



Questions to ask yourself:

Assessing your processes for bringing in new volunteers (screening and onboarding)

Do your processes demonstrate these qualities?

1. **Continually improving** — When was the last time you tweaked your processes? What's working and what's not working?
2. **Transparent** — Have you clearly laid out what the steps will be, so they know what to expect? Can the volunteer easily see/understand their next step?
3. **Quick** — Where can you decrease the amount of steps/clicks/effort/waiting time?
4. **Flexible** — Whenever possible, can you give options for how to accomplish each step? Can you decrease the rigidity and create different pathways for different scenarios -- i.e. lower levels of screening for some roles? A quicker process for someone who has volunteered with you before?
5. **Justified** — Make sure *you* understand the necessity of each of the steps and communicate the "why" to prospective volunteers.
6. **Relational** — Consider the formality of your process and your language. Can you make it more about getting to know the prospective volunteer and ensuring the role is a good fit for them?
7. **Motivational** — What's the carrot that will keep them moving toward the goal? Can you gamify the process?
8. **Tracked** — What percent of your volunteer inquiries make it through the process and end up volunteering with you?



How do people express their interest and set the screening/onboarding process in motion?

9. Do you have a website with information about your volunteer opportunities?
 - a. If yes, how many clicks does it take for prospective volunteers to find information on volunteer opportunities on your website?
 - b. How much info is available online about your volunteer roles? Consider that most people want to know what they're getting into before they take the next step. For example, do prospective volunteers have access to the position descriptions? Expected time commitment? Steps of the screening process?
10. When they find info about volunteer opportunities, can they clearly see what their first step is? Or is there a clear call to action?
11. What is your call to action?
 - a. Schedule yourself immediately for a low-risk opportunity?
 - b. Show interest in volunteering?
 - c. Kick off the screening process?
12. After they take the first step, how long do they generally wait to learn what comes next?

Regarding your screening processes...

13. How transparent are your requirements and qualifications, so that volunteers may potentially screen themselves out and save everybody time? I.e., experience required, physical expectations
14. Do all of your volunteer opportunities require the same level of screening?
 - a. Which of your opportunities require a background check and which don't? And why?
 - b. Consider low-risk opportunities for prospective volunteers to dip their toes.



15. How mutual is the screening process?
 - a. How much of your process focuses on the volunteer learning about your mission and opportunities, so they can choose the right volunteer role for them?
16. How intimidating are the steps? Consider your language:
 - a. "formal Interview" v. "chat to get to know you," "Application" v. "Interest form"
17. How time-consuming are the steps?
 - a. I.e., how many questions in your application?
18. What options do volunteers have, regarding how they complete the steps?

Once they are accepted as volunteers...onboarding!

19. Do you have an onboarding process? How many steps?
20. What are the main goals of your volunteer onboarding process? Does it achieve them?
21. What kinds of orientation and training does the volunteer receive?
22. How similar or different are the volunteer onboarding and employee onboarding at your org? Is there anything from employee onboarding that would be helpful to carry over?



23. Does the volunteer have any choices about how they complete their onboarding? I.e., choose between a video training at night or in-person training during the day
24. Who keeps track of the volunteer's onboarding steps?

Places to start:

- Identify: Where do you seem to lose people?
 - Is there a pattern regarding the step that trips people up -- where prospective volunteers seem to get confused or ghost you?
- Consider the order of your steps — are you asking potential volunteers to do the hardest step first?
- Ask your current volunteers about their experience screening and onboarding with you.
- Ask your current volunteers how you can improve your screening/onboarding.
- Have a person you trust go through the process to help you understand the volunteer perspective.
- Reach out to volunteers who did not complete the process — no judgment! “We’re just curious about how we can improve.” Consider an anonymous survey to gather this data.
- What percent of your volunteer inquiries make it through the process and end up volunteering with you?
- If you choose one goal for improvement, how will you track your progress?
 - What we measure matters!