

# Volunteer Engagement Strategic Planning Checklist

A volunteer engagement strategic plan clarifies how volunteers contribute to mission success and what investments (staff time, systems, budget, space, technology) are required to support that contribution. Done well, it positions volunteer engagement as a crucial, organization-wide capacity-building strategy—not a program that is simply “nice-to have”.

Use this checklist to guide organization-wide planning that aligns volunteer engagement with mission, priorities, and operational realities.

## Organization-Wide Planning Checklist

### 1

#### Make the Case for Planning

Before planning can begin, leadership and key stakeholders must understand why this work matters and what problem the plan will solve.

- Assess current volunteer engagement practices  
 Use a structured assessment (e.g., VQ Volunteer Strategies assessment), another diagnostic tool, or a facilitated SWOT analysis with staff and volunteers to identify strengths, gaps, risks, and opportunities.
- Conduct an organizational needs assessment  
 Identify where volunteers could be engaged to fill gaps across programs, departments, or operations.
- Gather external evidence and examples  
 Compile brief case studies or examples showing how other organizations have leveraged volunteer engagement plans to improve impact, efficiency, or sustainability.
- Communicate findings and secure approval  
 Synthesize findings into a concise summary for leadership that clearly outlines the rationale, anticipated benefits, and requested commitment to move forward.

## 2

### Engage Others in the Work

A volunteer engagement strategic plan succeeds only when it reflects shared ownership across the organization.

- Form a cross-divisional planning task force  
Include representatives from multiple departments or divisions, with leadership approval for time commitment, and involve at least two volunteer leaders to ensure the volunteer perspective is embedded.
- Share assessment findings and expectations  
Provide task force members with assessment results, background materials, and a clear planning timeline so participants arrive informed and aligned.

## 3

### Develop the Strategic Plan

Dedicated, structured planning time allows the group to move beyond tactics to shared priorities and direction.

- Design and host a planning retreat or work sessions  
Plan a full-day retreat or a series of half-day sessions focused on vision, priorities, and alignment.
- Engage a skilled facilitator  
Use a neutral facilitator to guide discussion, manage group dynamics, and keep the focus on strategy rather than operational detail.
- Develop a shared vision for volunteer engagement success  
Facilitate the creation of a clear, compelling vision that is both aspirational (stretching the organization toward its potential) and inspirational (energizing staff and volunteers to engage in the work). This shared vision provides direction, serves as a decision-making compass, and anchors goals and priorities throughout the plan.
- Define priorities, goals, and objectives  
Identify high-level volunteer engagement priorities, then translate them into clear, actionable goals and objectives that advance the shared vision.
- Seek leadership review and approval  
Share the draft plan with organizational leadership to confirm alignment with mission, strategy, and resource realities.

# 4

## Implement and Integrate the Plan

Implementation is most effective when volunteer engagement is embedded into existing systems—not treated as a standalone initiative.

- Communicate goals and expectations organization-wide  
Share the approved plan through staff meetings, department meetings, internal communications, and leadership updates.
- Establish a tracking and accountability system  
Align volunteer engagement metrics and milestones with existing organizational planning, reporting, or dashboard systems.
- Integrate actions into departmental plans and budgets  
Work with department leaders to incorporate relevant objectives, activities, and resource needs into their operational plans.
- Monitor, report, and celebrate progress  
Track implementation through quarterly and annual reporting, highlighting progress, lessons learned, and volunteer impact.

A strategic volunteer engagement plan is not a one-time document—it is a living framework that guides investment, decision-making, and partnership between staff and volunteers in service of mission impact.