Creating Connection Series:
Invitations & On-boarding Worksheet

Please complete before attending or watching the Orientation & Team Building Workshop.

What does your current invitation process entail? Are volunteers invited to join, or is the assumption that anyone expressing interest can volunteer? Is the current process working? Are they challenges, or places where volunteers drop off?
This process can, and should be, dependent on the role. You are welcome to select one role, or use this worksheet to evaluate your general invitation and on-boarding process. If you don't have a formal/defined invitation process what might work best for your organization? Consider information sessions, conversations/interviews, screening activities, and compulsory training prior to start.

If you've identified challenges or barriers for volunteers completing the steps before an invitation is made, what might you implement to mitigate those challenges/barriers?
Think about potentially streamlining this process – removing initial steps like a general application, personalizing information sessions by having individual phone calls rather than waiting for a group information session (often called an Orientation, but we'll discuss orientation to the role/organization next time.), or offering a probationary role while waiting for background checks to be completed.

Do you have a process or system for saying no to prospective volunteers? Is this something you feel comfortable doing? Does your organization feel comfortable doing this? Are you allowed to say no to a volunteer that isn't a good fit for a role or your organization? If no – why do you think that is? And is that a policy that should be reviewed? And, are prospective volunteers allowed to say no to you? Or is the assumption that they'll volunteer, so they feel compelled to move forward in the process and often "ghost" the organization later?
Personally I believe that finding the right volunteer for the right role is the cornerstone of a successful volunteer engagement strategy, and part of our jobs as leaders of volunteers is to say no and allow prospective volunteers to say no. But saying no can be hard (or even forbidden by our organizations.) No one likes saying no, but if you are uncomfortable doing this what would you need to do or learn to be better at this responsibility? And if your organization doesn't support this type of policy would it make your job easier if it did?
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Think about your organization's on-boarding practices for new volunteers. How are volunteers welcomed into your organization? Who greets them and introduces them to your organization's culture? Is that person you? A senior/experienced volunteer? Is that process formalized and standardized? Is it left to that person to determine what's important? Is your current process working?

That first introduction can make a big difference – does the volunteer feel welcomed and important? Do they feel like they're taking this person away from their "real work"? Has this person been given training and support on how to welcome or mentor new volunteers? What could you do to help a new volunteer feel more integrated into your organization and more comfortable?

If volunteers drop out during or after the on-boarding process it can create a sentiment that "volunteers are more work than they're worth" with staff (paid and volunteer) introducing volunteers to the work (including orientation and training activities) and then having that volunteer not continue. If this is happening in your organization what might you do to minimize the number of volunteers that drop out after learning more about the organization, role, or work?

If you attended the Recruitment Workshop Series think about the Persona for this role(s). Are you recruiting the right person? (if you haven't explored Personas you may want to consider watching the Recruitment Workshop Series.) Is there something you could share during the Invitation process that might help volunteers determine that this role/work is not right for them before the on-boarding process?

What is one thing you could add or change to your on-boarding process to help volunteers feel more connected to your organization and mission? What is one thing you could add or change to help make the on-boarding process more efficient and effective for staff conducting the on-boarding activities?

If you don't have a formal and defined on-boarding process yet, consider who in your organization might be a good person to help identify and build this process. Seasoned or senior volunteers, staff leading or supervising volunteers, or staff on-boarding new hires might be helpful in designing this process.