



# Individual Volunteer Plan (IVP)

The Individual Volunteer Plan is a tool, adapted from the concept of Individualized Education Plans (IEPs), and is designed to customize a volunteer engagement career to meet both the volunteer's aspirations and the organization's needs. The benefit of using an IVP is that the process of completing the tool strategically and intentionally develops potential staff members, board members, and volunteer leaders from your community of volunteers—people who will take your organization into your preferred future.

Definitions for each section are listed on page 3.

**Volunteer:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Support Liaison (Supervisor):** \_\_\_\_\_

## Current Competencies

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

## Goals and Benchmarks

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

**Additional Needs**

- 1. \_\_\_\_\_
- 2. \_\_\_\_\_
- 3. \_\_\_\_\_
- 4. \_\_\_\_\_
- 5. \_\_\_\_\_

**Signatures**

Volunteer: \_\_\_\_\_

Supporter (Supervisor): \_\_\_\_\_

Executive Director: \_\_\_\_\_

Board Chair: \_\_\_\_\_

**Updates**

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Date for Next Progress Review:** \_\_\_\_\_

## **Current Competencies**

Baseline assessment of the volunteer's current knowledge, abilities, functioning, and accomplishments across core competencies that you or your organization has identified.

## **Goals and Benchmarks**

Once you are clear on the volunteer's current level of performance, you can – together – choose skills, competencies, and experiences on which to focus. For each focus area, set a goal and some benchmarks along the way so that you can both assess progress toward each goal.

## **Additional Needs**

This is the place to add services or equipment the volunteer will need to successfully reach the goals you have chosen. These services could include specific items such as special software, assistive devices, special accommodations, and general requests such as transportation and training.

## **Signatures**

While many volunteer position agreements have a place where volunteers sign to indicate that they will abide by organizational regulations and that they understand their commitments, signatures are rarely used, or even considered, strategically. An example of using signatures beyond risk management is using them to denote the importance of the position. A volunteer receives a very clear message when the IVP requires a signature from, for example, an Executive Director or Board President.

## **Updates**

We strongly recommend scheduling times when you, the volunteer, and other involved staff and volunteers convene to review progress and revise the plan as needed. However, when and how often you do this may vary, especially if you are looking at some episodic or project-based assignments, some long-term positions, or both. Find the junctures that make sense for the position and your organizational culture. For example, choose the anniversary of the person's service or date of a significant project completion. Also, observe the volunteer or speak to colleagues working with her or him to assess the need for a check-in. Strategic opportunities may also present optimal times for an update – and not just during official strategic planning. Perhaps your organization receives a sizable new gift that takes you in a new direction. Which of your top performers might be ready to step up and champion that new direction?