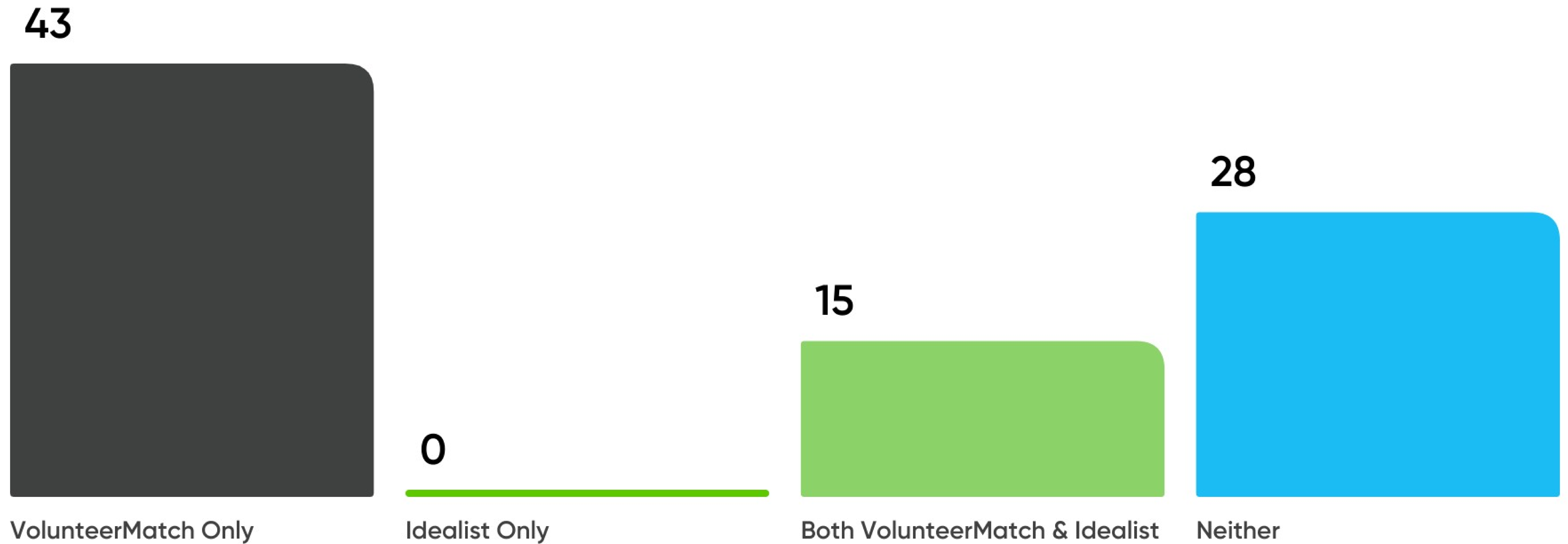




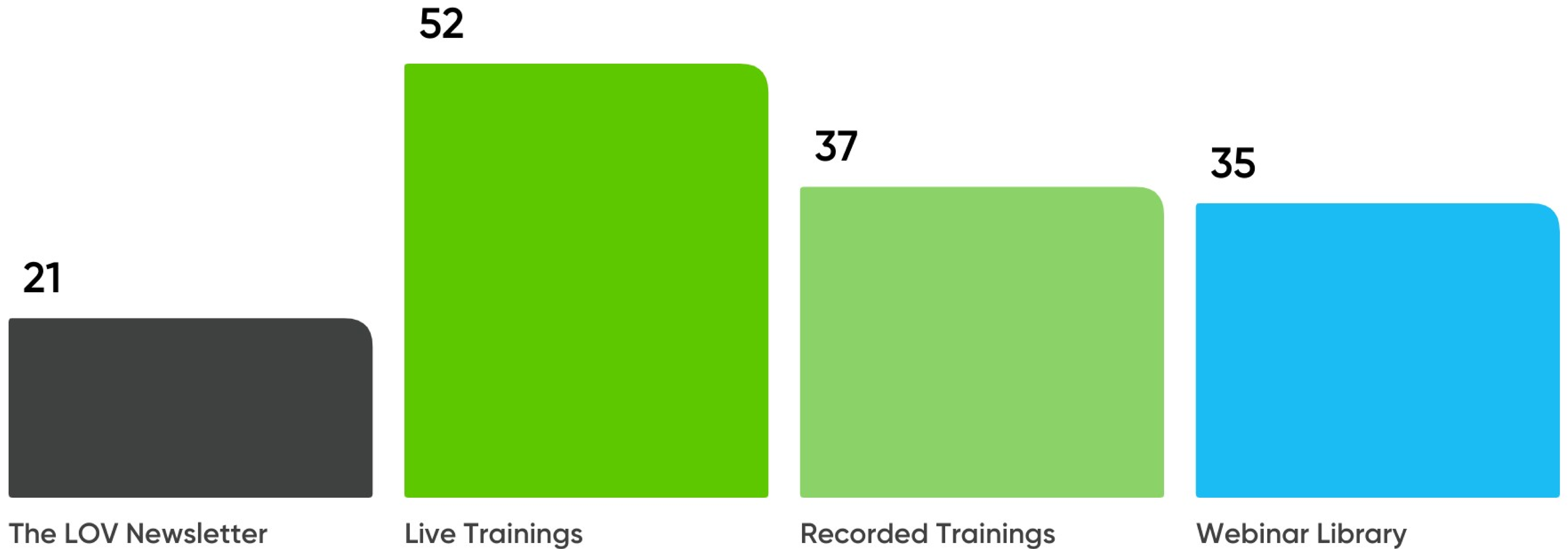
Creating Connections Workshop Series: Invitations & On-Boarding



Are you currently using:



Which of these VolunteerMatch Learning Center do you find valuable



Welcome!

This series is designed to walk you through the most important components for creating connections with new and ongoing volunteers.

- All resources and recordings will be shared
- You'll get out what you put in – consider planning an hour of focus time between workshops
- I can't do it for you, but I'm here to help

Creating Connections Workshops

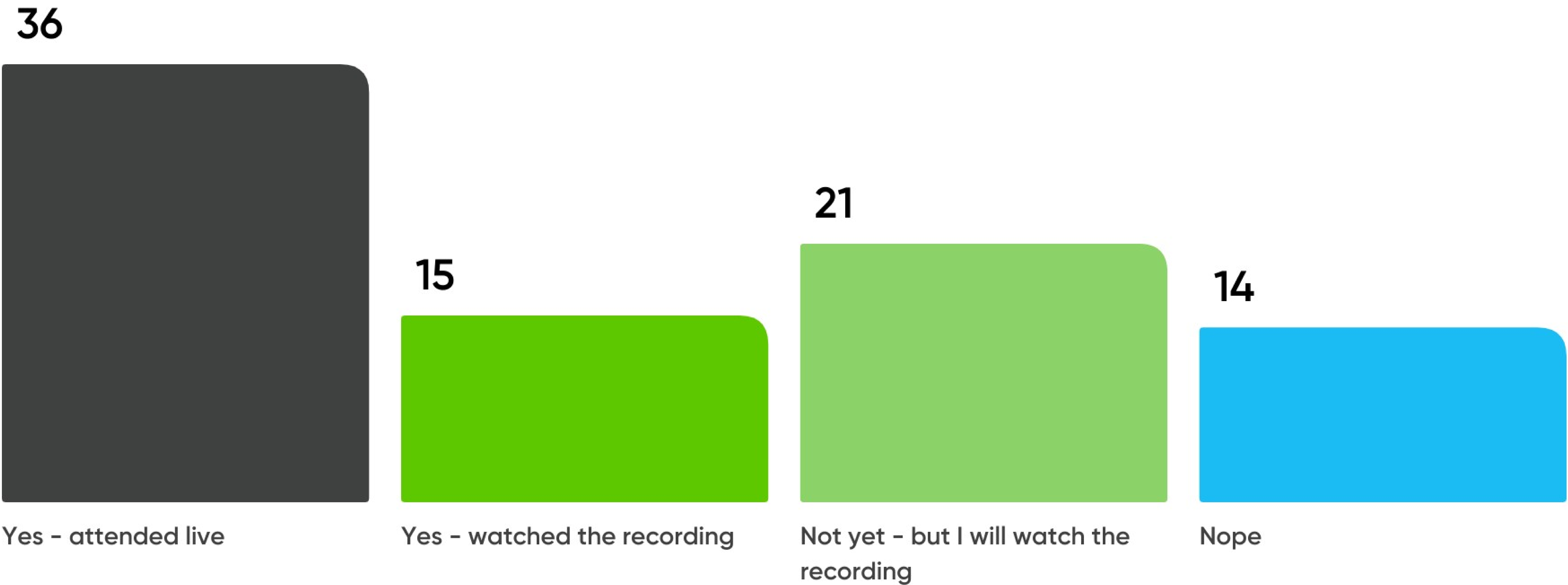
Previous Sessions:

- Kick Off

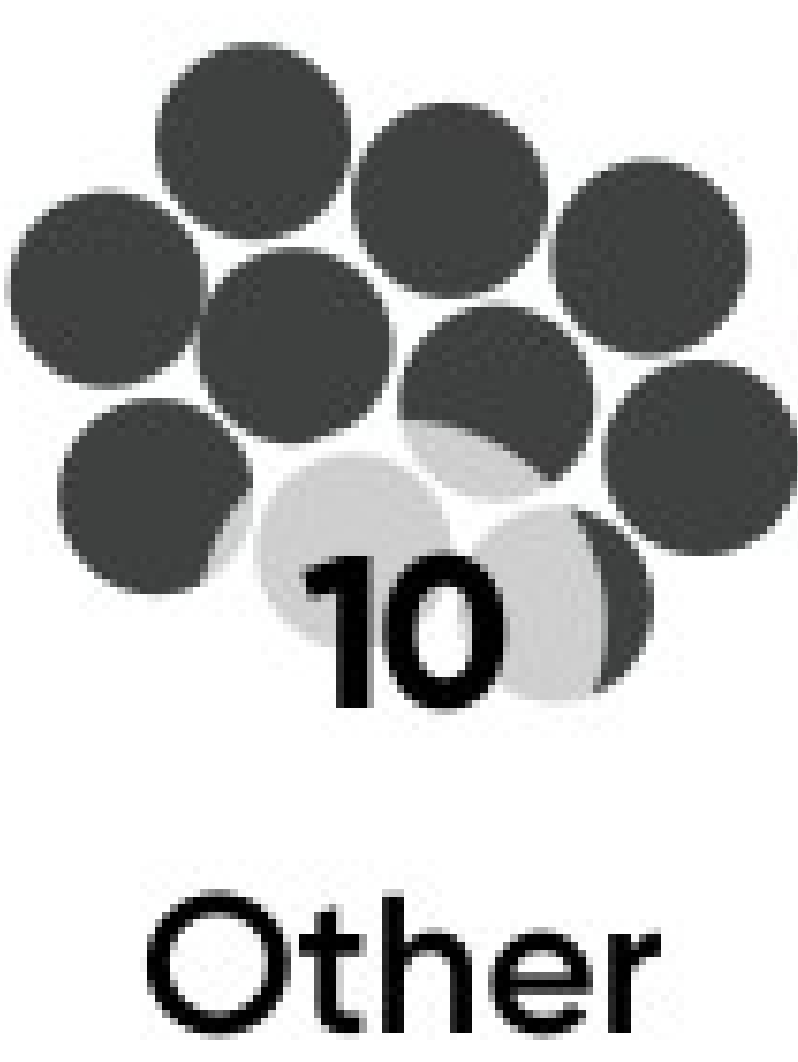
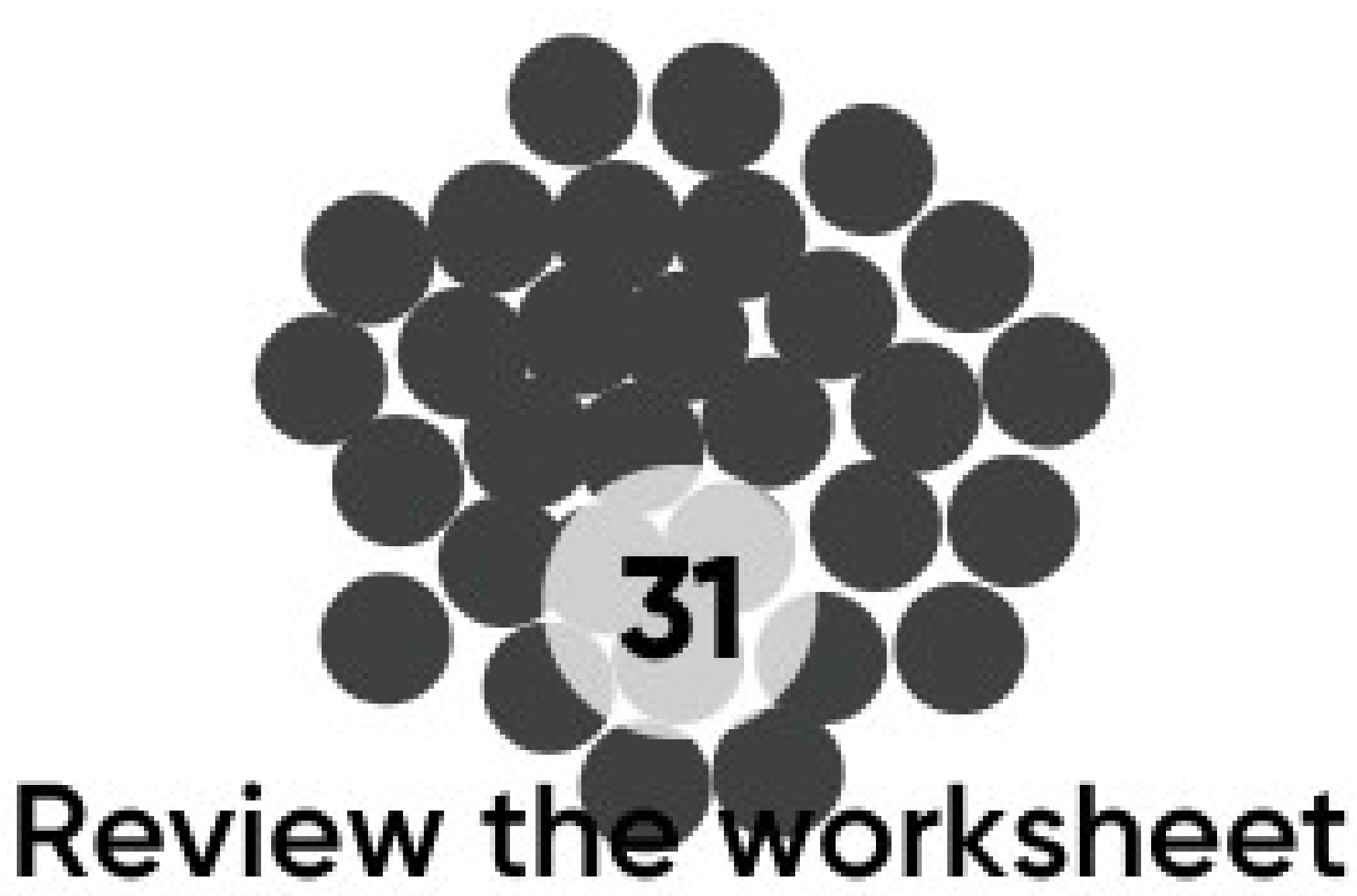
Over the next few weeks we'll cover:

- Orientation and Team Building
- Appreciation and Recognition

Did you attend or watch the Kick Off Session?



If you attended or watched did you:

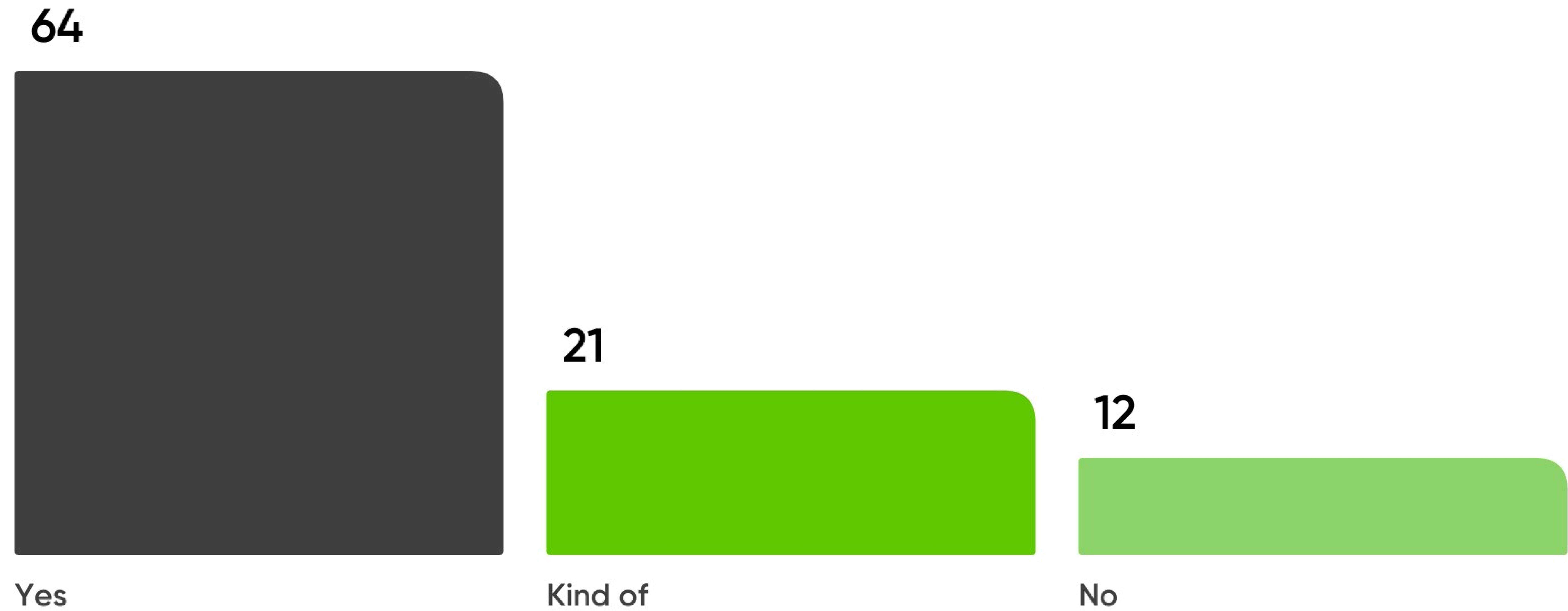


Creating Connections

Early relationships need more communication, support, and understanding.

- Automatic assumptions: from both the organization and the volunteer set up unrealistic expectations.
- Establish guidelines for what's needed and expected.
- Clear invitation process – allowing both sides to opt out.
- On-Boarding is not just orientation and training. (We'll dig into orientation next time.)
- Connect volunteers to: team/other volunteers, supervisor, work, clients, mission.

Do you make a specific invitation to prospective volunteers?



What's working with your current process?

Not much

Application and phone screening with all volunteers

Our digital application to be able to screen out more so than in the past

Our initial information session has been effective to help build the initial connection and help volunteers decide if the opportunity is a good fit.

Filling out check in form

Automation

Phone screening

application process

What's working with your current process?

Email and text

All of our volunteers just attend events, we don't have skill based volunteers. So we don't really have a process

Initial connection with prospect and interviewing.

Opportunity for one-on-one conversation

Clear expectations set at initial application

We jump on making contact.

sets clear expectations

Online application and phone call

What's working with your current process?

Detailed application

I meet with them via Zoom, ask for clearances, and perform training

Interviews

sending out welcomeing email letter explaining our organization to prospects

Word-of-mouth seems to be working, where our volunteers talk to their family members

Once we talk, I meet them one on one for coffee. The casual atmosphere generates amazing conversations and really helps set expectations.

Volunteer training

We invite our current volunteer base to join our new volunteer orientation for lunch to meet everyone.

What's working with your current process?

Online application to sign up for an orientation to get them used to using our online volunteer portal

fillable application

Very accessible because everyone can sign up on our website and join us! We have different tasks for different interests/skills.

Volunteer application and onboarding orientation

Google invitations for onboarding event

We post (advertise), then have a Recruiter do a screening call, followed by an more formal Intro Webinar, a 2nd round with a Functional Leader, then we go with onboarding

Consistent communication after the interview process

Application, phone screenings and one on one orientations

What's working with your current process?

Intro interviews for high responsibly roles

Application and phone interview

automation during check-in

First, overview of all programs through information session Get to know the prospective volunteers well through individual conversations about the role

Standardization across the organization

Zoom interviews

Application > Virtual interview > in person group orientation for newly onboarded volunteers

Virtual interviewing and sharing of expectations

What's working with your current process?

Spreadsheet to keep track of each volunteer

Using our network of referral partners for recruitment. Clear (but could be better) onboarding

Application form and interview process

phone screenings

Sending an email to make a meet for a tour of our community.

Asking for a specific time commitment

Inviting prospective volunteers to an "open house" to learn more about the volunteer program. Really helps with making sure we're on the same page with expectations.

Application, phone interview

What's working with your current process?

one-on-one
conversations

It isn't working

Our "job listing" attracts
interest, so we know at
least people are drawn to
our mission.

Easy Wufoo volunteer
application, email
communication, and zoom or
in-person meeting,
depending on if virtual or in-
person opportunity

The involvement of
current volunteers in the
process. Prospective
volunteers like to meet
current volunteers.

Info about the
commitment up front
on our website.

filling out an application
online, following up with
an email for interview

A new database that
helps us track through the
steps of application,
training, making them
active within a role.

What's working with your current process?

After the phone screening/
interview/background check, 2-day onboarding including a mock workshop on how to facilitate.

Comprehensive initial questionnaire with interests/experience, and optional demographics followed by call & email for next steps.

sending out welcome email explaining organization and opportunities

Using DocuSign is far more successful in receiving the first needed forms

shadow shifts before committing to a regular role or schedule

application process.
Back ground checks.

Online application form only

Moving volunteer recruitment out of volunteer operations has/will be helpful in matching volunteers with the right opportunity! It's a new move, so still a lot of process to work out.

What's working with your current process?

New Volunteer
Orientation held
monthly

Our registration form

Signup online, attend
orientation, and set
expectations.

info session and next
steps email

Screening through
email conversations

Complete application.
Phone screening.
Background check.

Send a welcome
card/sticker

Application Email
screening, do they
reapond?

What's working with your current process?

It's working well, I meet with them first and then send application form once they have indicated that they are still interested in volunteering.

Ours needs a lot of work

Learning more about the person as they continue to converse with the organization

Initial conversation, q&a

Our initial information session is working...we provide a great deal of info and expectations and paint the reality of volunteering with our program.

We are able to get volunteers started pretty quickly while still screening them.

Online self-paced training

Initial conversation helps us know a lot about communication skills, which will help us determine placement

What's working with your current process?

directly getting in contact with them after they sign up for our recurring or one time volunteer opportunities to start onboarding

Our application and volunteer interview process really works.

New online application submission to start the process

Volunteer interest form

Detailed application; in person training (like an audition)

Able to provide a good description of our opportunities before they sign up

Clear timeline & steps

I don't ask for a commitment until they're done with training

What's working with your current process?

Background checks for some assignments (working with people with disabilities)

Referral Bonus

Application online - Email response - background check - forward to site managers - the follow up needs a process because I am losing the one on one interaction at that point.

spreadsheets my documentation is fire rn

Marketing for new volunteers and/or getting referrals

We prefer volunteers to train in person but more and more want virtual only.

Long process.

Ongoing volunteer process is too long

What's working with your current process?

When they get a new job
- have to ramp and we
get pushed to the side

burn out, aging out,

The Vulnerable sector check
process takes a while for
Toronto applications
(sometimes a month to two
months). Makes the
onboarding process a lot
longer.

We have our software
integrated on the website, so
volunteers can sign up for
opportunities right away
without going through an
onboarding process. We
currently do not offer an
orientation.

What's not working with your current process?

Not enough structure

repetitive levels of screening (Ex - general online application, individual calls, and role-specific google form application)

Healthcare is highly regulated and this creates a long onboarding process.

Too many requirements for most casual volunteers

long onboarding times

Length of training and onboarding process.

Send applications & nothing happens

structure is a struggle

What's not working with your current process?

Our orientations are being treated as more of an informational session instead of committing to volunteering.

Not enough personal interaction

Application is barrier for some cultures that are more community based

We have volunteers recruiting volunteers. Confusion about whether someone is actually on board, or if they've left.

Lack of other staff participation.

volunteers not committing to opportunities after orientation

People not responding to us once they apply/enroll

not many options for low commitment

What's not working with your current process?

Retention, onboarding process will ghost us, or delayed onboarding

Waiting for clearances. It can take weeks to complete and that's where they normally disappear

After applications come in we will send an email to set up phone interview and we don't get a response

Dropping out right before or day-of events

After first orientation when they learn of our expectations – which is okay for our purposes

We are lucky and have a lot of longevity here.

The process is long.

Probably the step from application to engagement. Not having the capacity to do those 1-1 contacts that others mentioned in what was going well.

What's not working with your current process?

Consistency from program participants (unable to change due to population served)

We aren't able to get them up and running quick enough or they realize that they didn't have the time they thought they did.

Department support once onboarded

Not sure yet - we have a small volunteer program but we require physical and TB test and that could be difficult for potential volunteers to get

Volunteers can register and sign up for their first shift without every talking to another staff/volunteer.

Lengthy Application process

After I send to our site managers, I'm kind of "out" of the process until the end of the year when I count hours and give "thank you" gifts and certificates. I feel out of the loop and no connection

We only offer two trainings per year...so if someone demonstrates interest and we don't have a training for them for four months then they will probably lose interest.

What's not working with your current process?

Ongoing volunteer process is long

Too much time between expressing interest and receiving response

Volunteers being held to high expectations/being thrown into a role their first shift.

In the summer we will be in Salesforce which will make things easier, but for now I have to do everything manually in terms of keeping track and organizing

too many requirements, send app nothing happens,

It's hard to recruit because my organization is struggling to diversify volunteer job opportunities. It's limited.

So hard to get large groups together, we cover a fairly large area filled with tons of traffic. People love training wotj a group.

Volunteers not clear on their role & expectations. Role is more akin to a ft staff position.

What's not working with your current process?

When volunteers get to their location, the people that work there might not be as appreciative and supportive of volunteers as we would like

From application to signup is a gap

dislike or frustration with staff and management

The waiting game for follow up with program staff to make sure a vol is good to go

Delays throughout onboarding due to part time staff not having capacity to handle volunteers

Some volunteers are still not being screened out by onboarded that should have been.

Organization centric vs volunteer centric process

Some of our roles have training requirements, and season long time commitments, this doesn't work for everyone!!

What's not working with your current process?

Not enough structure or recognition
Confusion about their role and confusion from the leaders about their role

training requirement that isn't specific to our site

feeling of loss from core mission.

Delays between training and implementation.
Getting information about volunteer's expectations and commitment level as it changes

Having our Staff steward a volunteer when all of the staff is not comfortable with giving direction.

volunteers complete short interest form and then don't respond when program coordinators reach out with next steps

Lack of communication with active volunteers?
one comms we have with them is the bi-weekly newsletter, and monthly general newsletter

if volunteers drop out it is usually after the initial information session because of our paperwork, clearance requirements

What's not working with your current process?

volunteers not committing to opportunities after orientation Send applications & nothing happens

lag time between application and volunteer opportunity. our opportunities are mostly a 1 time or a long time between times so keeping their engagement and interest

We don't have an orientation process. We have two types of opportunities. 1. client facing 2. Events/outreach. Do not have separate process for them.

Lack of tools - we do a LOT manually because we are 100% volunteer-staffed and have no budgets for commercial tools

our orientations are more akin to tours than orientation

overwhelming

Online only application intimidates nontechnical people. Complicated steps

Length of time between initial contact and volunteer assignment

What's not working with your current process?

Lack of information on expectations for volunteer roles after onboarding

Dont show up for required background check (fingerprinting)

No dedicated Volunteer Manager, multiple people are responsible for various parts of the process.

lack of staff, and lack of engagement from executive director and board of directors

I don't have a follow up process and know I need one. I'm don't feel connected to them once I send them to our managers. I get very few responses to my "available volunteer opportunities" emails

No shows...lack of follow through

Volunteers can be in a different state where we don't have a lead to support them. Hard to keep a close connection from another location.

too many requirements, send app nothing happens,

What's not working with your current process?

Although it is very rare, it is disconcerting to meet a volunteer who does not know how to use the Internet.

Driving people to the website or to call us to start the process

A lot the client facing volunteers complete a lengthy training and then they drop off without letting us know. Not sure why. I think probationary period is going to be something I implement

staff not understanding that there is a process and thinking because they refer someone they can bypass the screening and other steps

Long wait times for Vulnerable sector check applications

Trying to be open and available to everybody

Automated emails and automated tracking

Streamlining the application

What's not working with your current process?

Shorter screening process

Potentially adding group interviews, rather than 1-1 interviews.

Reliable volunteers as I am one person running entire department without activities staff. Im starting from nothing here, so I have been trying to think outside of the box to ask for needed help.

What's one think you could add or change that could improve your invitation process?

More calls to assist in steps

information sessions,

Eliminate one level of online screening in favor of 1-1 conversations

sending prescreening questions before phone conversation is had

Making phone calls to the potential volunteer to find out more about their interests

Finding a shift to get someone signed up within a couple weeks of application

creating a volunteer tier list to clarify expectations of incoming volunteers

Adding more conversation about expectations

What's one think you could add or change that could improve your invitation process?

exploring the idea of "speed interviews" for more quick screening

Training specific to site rather than broad/org wide

Better communication and following up

Establishing a formal process for all volunteers - one that involves staff

Ask for expectations of the volunteering prior to actual volunteering

Provide more orientation before offering the position and moving to training

Be able to promise a social element

writing the volunteer opportunity to be something exciting or in a way that connects with the volunteer

What's one think you could add or change that could improve your invitation process?

Definitely having info sessions

provide specifics about what to do on day one for the different positions.

Documentation about our expectations -- and process for volunteers to communicate and document theirs

approaching first contact after their interest form as more of a conversation rather than immediately filling out application to get started

Having 1-1's more frequently.

after our info session I send an email with the application and clearance instructions. asking the prospective volunteer if they want this email or would like to think about it more before committing

Remove our opportunity listings from our website, just leave the application.

Get better referral sources for driving folks to start the brief online application

What's one think you could add or change that could improve your invitation process?

stop asking for a CV
for a volunteer job

More phone and direct
contact

Additional training and
connection

Strengths identification so
we can make a good fit.
Manage expectations

More follow-up for
sent applications

hosting information
sessions for people who
expressed interest but
never responded to us

Instead of 140 page
training manuals, have
video info sessions
instead

checking in 1-2 times
instead of just the
initial comms

What's one think you could add or change that could improve your invitation process?

More concise explanation. Volunteers need to quickly and easily understand the role

Understanding their motivations to volunteer.

Better communication about what the volunteer role is

Eliminating unnecessary documentations in onboarding process

Somehow make timing clearer before people fill out the application without having people show up without going through the process

Clear expectations on both sides

Next step timeline. Info session, determining a timeline for next steps. Orientation. Educating staff and asking for their buy in

Eliminate one level of online screening in favor of 1-1 conversations writing the volunteer opportunity to be something exciting or in a way that connects with the volunteer Making phone calls to the

What's one think you could add or change that could improve your invitation process?

Always let them know that I will be with them on their first visit. Takes away alot of anxiety.

offer 15-minute coffee chats/q&a's in case they have questions

Streamlining the application process and focusing the orientation and onboarding

Ask for more information from volunteers up front about what they want to get out of the experience

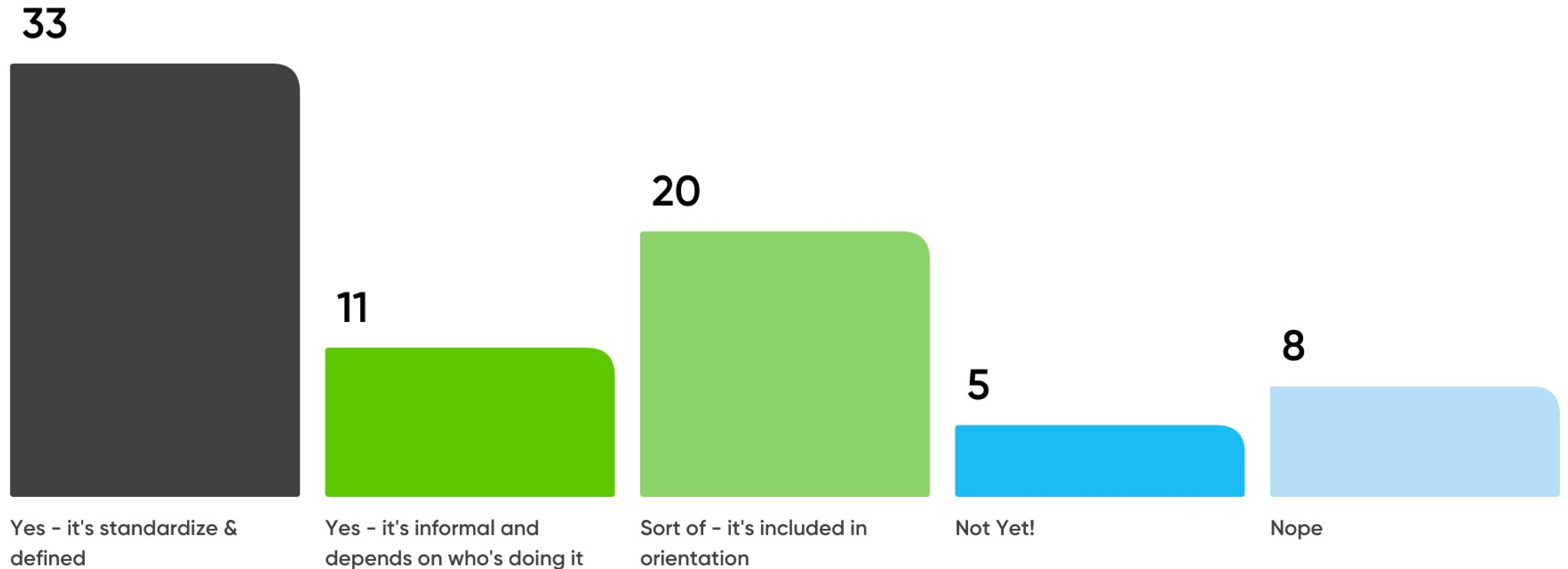
I made an invitation corkboard with calendars, name tags, welcome area with sign up sheets for avtivities, and try to keep it open to gain their likes to do what they enjoy while volunteering.

Testimonials from past volunteers to envision what it will be like for them

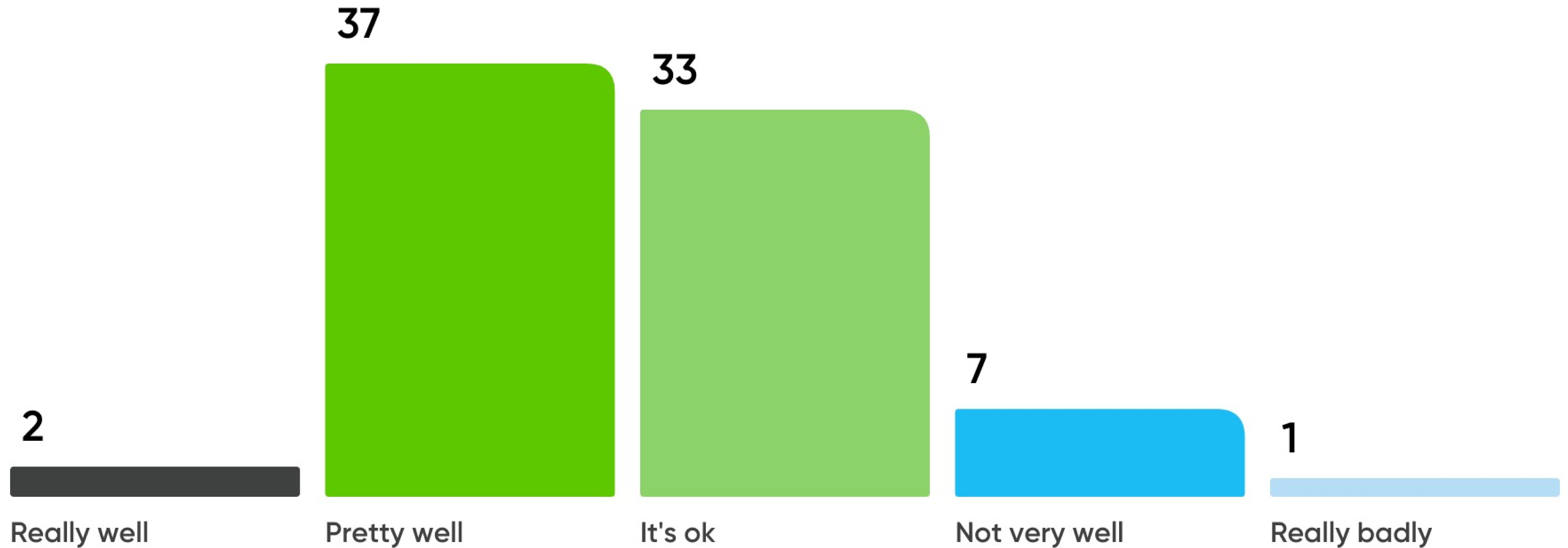
More time during interview to make a connection, instead of always being in a rush

First day greeting / meeting all staff and a volunteer

Do you currently have a separate on-boarding process?



How well do you think your current process is working?



What do you think is missing from your on-boarding process?

I'm not sure

A process

Job shadowing

a volunteer manager

Volunteer community

Mentor at site

Handbook

More in person contact, conversations with veteran volunteers. I like job shadowing.

What do you think is missing from your on-boarding process?

it's different for every
volunteer role

Mentor/partner
volunteer is a great
idea

more information,
mentors, shadowing,
an overall process

I think a one on one
introduction or personal
interaction would be
helpful

Not sure

Establishing realistic
expectations prior to
volunteering

More conversation
with new volunteer

Continued training once
people start a volunteer
role to make sure they are
comfortable

What do you think is missing from your on-boarding process?

Better timeline.

Making sure the right,
especially basic, info is
shared

Personal touch

Process

More volunteers

process

Better follow up after
they start

More support as they
first get started

What do you think is missing from your on-boarding process?

Issuing badges

specifics, detail
description or policy
for the organization

Less forms to sign!!!!

A more immediate
opportunity. There is some
delay between
orientation and first
activity.

Survey on things are
going once onboarded

Mentor/volunteer
buddy

Community and
relationship building
amongst volunteers and
program staff.

structure

What do you think is missing from your on-boarding process?

making expectations clearer

More relational aspects

Time to actually onboard as Im thw only person running and engaging a community in activities wirhout actual staff.

The opportunity for volunteers to say they are no longer interested after doing an interview

An explicit plan to connect volunteers with one another for support and connection

Probationary period mentor info sessions

mentor at site

Google drive folder with resources they can access at anytime (working on it!)

What do you think is missing from your on-boarding process?

follow up after they onboard

co-workers who can help

better orientation or training in some volunteer roles

Clear expectations of what a volunteer is or the roles they will serve in our specific organization

Utilizes other staff and sometimes there's not by in

In person contact

All-staff communication about standard process so that it can guide folks even if they go around me in recruiting and on-boarding volunteers

streamlining communication

What do you think is missing from your on-boarding process?

More connections

Making time for getting to know each other, learn how to facilitate, reflecting on what you bring, as a volunteer, to our program

Clarity on what they're supposed to do, how to do it, and who they can turn to for help

Being more intentional with scheduling check-ins with new volunteers

Better timeline

A software platform to manage volunteers, documents, etc

We do everything virtually. Need more one on one contact among the volunteers and the staff.

The process is super flexible for volunteers but hard on my schedule

What do you think is missing from your on-boarding process?

Have a mini social where returning volunteers meet newly onboarded volunteers.

What one specific thing could you start doing to help volunteers feel more welcome in your organization?

shadowing and mentoring

Host quarterly coffees

Offer swag after a certain number of sessions

Community volunteer group/ peer-to-peer interactions

Introduce them to other volunteers

More recognition

Doing more check-ins

Train staff on volunteer appreciation

What one specific thing could you start doing to help volunteers feel more welcome in your organization?

Meet with more staff
during on-boarding

In person on boarding

Personal phone call to
each new volunteer

Name tags

Follow up with them
after they have
volunteered a few
times

Send a welcome card
to their home

during training, check in
with 1-2 volunteers after
each session to say thank
you for being here and
see if they have questions

Find ways to facilitate
building community with
staff and other volunteers

What one specific thing could you start doing to help volunteers feel more welcome in your organization?

Maybe have another volunteer reach out to them in their first couple weeks to see how things are going.

Host extra meetings/fun events

more communication

Reach out to sites to gain support from their volunteer team

More opportunities to meet other volunteers

Meet other volunteers and staff

Quick response and processing

Someone who is there on their first shift and knows they are new to greet them and thank them for joining us!

What one specific thing could you start doing to help volunteers feel more welcome in your organization?

Meeting them in person, not just virtually.

introduce them to others name tags

More role info before they sign up

in person appreciation events and trainings

Offer office hours/connect sessions for volunteers to talk about what is going well/what isn't

Volunteer group socials

Conneting with other volunteers in person.

offer a mix of in-person and virtual opportunities. some of our volunteers are close and like in person things and others live further away.

What one specific thing could you start doing to help volunteers feel more welcome in your organization?

Schedule in-person meetups for the group, weekly check-in calls

Volunteer check ins

Have mentors that help connect with them and have a stream lined proces withthem.

Make sure they feel connected

We take volunteers for coffee/tea quarterly

Introducing to the staff they are working with

Welcome card! Genuine excitement and enthusiasm for their commitment

Monthly meeting over coffee

What one specific thing could you start doing to help volunteers feel more welcome in your organization?

More appreciation

Welcome and thank you card signed by our director.

A welcome video . We're also in the process of developing an orientation.

Multiple volunteers onboarding at the same time to create a community

Hosting quarterly events/gathering allowing our new and seasoned volunteers to mix and mingle and meet staff-in real life.

phone call

Handwritten thank you cards.

Contact them after the first volunteer task

What one specific thing could you start doing to help volunteers feel more welcome in your organization?

I give a tour and make it fun and open to engage with elders. They can join in the fun and bring the fun

More reliably check in after their first shift to see how it went

All remote volunteers so as much opportunities for connection as possible

An FAQ resource document

Invites to company team building events

Introduce them to more staff

Welcome corkboard area to welcome to the team

What's next?

Get ready for next week!

- Recording and slides + Invitations and On-boarding worksheet will come to you tomorrow.
- Consider who else could or should be involved – paid & volunteer staff, and start some conversations.
- Explore how you might gather feedback from volunteers – if you aren't already.
- Review your current orientation process, and team building activities before next week.

Thank You!

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