

## [COMPANY] Volunteer Event Planning Checklist

Planning a volunteer activity? Great! A successful employee volunteer event requires careful planning and coordination. This document contains information to help you through the entire process—from picking the activity—to following up after it is over. Here, you will find planning strategies, ideas for activities, and a recommended timeline for holding your volunteer event. By reading over this at the start of your planning and referencing it throughout the process, we hope that you or any employee at your company will have all the information needed to plan a successful and fun volunteer activity.

### Planning Tips and Guidelines

1. Determine if your volunteer activity will fall into one of the suggested themes or focus areas. It is also good if this is aligned with an organization that you consider a nonprofit partner, have previously volunteered with, or has been a grant recipient. Consider if you want your activity to be in-house, off-site, or a blend to encourage all staff to be able to participate. Examples and ideas:
  - a. Spring: Environmental or Health and Wellness
    - i. Park cleanup
    - ii. Heart Walk
  - b. Summer: Education and Service
    - i. Back-to-school activity like a backpack drive
    - ii. Military troop drive
  - c. Fall: Basic Needs and Disaster Preparation
    - i. Canned food or coat drive
    - ii. 'Ready-when-the-time-comes' Training with the American Red Cross
  - d. Winter: Families and Youth
    - i. Holiday 'Adopt-a-family'
    - ii. Blood drive
2. Decide the scope of the volunteer opportunity for your timeframe
  - a. Seek manager approval and, if possible, a project champion from the executive staff
3. Identify the perfect nonprofit for partnering
  - a. Identify nonprofits that your organization already has an existing and/or ongoing relationship with. Or, determine if you want to explore a new relationship with a potential nonprofit through this initial volunteer event. Ask if these nonprofit partners achieve the goals of your activity? Is there a nonprofit with whom you have a personal relationship?
  - b. Work with the selected nonprofit to scope and develop a project that works within the allotted budget, is logistically good, and would be appealing or educational to targeted staff.
  - c. If applicable, inform the nonprofit that this is an employee-led initiative and not an indicator of potential funding from your organization.
  - d. Best practice: Include budget for a monetary donation to the hosting nonprofit.
4. Pull together your in-house planning team and contact the nonprofit to plan your event
  - a. Confirm date/location/time
  - b. Number and type of volunteers needed (Hands-on? Skilled?)
  - c. Age requirements?
  - d. Disability access?
  - e. Appropriate attire (Closed-toe shoes? Company
- b. Determine why you are volunteering (team building, employee rewards and recognition, leadership & development, alignment of business priorities to philanthropic goals?)
- c. Determine employee preference for on-site or off-site volunteering and length of time (Full day? Half day?). In general, on-site volunteering has a higher rate of participation, however, off-site volunteering allows employees to get away from the office and interact directly with the nonprofit. Off-site volunteerism is also ideal for teambuilding.
- d. Determine budget and if you're going to seek in-kind donations like food or water.

- t-shirt? Weather concerns?)
- f. Specific work to be completed with project description
- g. Teaming/educational opportunities and activities?
- h. Safety and first-aid plan and supplies
- i. Being “green” while volunteering
- j. Food and water
- k. Solidify budget
- l. Social media, photos, video reporters
- m. Plan to capture impact or outcome metrics.  
(Examples include: # of volunteers, # of volunteer hours, types of volunteer skills used, clients served, resources diverted from trash, etc.)
- n. Contact information and any needed release forms

#### 5. Discuss a back-up plan

- a. Weather problems or other unforeseen events
- b. Too many/too few volunteers

### Timeline

#### One Month+ in Advance

- Inform employee volunteer council and/or community engagement personnel
- Secure management champion and support
- Secure budget and any in-kind donations
- Email event information, nonprofit description, and volunteer invite or posting to all appropriate staff
- Post event flyer around campus/office
- Two Weeks+ in Advance
- Re-send your email invite or volunteer posting if needed
- Re-connect with the nonprofit
- Determine t-shirt needs
- Finalize event pre logistics
- Three days+ in Advance
- Re-connect with your nonprofit and finalize all last minute details
- Check and re-check your “to-do” list
- Email all volunteers with volunteer assignments, directions, and instructions (What to wear/what to bring)
- Secure required supplies (Water, sign-in sheets, release forms, etc.)
- Distribute company or volunteer t-shirts as needed

- Plan to bring your camera/video to record the volunteering

#### Day of/During the Event

- Have nonprofit welcome volunteers and explain the mission of the organization and how volunteering projects help achieve their goals
- Have volunteers sign-in and collect needed release forms
- Take photos and videos in action and use social media
- Capture impact and outcome metrics
- Thank your volunteers and the nonprofit as they leave
- Cleanup, donate any extra materials and be as environmentally friendly as possible
- Have fun!

#### One-two days after the Event

- Send a thank you message to the nonprofit and share any photos or testimonials with them
- Send a thank you to all your volunteers and their managers
- Ask volunteers to share their favorite moments and pictures
- In the week following the Event
- Send a story recap to the marketing team, with photos and captions included.
- Forward any thank you messages from the nonprofit to the employee volunteer council, community engagement personnel, and senior leadership.
- Report your results and outcomes (How many people were impacted, etc.?)
- If your company has a Volunteer Rewards and Recognition program, nominate any outstanding volunteers for their efforts.