

ORGANIZING FOR ENGAGEMENT

✓ CHECKLIST ✓

Are you trying to up the effectiveness and impact of your engagement and volunteer initiatives? Do you want to implement a program that will engage people in meaningfully contributing to positive change?

Here's a handy checklist to review how ready your volunteer and engagement programs are for successful:

Step 1: Have a clear Theory of Change

- We have a defined Theory of Change that clearly describes how our activities contribute to specific outcomes.
- All of our staff and key volunteers could complete a similar “If we do X activity then Y outcome would result” sentence.
- Our Theory of Change connects how and why engagement activities are important to achieving environmental outcomes.

Step 2: Know your people

- We have defined who our priority people (aka audiences) are for each of our engagement initiatives.
- This people identification goes beyond “general” public as an audience.
- We have developed people profiles for each of our priority audiences. This means spending time thinking about: why our people may and may not care about our outcomes; what values link our people to our outcomes; and where we will best find our people.

Step 3: Use stories to drive engagement

- We have integrated story-based communications:
 - On our website;
 - In our e-communications;
 - In our funding reports and proposals;
 - In our annual reports.
- We have defined a clear pitch that all staff and key volunteers use (and personalize) when talking about the organization and/or specific campaigns/programs.

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- ❑ A storytelling arc is used effectively in campaign/organizational communications: ie. “Challenge→ Choice→ Outcome→ Ask.”

Plan for successful engagement

- ❑ We have an engagement pyramid for each of our engagement initiatives.
- ❑ We have combined these pyramids to provide us with an organizational overview of engagement.
- ❑ Our engagement pyramids include volunteer engagement in addition to donor engagement.
- ❑ Our engagement pyramids inform communication touch points and asks. (ie. They inform both manual and automated communication).
- ❑ As an organization, we take seriously the role of volunteers in our programs and build opportunities to incent and encourage leadership development.
- ❑ Our volunteers are integrated into teams that have specific, time-bound, projects with clear outcomes.

Evaluate, learn and adapt!

- ❑ We have an integrated contacts management system (CMS) that:
 - ❑ Consolidates all of our supporters into one central database;
 - ❑ Informs us of the success of communications and engagement touch points; and
 - ❑ All staff and key volunteers have access to and contribute regularly to contact/data collection.
- ❑ We have embraced data collection, establish engagement baselines, set engagement goals and measure engagement success on a regular and sustained basis.
- ❑ We can see, at any given point of time, where our supporters are situated within our engagement pyramid(s).
- ❑ We adapt our engagement activities regularly based on how successful activities they are at contributing to our environmental outcomes.

***Remember, even when we have most of these items checked, we still have work to do. In fact, often that’s when the real work begins! Doing each of these things is a first step, doing them well takes time, and refinement!**

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