

Strategic Volunteer Engagement Project Planning Worksheet

Engaging and managing volunteers is a resource-intensive activity in any nonprofit organization. Use this worksheet to brainstorm about the most strategic use of volunteers for your organization. Need more help? Email me at perry@radphilanthropy.com for a free consult to help get you started.

Know Yourself

The identity of your organization and your constituents will help you set the stage to create compelling and impactful volunteer programs. Use this section to get clear on the purpose of your work.

Organization and/or team-specific mission statement:

Organization and/or team-specific values:

What is the personality of your organization, and how does that reflect the people you serve?

What other attributes of your constituents or orgs are important to consider?

Finding Your Way

To figure out how to use volunteers, you need to be clear on what problems volunteers will solve or what goal/s these volunteer programs will help you meet. Defining this criteria at the outset ensures that your plan will fit your needs.

The best way to use volunteers would accomplish these things or meet these goals:

Create a Project Map

Once you've identified what goals a strategic volunteer program would support, you can design a project map that helps you collect the information you need to find the answers to the problems your volunteer programs will solve.

What are the steps you need to take, in which order, to collect and synthesize the necessary information for your evaluation?

Including Stakeholders and Multiple Perspectives

Because you are trying to get people (volunteers) to take an action (your strategic programs), it's critical that you create an inclusive process during your project.

Who would your potential volunteers be? How can you solicit their feedback and interest in strategic programs?

Who are the program managers, internal stakeholders, or specialists whose feedback you also will need to collect?

How will you solicit feedback in such a way that allows people with varying perspectives and experiences to share openly?

Information Discovery

Be thoughtful about how you will collect your feedback.

What methods will you use to collect and analyze the information you are gathering in this project?

How will you synthesize those findings into a coherent strategy?

Deliver Your Findings

You must deliver your findings so that everyone who helped along the way knows the value of their contribution and so that you can create buy-in for the changes to come.

How will you format your findings and share them with relevant stakeholders?

What is the answer to the fundamental question: What is the right way for my organization to work with volunteers?

Create a Volunteers Operating Plan

If you don't create a clear plan with a timeline and definition of activities, your strategy will never go beyond being a good idea.

How will you work with stakeholders to take your findings and create a plan of action for your strategic volunteer programs?

How will you create accountability to execute that operating plan?
