Tool

The engagement pathway tool

Many small not-for-profits find recruitment harder than it needs to be. By the time a board seat opens up or a volunteer leaves, there is rarely anyone obvious to step in. This tool helps your organisation move from reactive recruitment to a steady, intentional approach by treating recruitment as the visible end of a longer relationship. Work through it on your own, with a colleague, or as a board agenda item. Set aside 45 to 60 minutes. There are no right answers, just clearer ones.

Organisation	
Completed by	
Date	
Discussed with	

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Part 1: Map your people

You cannot grow what you cannot see. Most small not-for-profits underestimate their own community. Before you plan anything, get a rough picture of who is already in your orbit and where they sit on the pathway. Working from memory is fine. Names, role types, or groups all work. Do not aim for a complete list, aim for a representative one.

Stage	Names or groups who sit here	Roughly how many?
1. Aware		
2. Interested		
3. Involved		
4. Invested		
5. Leading		

After mapping, take a moment to notice what surprised you. Were any stages emptier than expected? Fuller? Did you find people you had forgotten about?

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Part 2: Find your bottleneck

Every pathway has a pinch point: the gap where people stop progressing. Fixing one bottleneck is almost always more useful than improving everything at once. For each transition, name what you think is getting in the way. Then commit to one small action you could realistically take in the next month.

The gap	Why do you think it is there?	One small thing to try
Aware to Interested		
Interested to Involved		
Involved to Invested		
Invested to Leading		

Which gap will you focus on first? Note the one transition above that, if improved, would make the biggest difference to your organisation in the next 6 to 12 months.

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Part 3: Audit your current practice

Engagement habits beat engagement events. Small, consistent practices build a community over time. For each habit below, tick where you sit honestly: Not yet, Sometimes, or Consistently.

Habit	Not yet	Sometimes	Consistently
We can describe what we do in one clear sentence.			
We send a warm welcome to new subscribers, donors or supporters.			
We stay in regular, useful contact, not just when we want something.			
We thank people personally for specific contributions.			
We ask supporters and volunteers their opinion on real decisions.			
We offer small stretch opportunities before formal roles.			
We have honest conversations about workload with the people who give us a lot.			
We talk about board succession well before vacancies appear.			
We do proper inductions, even brief ones.			
We help people leave well, with thanks and a clear ending.			

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Pick two habits to strengthen. Not your weakest two, your most strategic two: the ones that would shift your bottleneck.

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Part 4: Make it someone's job

The pathway does not need a dedicated role, but it does need a named person who notices. In small not-for-profits, work without an owner tends to become work that does not happen.

Who will hold this work? This could be a board member with a people lens, a coordinator giving 30 minutes a fortnight, or shared between a small group.

How will they report back? How often will this person update the board or team on engagement progress? What does progress look like?

Where could AI tools help, and what guardrails will you set? Examples: drafting welcome emails, summarising volunteer feedback, plain language summaries of board papers. Guardrails: do not put identifiable personal data into public AI tools, always have a human review communications.

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Part 5: Your three actions

Frameworks change nothing on their own. Commit to three actions, no more, that you will take in the next 90 days. Three is enough to make a difference and few enough to actually do.

Action	Who	By when

When will you revisit this worksheet? Diary the date now. Three months is a good rhythm.
