dedicate to your recruitment plan. Are there any upcoming events that may impact your recruitment plan, either positively or negatively?

Beginning date:

End date:

Dates of upcoming events:

Dates of upcoming [volunteer training webinars](https://gwaar.org/medicare-outreach-and-assistance-resources):

# Recruitment Message

What are you going to say to draw potential volunteers in? “Volunteers Needed” won’t be sufficient, especially in terms of recruiting SHIP volunteers. When developing a recruitment message, be sure to **avoid jargon**. Your message should be **easy to understand, clear, and concise**. Resources for developing a recruitment message are available on the [Volunteer Management Resources SharePoint page](https://share.health.wisconsin.gov/ltc/teams/ADRC/SitePages/Volunteer%20Resources.aspx).

How can you show the **impact** your volunteers make? What specific examples can we to show the positive impact our organization has?

What are the **benefits of volunteering** with your organization? (E.g., skill development, networking opportunities, personal and professional goals, etc.) What is your **call to action**?

# Recruitment Strategy

Take the recruitment approaches that you’ve chosen to use from above and fill them into the first column of the chart. Determine which products/tools you’re going to use or develop for those approaches and the frequency with which you will use them. Laying out all of your recruitment approaches this way will help you visualize your strategy to ensure that collectively your approaches help spread your message and are well spread out over your timeline.

| **Approach** | **Acquire or develop products to promote SHIP volunteer opportunities** [type, source(s), quantity] | **Frequency /  Date completed** | **Notes** |
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# Track and Evaluate

Once you have collected data for the period of time that you determined in [step 4](#_Timeline), analyze the results to determine which methods are most effective in attracting and retaining volunteers. Identify trends, patterns, and outliers in the data to help inform your recruitment strategy going forward. Adjust your recruitment strategy based on your analysis to focus on the most effective methods.

| **Approach** | **Goals** (number of responses, applications, new volunteers, etc.) | **Results** | **Notes** |
| --- | --- | --- | --- |
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