Volunteer Program Planning

Step by Step

Follow these steps to develop or expand a volunteer program at your organization.

1. Clarify the Why.
2. Map Out the How.
3. Define the What.
4. Identify the Who.
5. Determine the When.

1. Clarify the Why.

TO CONSIDER:

- Does your organization need a volunteer program?
- What do you want to achieve by engaging volunteers in this way? Answers might include:
  - Expanding reach
  - Engaging community
  - Bringing in new ideas to the organization
  - Building leadership capacity
  - Increasing clients served

TO DO:

- Create a vision statement for your program.
- Build buy-in.
  - Speak with your supervisor, board, or leadership.
  - Design an organizational chart to demonstrate where the volunteer program integrates with the organization

2. Define the What.

TO CONSIDER:

- Which needs can be addressed by volunteers?
- What programs or roles (for both volunteers and relevant staff) should be developed?
- Which should be developed first?

TO DO:

- Assess both externally and internally.
  - Confer with peers at other organizations.
  - Conduct an internal SWOT analysis.
  - Connect with communities of practice.
Define the volunteer roles.
- Develop position descriptions.
- Engage colleagues in developing volunteer position descriptions.

3. Map Out the How.

TO CONSIDER:
- What will the lifecycle of the volunteer be?
  - How does a volunteer go from someone interested in the position to an engaged volunteer at our organization?
- What is the desired volunteer experience?
- What resources do we need to make this happen (technology, funding, policies, etc.)?

TO DO:
- Define the volunteer roles.
  - Develop position descriptions.
  - Engage colleagues in developing volunteer position descriptions.
- Plan the volunteer lifecycle.
  - Develop a flow chart of the volunteer lifecycle, including entrance and exit points as well as check-ins
- Build the infrastructure.
  - Develop engagement plans (e.g., recruitment plan, screening policies, onboarding plan, training plan, evaluation)
  - Develop the resources needed to implement that flow chart and create the desired engagement experience (e.g., application, database/constituent management system, handbook, training, recognition policy, budget, space, etc.)
  - Define metrics for success and establish ways to track those metrics.
  - Involve other staff to assess feasibility of plans and their capacity.

4. Identify the Who.

TO CONSIDER:
- Who needs to collaborate on the work?
- Whose support is vital?
- Who needs to be kept informed?
- Do all involved know their roles and responsibilities?
- Do all involved know their roles and responsibilities?

TO DO:
- Involve others in the process.
  - Confirm roles and responsibilities with all involved staff.
  - Develop a reporting system to leadership on progress and impacts.
5. Determine the When.

**TO CONSIDER:**

- What is most pressing?
- What will create momentum for future success?
- When can we get started?
- How will we check in along the way?
- How will we measure success?

**TO DO:**

- Complete a work plan.
  - Define the timeframe.
  - Define priorities to pilot.
  - Plan for ongoing evaluation.
  - Confirm metrics for success/evaluation with staff involved in program.

- Determine the triggers for scaling up (e.g., accomplishing initial metrics for success, readiness of another program, department, or site to begin engaging volunteers).