

## Walk to Cure Arthritis Volunteer Led Events Team Retention & Development Playbook

### Why Do We Need a Retention Strategy?

- Retaining teams is essential to the growth and success of every Walk to Cure Arthritis event.
- The number one success factor impacting WTCA revenue is the retention of committees, teams, and team members.
- Returning teams raise more than new teams.

### Retention Strategy

#### 1. Recruit a Team Retention Sub-Committee

- a. The team retention sub-committee should have one member for every 10 teams participating in your event. Their role should focus on encouraging teams to return for the next season. Remember, the best way to retain a team is to provide them a great experience at their current year's event so they will want to return again and again. Everything you do during the season has a potential impact on their desire to return year after year.

#### 2. Build a team retention plan

- a. Build a team retention prospect list (last year's team and teams not returning from the past three years)
- b. Prioritize information by categories:
  - i. High Priority Teams – Top teams that performed above the baseline fundraising goal for your event or that have multiple teams at your event (i.e. top 10/25/50 teams or teams that raise 75% of the income)
  - ii. Priority Teams – Teams that performed right where you asked them to but have potential to become High Priority teams
  - iii. Opportunity Teams – These are your new teams and any returning teams with lots of potential but did not reach their recruitment and/or fundraising goal
  - iv. Maintenance – teams that return each year, but only recruit 1-4 people. They have been vetted for opportunity.
- c. Schedule personal contact and enter the information in your event planning tool. Contact with teams should be varied and should include personal visits, phone calls, and emails. Each person you are retaining should have a personal communication from your committee volunteers at least four times per year.  
*Sample on next page*

#### 3. Implement plan and record results

Who	When	What	Why
Top Team Captains <i>(e.g. Teams that raise 75% of the income)</i>	October	Personal visit	Thank them for their participation this year, gauge interest, and confirm returning/not returning next year.

Other Team Captains	November	Personal Phone Call	Thank them for participation this year, gauge interest, and confirm returning/not returning.
All Team Captains	January	Personal Phone Call	Invite them to the kickoff event.
All Team Captains	February	Kickoff event	Thank top teams – present up to date AF and event information – remind them how the money they raised is making a difference and make them feel special.
All Team Captains	February	Personal Phone Calls or visits	Team Mentoring Calls – if they are doing well, ask them about their success and if there is anything you can do to help them.
All Team Captains	March	Card	Thank them. Remind them how much their support is making a difference.
All Team Captains	April	Email	Thank them for their involvement. Offer your help/support if needed.
All Team Captains	Two weeks before event	Personal Phone Call	Answer any questions they have about the upcoming event.
Top Team Captains	At event	Team Tailgate & verbal recognition from stage	Signage at their tent. Call out the top teams from the stage during the program
All Team Captains	One week after event	Holiday card	Thank them for their involvement.

## Scripts

The following call scripts are designed as guides to help volunteers and staff make team development calls throughout the year. While parts of the scripts can be followed verbatim, we encourage you to make them your own using personal stories and words from the heart so that the caller is comfortable with the tone and content of the phone call and conversation. Don't forget to reiterate how the money and support raised through Walk to Cure Arthritis helps the Arthritis Foundation find better treatments and a cure.

### First Call to Team: 7 to 9 Months Prior to Event

#### Registered Teams

Hi. This is \_\_\_\_\_ and I am a committee member for the Arthritis Foundation's Walk to Cure Arthritis in [CITY]. I am calling to thank you for joining us again for this year's event and to remind you that our kickoff will be on [insert date and time at insert location]. We really hope you or someone from your team will be able to attend to hear all the great things we have planned for Walk this year! Can you join us? Do you have any questions for me? Is there anything else we can do to make your experience great this year? Thank you again for your support and the difference you are helping make in the fight against arthritis.

#### Teams Not Registered

Hi. This is \_\_\_\_\_ and I am a committee member for the Arthritis Foundation's Walk to Cure Arthritis in [CITY]. I am calling to thank you for your leadership in serving as a Team Captain last year and we'd be honored to having you join us again at Walk this year! Will you be able to join us?

**If no:**

Do you mind if I ask why? *Take note of reason, offer the opportunity for them to provide additional feedback about our event and how we can make it better, thank them and say goodbye.*

**If yes:**

We are thrilled to have you back! Will all of your team members be participating again?

- (This is an important question to ask. They may be losing half their team or have gained 15 new people). Remember to remind them how their involvement makes a difference and how the Arthritis Foundation uses the money they raise.

Wonderful! The kickoff is scheduled for \_\_\_\_\_ at \_\_\_\_\_ p.m. I hope you or one of your team members will be able to be there. Is this the best way to reach you? If you have any questions in the meantime, please feel free to contact me. *[Provide your contact information]*

**Team Development Call #2**

Following the Kickoff

1. Hi, \_\_\_\_\_. This is \_\_\_\_\_, calling on behalf of the Arthritis Foundation Walk to Cure Arthritis in [CITY].
  - a. **If attended kickoff** – Thank you so much for attending last week's kickoff event. That closing speaker was awesome, wasn't he/she?
  - b. **If did not attend kickoff** – We missed you at last week's kickoff. Has anyone filled you in on the meeting yet? *[Share highlights from the meeting.]*
2. **Already Registered** – I see that your team has already registered for this year's event. Thank you so much for taking the time to do that.
3. **Not Registered Yet** – I don't see your team registered for this year's event yet. Do you need any assistance getting signed up?
4. **Gauge level of participation/engagement. Elaborate based on historical knowledge if possible. Offer assistance if necessary. Choose from some of the questions below.**
  - a. "How are you feeling about your team and this year's Walk? Is there anything we can do to better support you?"
  - b. "How is building your team going? Did you know that teams that honor someone with arthritis raise more than those that don't? Talk to your friends, family, and colleagues, and ask them if there's someone they'd like to fundraise in honor of. Chances are that someone you know has been affected. Ask them to join your team."
  - c. If you haven't already, we encourage you and your team members to invite several people with arthritis to join your team and consider dedicating your efforts in their honor."
  - d. "Do you have any big fundraisers planned? I know you were one of the top teams last year, how's fundraising going so far this year?"
  - e. "Does your team need any help putting together a fundraising plan or need any fundraising ideas? Be sure to remind all your donors and potential donors about how the money they contribute helps the Arthritis Foundation find better treatments and a cure. Do you need any help with communicating that message and how we are helping to conquer arthritis?"
  - f. "Do you have any questions or is there anything else I can help you with?"

5. Thank you so much for being part of our Walk to Cure Arthritis family. We could not have the impact we are making without you and your team members.

### Team Development Call # 3

For teams that still have not registered and for those that registered since the last call

1. Hi \_\_\_\_\_. This is \_\_\_\_\_, calling on behalf of the Arthritis Foundation Walk to Cure Arthritis in [CITY].
  - a. **Already Registered** – I see that your team has already registered for this year's Walk to Cure Arthritis. Thank you so much for taking the time to do that.
  - b. **Not Registered Yet** – I don't see your team registered for this year's Walk. Do you need any assistance getting signed up?
2. **Gauge level of participation/engagement. Elaborate based on historical knowledge if possible. Offer assistance if necessary. Choose from some of the questions below.**
  - a. "How are you feeling about your team and this year's Walk?"
  - b. "How is building your team going? One area that we're really trying to focus on this year is engaging more people in the community, specifically on teams. If you haven't already, we encourage you and your team members to invite several new people to join your team and walk with us for the first time."
  - c. "Do you have any big fundraisers planned? I know you were one of the top teams last year, how's fundraising going so far this year? Do you need any help explaining to your donors and potential donors about how the money you raise helps the Arthritis Foundation find better treatments and a cure?"
  - d. "Does your team need any help putting together a fundraising plan or need any fundraising ideas?"
  - e. "Do you have any questions or is there anything else I can help you with?"
3. Thank you so much for your participation in Walk to Cure Arthritis. We are so grateful for all you and your team are doing to help us finish the fight.

### Team Development Call #4

All Team Captains: Two weeks before event

1. Hi \_\_\_\_\_. This is \_\_\_\_\_ calling on behalf of the Arthritis Foundation Walk to Cure Arthritis in [CITY].
2. **Gauge level of participation/engagement. Elaborate if possible. Offer assistance if necessary.**
  - a. How has everything been going since we talked last?
  - b. I see that your team is just about \$1,000 away from your fundraising goal. You are doing an awesome job. Any big plans to blow that goal out of the water between now and the event? Is there anything I can do to help you exceed that goal?
3. **Provide last minute meeting/logistical information.**
  - a. I know it's hard to believe, but the event is just 2 weeks away. We'll be collecting any outstanding money you may have received at next week's Bank Day [*if applicable*]. Are you planning on attending?
  - b. I did want to remind you about a few changes to the event set-up this year. Team Tailgate is [insert details]., parking in [insert details], opening ceremonies are [insert details], etc.
  - c. Do you have any questions or is there anything else I can help you with?
4. We really appreciate all that you've done to lead your team to success this year. It's because of passionate volunteers like you that we are making significant progress in the fight to end arthritis and we can't thank you enough for your time and dedication. We look forward to seeing you at the event in two weeks!