

VOLUNTEER STRATEGY SUCCESSPATH™ GUIDE

Use this guide to assess where you are at now and to track your progress in developing a transformational volunteer strategy that gets results.

The VolunteerPro Volunteer Strategy SuccessPath™ 2021

Years in the making, our bespoke members-only pathway details the key steps you need to take to transform your volunteer strategy from fundamental to a fully mature approach. These steps are the key to mobilizing high-impact volunteer talent that brings about results for your good cause. Feel free to add items specifically related to your impact area.

All VolunteerPro training content is developed around these five stages, and you will find tools, templates, training – and more! – to complete the action items inside our community resource library. Use this guide to pinpoint where you need to focus time and attention and track your progress through three levels of capacity – Early Stage, Adapting, and Mature.

Remember ... you don't have to get it all done at once. Start where you can get the most traction, and celebrate your progress!



Phase ONE: ENVISION THE FUTURE (Not This, But That)

Focused Intention, the Miracle Mindset, & a Smart Plan to Support Your Program Goals

In this phase, you are gaining clarity on your vision for volunteer engagement, its current state, and how it can better align with your agency's goals and objectives. This is a critical phase because it paints a picture of the promise of what is possible when it comes to volunteer engagement at your agency. You're also reflecting on your own leadership philosophy, which will set the stage for future decisions and actions.

	Capabilities	Milestones	Action Items
Level 1: Early Stage	Ready to build out foundational elements of strategy; able to ask others for focused ideas & input	<ul style="list-style-type: none"> • You have an enabling mindset that gives you hope and guides your leadership philosophy. • You know your volunteer program's strengths, problems, opportunities, and threats, & how to convert strengths and problems into opportunities & how to address threats. • You know what personal values drive your work and know how to describe what you stand for. 	<input type="checkbox"/> Personal Values Clarification Worksheet <input type="checkbox"/> Miracle Mindset Worksheet <input type="checkbox"/> SPOT Matrix Worksheet <input type="checkbox"/> Leadership Self-Reflection & Planning Worksheet
Level 2: Adapting	Able to reflect upon & adapt strategies for greater results; able to share progress with others	<ul style="list-style-type: none"> • Your organization has a commitment to community statement that states the value volunteers provide to your organization. • The goals of your volunteer program align with organizational goals and you involve volunteers to support those goals. • You can calculate the volunteer workforce you will need to reach agency and department goals. 	<input type="checkbox"/> Commitment to Community Statement Worksheet <input type="checkbox"/> Program Needs Assessment Workbook <input type="checkbox"/> Roles for Goals Worksheet <input type="checkbox"/> Growth Goals Spreadsheet
Level 3: Mature	Clear which management interventions are most likely to bring about which strategic results; able to teach others best practices	<ul style="list-style-type: none"> • You know where gaps exist in meeting your organization's goals and can define the functions, components and tasks each department at your organization is responsible for and how volunteers can fill in roles to help. • You have a full plan for volunteer roles and how and when they will be filled at your organization & your organizational leadership and staff who will be working with volunteers are on board with the plan. • You have a volunteer program budget that supports engagement, supervision, appreciation, and retention activities. 	<input type="checkbox"/> Volunteer Staffing Plan Template <input type="checkbox"/> Volunteer Placement Agreement <input type="checkbox"/> Chart of Accountabilities Spreadsheet <input type="checkbox"/> Budget Planning Spreadsheet



Phase TWO: BUILD THE FOUNDATION (Program Development)

Essential Program Development Elements to Support Long-Term Success

In this phase, you are building the essential blueprint that will guide the implementation of your volunteer strategy. While these elements may evolve over time, they should offer a clear picture of standard operating procedures and should guide the actions of volunteers and employees. These elements should be reviewed by and approved by agency leadership.

	Capabilities	Milestones	Action Items
Level 1: Early Stage	Ready to build out foundational elements of strategy; able to ask others for focused ideas & input	<ul style="list-style-type: none"> • You have a documented system for screening and welcoming volunteers. • Your organization has a volunteer handbook that guides volunteer involvement at your organization. • You have volunteer software to help manage scheduling. • You have a plan for volunteer roles. 	<input type="checkbox"/> Current Volunteer Policy Review Checklist <input type="checkbox"/> Volunteer Onboarding Journey Map Template <input type="checkbox"/> Volunteer Position Description Template
Level 2: Adapting	Able to reflect upon & adapt strategies for greater results; able to share progress with others	<ul style="list-style-type: none"> • You've developed outcome indicators that help you track the progress of volunteers and demonstrate accountability for results. • You have a volunteer management software that helps you manage every aspect of the volunteer lifecycle. • You have a plan and tool in place to collect, track, and store volunteer data. • You've prioritized risks, have chosen strategies, and created a written plan to manage risk. 	<input type="checkbox"/> Volunteer Engagement Cycle Worksheet <input type="checkbox"/> Logic Model Template <input type="checkbox"/> Outcome Metrics Worksheet <input type="checkbox"/> Software Requirements Planning Worksheet <input type="checkbox"/> Quick Risk Assessment Worksheet <input type="checkbox"/> Risk Management Plan Template
Level 3: Mature	Clear which management interventions are most likely to bring about which strategic results; able to teach others best practices	<ul style="list-style-type: none"> • You've developed an operational plan for growth, changes, and maintenance of your volunteer program. • You have developed policies & procedures for volunteers, and they have been approved by your HR/legal team. • You've clarified areas of accountability and authority, and all staff knows their role in volunteer engagement and owns volunteer results. • You have an evaluation plan in place to ensure volunteer services is meeting its goals. 	<input type="checkbox"/> Volunteer Operations Plan <input type="checkbox"/> Policies and Procedures Development Tip Sheet <input type="checkbox"/> Policy Development Template and Samples <input type="checkbox"/> DIY Audit Project Plan <input type="checkbox"/> Volunteer Program Assessment Audit Checklist



Phase THREE: GROW ENGAGEMENT (Volunteer Recruitment)

Modern Recruitment Strategies to Attract a Diverse Fanbase of Supporters

In this phase, you are setting goals for the number and kinds of volunteers you hope to engage and putting in place an outreach and marketing system that can help you get there. You will specify the ideal volunteers you hope to mobilize and will develop a strategy to build a fanbase using online and on-land tactics to reach volunteers where they are at and inspire them to take action.

	Capabilities	Milestones	Action Items
Level 1: Early Stage	Ready to build out foundational elements of strategy; able to ask others for focused ideas & input	<ul style="list-style-type: none"> • You have assessed your existing recruitment activities. • You know the key characteristics of the kinds of volunteers you are looking for. • You've developed clear descriptions and objectives for each potential volunteer role. • You've developed key elements of your volunteer recruitment strategy. 	<input type="checkbox"/> Volunteer Recruitment Strategy Self-Assessment <input type="checkbox"/> Volunteer Personas Worksheet <input type="checkbox"/> Volunteer Job Design Worksheet <input type="checkbox"/> Recruitment Campaign Template
Level 2: Adapting	Able to reflect upon & adapt strategies for greater results; able to share progress with others	<ul style="list-style-type: none"> • You engage in various messaging platforms to attract volunteers to your organization. • You feature and share compelling success stories to make emotional connections with potential supporters. • Your agency's website features an easy to find, volunteer friendly recruitment webpage. • You have a fully integrated onboarding, orientation, and training system that prepares volunteers for their roles. 	<input type="checkbox"/> Messaging Platform Template <input type="checkbox"/> Communications Platform Template <input type="checkbox"/> Volunteer Recruitment Copywriting Workbook <input type="checkbox"/> Storytelling Workbook <input type="checkbox"/> Integrated Onboarding Planning Worksheet
Level 3: Mature	Clear which management interventions are most likely to bring about which strategic results; able to teach others best practices	<ul style="list-style-type: none"> • Your organization has invested in marketing tools that can help volunteer services drive digital marketing activities. • Your website has been optimized for volunteer traffic. • You regularly collect and use volunteer testimonials for volunteer services marketing materials. • You utilize a variety of methods (online, in-person, self-guided, on the job, etc.) to train and prepare volunteers for service. 	<input type="checkbox"/> Volunteer Conversion Worksheet <input type="checkbox"/> Landing Page Checklist <input type="checkbox"/> Tip Sheet for Better Volunteer Testimonials <input type="checkbox"/> Online Volunteer Recruitment Campaign Workbook



Phase FOUR: SUSTAIN INVOLVEMENT (Volunteer Retention)

Improving the Volunteer Experience & Retaining High-Impact Volunteer Talent

In this phase, you are taking purposeful steps to retain volunteer talent and amplify the impact of their work. This phase includes volunteer supervision and recognition activities, but it also includes your strategy for encouraging deeper commitment. Understanding volunteer perceptions is key to pinpointing motivations, so you are also gathering survey data and making decisions based on actionable volunteer feedback.

	Capabilities	Milestones	Action Items
Level 1: Early Stage	Ready to build out foundational elements of strategy; able to ask others for focused ideas & input	<ul style="list-style-type: none"> • You have clarified which commitments you expect volunteers to meet, and which that you will make, for mutual benefit. • You have identified volunteer motivations, needs, barriers, and where gaps exist in the volunteer's onboarding process. • You have a plan to appreciate volunteers at all levels of the organization and its in active use. 	<input type="checkbox"/> Volunteer Agreement Template <input type="checkbox"/> Volunteer Onboarding Journey Map Template <input type="checkbox"/> Volunteer Motivations & Expectations Worksheet
Level 2: Adapting	Able to reflect upon & adapt strategies for greater results; able to share progress with others	<ul style="list-style-type: none"> • You employ online and offline strategies to orient volunteers to your agency and prepare them for success in their roles. • You regularly collect robust feedback from volunteers to make program improvements. • You develop and deploy multi-channel content to deepen levels of volunteer engagement and commitment. 	<input type="checkbox"/> Blended Learning Design Workbook <input type="checkbox"/> Volunteer Survey Project Scope Worksheet <input type="checkbox"/> Volunteer Management Communications Worksheet
Level 3: Mature	Clear which management interventions are most likely to bring about which strategic results; able to teach others best practices	<ul style="list-style-type: none"> • You have a purposeful plan to induct volunteers into the organizational culture and gather feedback early on. • You have a multi-level plan in place to recognize and retain high-impact volunteer talent that includes online engagement. • There is a clear progression of steps volunteers can take toward leadership roles. • Employees, beyond volunteer services, have dedicated roles to play in supporting an exceptional volunteer experience. • Employees are trained on their responsibilities related to volunteers and these tasks are included in their job descriptions. 	<input type="checkbox"/> Integrated Onboarding Planning Worksheet <input type="checkbox"/> Volunteer Retention Action Plan Template <input type="checkbox"/> Annual Volunteer Recognition Plan Budget Worksheet <input type="checkbox"/> Volunteer Leadership Development Pipeline Worksheet <input type="checkbox"/> Chart of Accountabilities Spreadsheet



Phase FIVE: SCALE LEADERSHIP (Ownership & Accountability)

Purposeful Development & Support for Greater Ownership & Accountability

In this phase, you are taking steps to delegate and distribute responsibility throughout your team. As volunteer engagement grows at your agency, it will be impossible to keep tabs on everything. That's where a trained and highly-effective team of volunteer leaders can help. You will also look both inside and outside your organization and develop mutually-beneficial partnerships that can help you meet your goals.

	Capabilities	Milestones	Action Items
Level 1: Early Stage	Ready to build out foundational elements of strategy; able to ask others for focused ideas & input	<ul style="list-style-type: none"> You have connected your personal values the specific actions you take as a formal and informal leader. Volunteers are encouraged to build their skills, autonomy and impact through leadership roles at all levels of the agency. Volunteer advisory and project teams are active across your agency and each team has a clear scope of work and structure that supports autonomy and accountability. 	<input type="checkbox"/> Personal Values Clarification Worksheet <input type="checkbox"/> Volunteer Leadership Development Plan Worksheet <input type="checkbox"/> Team Road Map Template <input type="checkbox"/> Team Charter Template
Level 2: Adapting	Able to reflect upon & adapt strategies for greater results; able to share progress with others	<ul style="list-style-type: none"> You have a proactive plan in place for managing agency transformation and reducing resistance to change on the part of both volunteers and co-workers. You have a clear process for effective project management. There are clear expectations, standards, and a regular review process for departments that accept volunteer placements Employees and agency leadership are updated regularly on the progress and impact of volunteer activity and initiatives. 	<input type="checkbox"/> Change Management Communications Planning Workbook <input type="checkbox"/> Project Planning Template <input type="checkbox"/> Volunteer Placement Agreement <input type="checkbox"/> Volunteer Strategy Briefing Slide Template
Level 3: Mature	Clear which management interventions are most likely to bring about which strategic results; able to teach others best practices	<ul style="list-style-type: none"> You have a clear awareness and understanding of your own of your barriers to effective leadership and how to remedy them. You have an approach for finding, negotiating, and enlisting the support of stakeholders to meet ongoing agency needs. Advanced leadership and supervisory skills training are offered to employees and volunteer leaders so they can effectively supervise and engage volunteers. You personally advocate for volunteer services, develop volunteers as advocates, and promote volunteer leadership at every level of your organization. 	<input type="checkbox"/> Leadership Identity Self Reflection Worksheet <input type="checkbox"/> Partnership Development Strategy Workbook <input type="checkbox"/> Partnership Agreement Template <input type="checkbox"/> Training Agenda for Orienting New Staff <input type="checkbox"/> Messaging to Upper Management Roadmap



Notes