

6 Essential Steps for Volunteer Intake/Onboarding

STEP	TASKS & THINGS TO CONSIDER	WHY IS THIS IMPORTANT
1. GET CONTACT INFO & BASIC VOLUNTEER INTEREST	<ul style="list-style-type: none"> Right away, ensure you get the following! <ul style="list-style-type: none"> Full Name, Phone AND Email Interests specific to volunteering; Special skills they might contribute General availability 	<ul style="list-style-type: none"> No contact info, no volunteer! Getting interests, etc. allows you to prioritize which volunteer opps to develop & bring forward <i>you're your limited time strategically</i>)
2. THANK THEM WITHIN 48 HRS FOR THEIR INTEREST	<ul style="list-style-type: none"> By phone or email - even if saw them in person or online application form sent auto thank you Have several interested volunteers? Divide up b/w several people in your org so it gets done! <ul style="list-style-type: none"> Promise to follow up with them regarding specific opps by X date (<i>should be within 2 weeks to reduce loss of interest</i>) 	<ul style="list-style-type: none"> Shows their time and contributions are valued Positive 1st impression of org & ↑engagement Giving follow-up deadline helps keep you accountable in fleshing out Step 3 (if not done)
3. DETERMINE AREAS OF NEED & POSSIBLE ROLES	<ul style="list-style-type: none"> Consider what activities need to be done to run your org. and further your mission Can you group related tasks into roles? Flesh out possible roles, using following questions: <ul style="list-style-type: none"> What would you call position and what project / committee would it serve? What key responsibilities & tasks would you want to assign to the role? How would responsibilities / tasks contribute to larger organizational plan or mission? What benefits would a person gain from being in this role? What skills & attributes are required? To whom would the volunteer report? What training can be given and by whom? What sort of time commitment is required? (Period of time, hours/days per month) 	<ul style="list-style-type: none"> Gives you feeling of control over volunteer recruitment & mng't process – proactive vs.reactive Allows you to see your activities from new perspective, ie. how some activities might be “packaged up” and handed off Knowing why activities may be meaningful helps you sell benefits up front (↑engagement) Gives you time to prepare for supports necessary Helps you better match the volunteer to the right role and ensure a good ‘fit’ for your organization
4. FOLLOW UP WITH POTENTIAL VOLUNTEER WITH DETAILS	<ul style="list-style-type: none"> Have someone from your organization meet with them to share: <ul style="list-style-type: none"> More about your organization The opps available that might fit interest (you could bring role descriptions with you) How these opportunities might fit with their availability 	<ul style="list-style-type: none"> Ensures they're crystal clear on what your org. does because they will talk about you lots with others! Discussing opps in person lets you assess if a good fit, reliable, intelligent, etc. Helps you tailor positions to their availability & skills
5. PUT VOLUNTEER SUPPORT PROCESS IN PLACE	<ul style="list-style-type: none"> Decide: <ul style="list-style-type: none"> What is next step with volunteer (eg. is there event committee meeting to attend) When will you talk / check in next? What will the next step after that be? How might you keep this person engaged? Communicate process with anyone from org. who will come in contact with this volunteer 	<ul style="list-style-type: none"> This meeting is their orientation to your org: Important that they are crystal clear on what your organization does because they will be talking about you lots with others! Ensures others in your org. are prepared / consistent in supporting volunteer
6. THANK THEM	<ul style="list-style-type: none"> Decide what you will do to show your thanks for their contributions Schedule meeting on end date to thank, share how contributions had impact overall 	<ul style="list-style-type: none"> Can use reminders for check ins, thank you notes, etc. ie be proactive in keeping volunteer engaged

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A PERSON SHOWS INTEREST IN VOLUNTEERING....WHAT SHOULD YOU DO NEXT SO YOU DON'T LOSE THEM?

