Onboarding volunteers

Introduction

For your team to succeed, they need to know their goal and how to achieve it. An effective **onboarding** process is the best way to make sure volunteers have everything they need to begin their new role informed, supported and excited to contribute.

Onboarding is how your organisation integrates a new member of the team. This process can begin when a volunteer accepts their new role and last all the way until they are working with the same independence and confidence as their colleagues. An effective onboarding process covers how new arrivals are welcomed, introduced to other staff and trained for their role, as well as the resources and support they receive during this time.

A new volunteer's experience during the onboarding process has a large influence on their motivation to continue in the role. Investing the time to successfully integrate new starters helps demonstrate the value your organisation places on volunteering.

How to use this guide

This guide provides practical information about inducting, training and supporting a volunteer as they join a host organisation. It provides suggestions and prompts to serve as a starting point when creating or updating your organisation's onboarding process. They will need to be evaluated against the needs and scope of the volunteer role and customised as required.

Contents

National Standards for Volunteer Involvement

The National Standards for Volunteer Involvement provide a framework for organisations to consider the role of volunteers and the impact effective volunteer involvement can have on achieving the strategic goals of the organisation. Created by volunteering peak bodies across Australia, they allow organisations to make use of simple, practical criteria across a broad range of volunteering situations.

Volunteer involving organisations are encouraged to consider the National Standards when developing their onboarding process. Standard 5 is the most relevant standard to a volunteer's onboarding experience.

Standard 5: Support and Development

Volunteers understand their roles and gain the knowledge, skills and feedback needed to safely and effectively carry out their duties.

5.1 Volunteers are provided with orientation relevant to their role and responsibility.

5.2 Volunteers' knowledge and skills are reviewed to identify support and development needs.

5.3 Volunteers' knowledge and skill needs relevant to their roles are identified, and training and development opportunities are provided to meet these needs.

5.4 Volunteers are provided with supervision and support that enables them to undertake their roles and responsibilities.

5.5 Changes to the involvement of a volunteer are undertaken fairly and consistently.

For more information on the National Standards, visit:
www.volunteeringaustralia.org/resources/national-standards-and-supporting-material

What you will need

What an onboarding process looks like will differ between organisations and roles, but there are some key elements that should be included every time a volunteer joins an organisation. At a minimum, onboarding a new volunteer should involve:

1. An induction that covers the core aspects of the organisation and the position, including all workplace health and safety information. This must be completed before the volunteer starts their new role.

   - Its content needs to be consistent with the position description used in the recruitment process
   - It should be presented in a way that is accessible to people with a variety of backgrounds and abilities – a printed copy with images, icons and a large, clear font can help
   - The volunteer must have a clear understanding of the requirements, responsibilities and support available for their role. Double-check that they understand and set aside time for questions

2. Any **policies and procedures** that are relevant to the volunteer

   - You may need to include details of your organisation's volunteer insurance
   - The volunteer should confirm in writing that they understand the content
   - You should provide copies of the most important policies and the volunteer should know where they can access other policies.

3. A **volunteer agreement** that clearly outlines the duties, expectations and voluntary nature of the role. This should be signed and dated, with a copy given to the volunteer

4. A **safe environment**, ensuring volunteers have any personal protective equipment that they may need.

Depending on the needs of the role, you might also be required to verify or log details of licences and other credentials. In some cases, you may also need to enter into a legally binding agreement with the volunteer regarding the ownership of intellectual property or the privacy of confidential information. If this is needed in your organisation, you will need to seek legal advice before creating and executing (signing) this document.

Why is onboarding important?

There are many reasons to have a structured onboarding process, with benefits for both the organisation and the volunteer.

Benefits for the volunteer

- **Confidence** that the organisation is well-run, values volunteering and will provide support going forward. Without an onboarding process, new starters might feel confused, isolated and unmotivated to continue.
- Better **morale** by teaching volunteers how to succeed, rather than leaving them to learn through trial and error.
- Opportunity to find out what **impact** the volunteer can have and whether the organisation's values align with their own.
- A thorough **understanding** of the organisation and role.

Benefits for the organisation

For the organisation and volunteer manager, designing an onboarding process is a very useful exercise. It gives you a chance to look at your organisation from a fresh perspective and check that your best intentions are backed up by best practice. Other benefits for the organisation include:

- Ensuring **compliance** with any legal requirements, for example:
  - Establishing the volunteer relationship, confirming the voluntary nature of the role, and volunteers' rights and responsibilities
  - Workplace health and safety training
  - Verifying or applying for any necessary licences, certificates or credentials
  - Checking the volunteer has read and understood relevant policies
  - Complying with your volunteer insurance coverage
  - Record-keeping for the above

- Delivering a **consistent experience** for volunteers. Without a process in place, staff may deliver conflicting information or leave out important details

- **Saving time** by:
  - Creating standard documents and templates that can be re-used elsewhere
  - Reducing the number of documents and forms that have been lost or missed
  - Allowing volunteers to get up and running more quickly, to be more productive and to make fewer errors that need to be corrected by other staff

- Making an excellent **first impression** that teaches the volunteer about your organisation's **standards and culture**.

Do you need to focus on your onboarding?

There can be many signs that your organisation needs to focus on its onboarding process, such as:

- No existing process in place
- High turnover among new volunteers
- Documents, records or other data being lost, logged incorrectly or hard to find.
- Needing to go back to team members with information, forms or resources that had been missed
- New starters having an inconsistent experience when they join the organisation
- Presenting out of date information to volunteers
- New volunteers repeating similar errors, misinterpreting information in similar ways or asking similar questions
- Difficulty achieving consistent team culture among new staff
- Recent expansion or restructure within the organisation
- Feedback that volunteers felt uninformed, unsupported or uneasy when starting their role.

Finding the right process

Beyond the minimum requirements, deciding what to include in your onboarding process will depend on the needs of the organisation and the role.

In short-term roles, such as event volunteering, an induction during or before a volunteer's first shift may cover everything needed to ensure they are participating in a safe, positive and productive way. For longer-term positions, you should also consider:

- Creating a **volunteer handbook** that can be referred to throughout the onboarding process
- Sending information and resources before the volunteer's first day, as part of **pre-boarding**
- Ongoing **training** after their initial induction - the knowledge required for volunteers to succeed often can't be covered in one training session
- A milestone to **review** and complete the process, sometimes three to six months later
- Opportunities for new volunteers to **socialise** or collaborate with staff outside their immediate team.

If your organisation has multiple volunteer roles, you might need a different onboarding process for each. Different roles or teams may also share a general induction before splitting up for role-specific training. Requiring volunteers to complete training that is irrelevant to their position distracts from more important content, wastes resources and risks disrespecting the volunteer's time.

As your organisation changes, your onboarding process should change too. You might be affected by internal changes, new legislation or a shift in your organisation's scope. When new volunteer roles are created, or if you receive relevant feedback, you should revisit your onboarding process to check it is effective, relevant and aligned with your organisation's aims and values.

Ensuring your organisation has an effective onboarding process is one of the best investments you can make. Think of onboarding as your chance to make a positive first impression, make the volunteer feel welcome and set the tone for the volunteer's involvement going forward.

Stages of onboarding

For roles longer than two to five shifts, the onboarding process should be delivered in multiple stages. Splitting up content can help you customise the process for different roles and provide the right information at the right time.

Too much content can be overwhelming but asking new volunteers to start without having seen the content can leave people feeling lost. Similarly, rushing through training can mean it doesn't sink in, but keeping someone in training for too long can make their time feel unimpactful. Investigate which approach is right for you and regularly review your onboarding process to reflect feedback from the team.

Before onboarding - recruitment and selection

Before a volunteer joins a shift, you should have completed a process for recruitment, selection and screening. Your recruitment and onboarding processes may overlap. For example, signing a volunteer agreement may occur early in the onboarding process and also be the last step for recruiting that role.

Pre-boarding - before their first day

Think about what can be sent to the volunteer before they join your organisation for their first day.

- Filling in forms at home or online can allow more time for onboarding activities.
- Sharing the volunteer agreement early gives them time to think of questions about the role.
- You might have documents, videos or links that provide general information about your organisation. This can help give context for what they learn in the induction.
- Make sure your new teammate knows when and where to meet, how to get there, your contact information and anything they need to bring. Ask them what their preferred method of communication is ie. email, text, phone etc.

If the volunteer hasn't started in their role yet, it's important to note they may not have set aside time for this process. You should allow time for anything they couldn't complete in their personal time.

Induction - their first day

Aim to strike a balance between training, getting to know the team and getting started with entry-level tasks. Allow plenty of time for questions and make sure that the volunteer feels welcome as they find their feet.

- This is your chance to make a great **first impression.** Some volunteers will decide whether to continue in the role based on their experience today.
- Schedule a **safety induction** early. Discuss evacuations, amenities, incident reporting, equipment and any hazards that may be present.
- New starters should receive an **induction**, sign an **agreement** and formally commence their volunteer role before performing any duties.
- If you sent some items through before the volunteer's first day, check they have understood them correctly.
- Include **hands-on activities** that indicate what the role is like day-to-day. If you can, show the volunteer the impact they made in their first session and how this helps your organisation.
- Consider a **debrief** at the end of the day. How is the volunteer feeling? Did they experience any challenges? What did they enjoy most? Do they have any questions?

Remember: there's a lot to take in on someone's first day. Volunteers aren't just learning what's covered in the induction – they're also becoming familiar with the workplace, meeting the rest of the team and getting a feel for your organisation. Content that you find easy might be new and challenging to someone else.

Onboarding and ongoing training - shift two, three and beyond

The volunteer is ready for their next shift – great! But their onboarding likely isn't over yet. At this stage, a new volunteer is still getting a feel for their role and your organisation's operations, goals and values.

- Finish going through any policies or forms that weren't completed earlier.
- These shifts should present new information that builds upon what the volunteer learned previously, while also revisiting the core ideas from their first day.
- Don't assume that the volunteer remembers everything from their first shift. Double-check if they're confident with what they've learned so far and provide additional support if they seem unsure.
- Is there anyone in the team the volunteer hasn't met yet? It can be useful to find ways for new volunteers to form connections with people outside their immediate team.
- Let the volunteer know the impact they've made after their first week, first month or at a suitable milestone.

Review, feedback and onboarding completion

A comprehensive onboarding process extends beyond a volunteer's initial training and signing policies – it may take weeks or months. When the new volunteer is contributing with the same level of confidence and independence as other team members, the onboarding process has been completed successfully.

- Schedule a meeting for feedback and review. Use this opportunity to celebrate their achievements and provide constructive feedback
- Ask for feedback to help improve your onboarding process: did they receive the right information at the right time? Is there anything that didn't make sense? How was the balance between training, socialising and work? Did they feel supported during this time?

Developing your onboarding process

Designing and maintaining your onboarding process requires investment and input from across the organisation. Try to incrementally build and update your process over time, reflecting recent organisational changes, new technology, feedback from the team and your developing skills as a manager of volunteers. Each new starter is an opportunity to further develop and refine the way you integrate volunteers into your team.

Creating an onboarding process from scratch

Don't feel overwhelmed if you need to create a new process for your organisation – you likely have existing sources to draw upon to get started. Adapting existing content doesn't just save time, it can also keep your messaging and visual design consistent.

Focus on the essentials

At first, prioritise the make-or-break parts of your onboarding process and check you meet the minimum requirements.

Start by making a **general plan** for the volunteer's first day, for example:

- Meet-and-greet
- Induction
- Completing paperwork
- Supervised entry-level duties
- Wrap up

- **Workplace health and safety** is paramount. Be ready to deliver a safety induction on the first day, including reporting, safe practice, protective equipment and evacuation procedures. You should also know the details of your volunteer insurance policy

- Have necessary **paperwork** ready to go, like the volunteer agreement and key policies

> **Don't think you have any material to work with?**
>
> Check if your organisation has anything you can use from these sources:
>
> - Onboarding process for paid staff
> - Your organisation's website
> - Social media accounts
> - Volunteer role description
> - Marketing material
> - Brand identity and style guide
> - Grant applications
> - Employee position descriptions
> - Annual reports
> - Safety inductions

- Good record keeping. If paperwork or data is stored inconsistently, it may be lost. These may be required later for legal or insurance reasons, or to access contacts in an emergency

- A general **induction** for the role. At first, prioritise the content over the presentation. As you write the induction, think about the how and the why of the volunteer's role. How questions help describe basic operations and what to do on-shift, while why questions help with problem-solving and understanding the purpose of the role.

- Think of some feedback questions that will help with improvements in the future. This is especially important with a new onboarding process

  - Was there anything that didn't make sense at the time?
  - Was any information missing? Did anything seem unnecessary?
  - Was too much time spent on an item? Did anything feel rushed?
  - Does the volunteer have any tips for a better experience?

Once you've covered the basics, you can focus on making improvements. Preferably, your onboarding process shouldn't just be informative, but also positive, welcoming and inspiring.

Updating an existing onboarding process

Just as your organisation changes over time, so too should the way you welcome and train volunteers. When you're working with an existing onboarding process, try to focus on a specific problem you'd like to solve.

Content

- Could the process be updated to help with common **mistakes, misconceptions** or **feedback**?
  - Do you often get asked the same questions? Do people make the same errors?
  - Are you collecting feedback from volunteers?
- Is any information **out of date**, or going to be out of date soon?
- Is there anything that isn't **documented** or standardised?
- Have there been any recent **changes to legislation** that affect your onboarding process?

Presentation and structure

- Is your onboarding process **engaging** and **motivational**?
  - Does your induction or ongoing training include a presentation? Think about adding videos, quick activities and multiple speakers to keep people engaged. Try to keep the presentation short and focused, with time for questions.
  - Can any long-serving volunteers speak about their experience and reason for being involved?
  - Can new volunteers clearly see the impact they will make?
  - Don't exaggerate the benefits of the role if you know the experience won't match up.
  - Let other staff know about the new volunteer and encourage them to say hello.
- Is the existing process **accessible** to people with a variety of backgrounds and skillsets?
  - If you find that some people understand and others struggle, this may be the cause.
  - You can accommodate different abilities and learning styles by using large type, simple wording, practical examples, instructional graphics, or printed copies that volunteers can follow along with.
- What is the **best part** of the onboarding process? Can the rest be raised to that standard?
- Is the **look and feel** of documents and presentations consistent?
- Is there any **double-handling** across your organisation? If each team runs its own onboarding process, see if any core components can be handled centrally
- Is there any **new technology** you want to adopt?

EXERCISE

Work backwards

Not sure what you need to cover in your training or handbook? This exercise can help you brainstorm different points to include.

First, pick something a volunteer needs to know for their role.

- Hmmm … They need to know that items that were purchased on sale can only be refunded for their sale price, not their normal price

Then think about what someone needs to know to use this information.

- How can you tell if an item was on sale?
- Which items can be refunded?
- Does a supervisor need to give permission before an item can be refunded?
- How is this recorded in the till?

Continue working backwards from each piece of information until it's suitable for someone's first shift.

EXERCISE

Ask a friend

Talk to someone outside of your organisation to help brainstorm ideas for your onboarding content.

- Let them ask you questions, as if they were a volunteer starting on their first day. Make note of what questions they ask and include this information in your onboarding procedure

- Make a list of key points you'd like new volunteers to remember from your onboarding. Take your friend through a mock training session and ask follow-up questions to check they understand

Other tips

- Archive old onboarding material for reference.
- Always consider the volunteer's experience and respect their time. Have everything prepared and make sure that the scheduled activities are worthwhile.
- Volunteers can be very enthusiastic early on. Leverage this to help make a great first impression. Is there anything interesting or exciting you can show them on their first day?
- Demonstrate the commitment to volunteering from across your organisation. A volunteer manager is expected to welcome new arrivals, but it can be a pleasant surprise to be welcomed by the CEO, chair or other managers.
- Are your organisation's key values coming across in your onboarding content and presentation?
- Remember to include breaks in the schedule. If the volunteer doesn't know the area, suggest local lunch options. If your team eats together, remember to invite them.

Wrapping up

To mark the end of onboarding, you may want to schedule a meeting with the volunteer. Use this opportunity to celebrate their progress, collect feedback and check they completed all necessary steps. At this stage, volunteers will have valuable insight on the onboarding process and whether it adequately prepared them for the role. Use this information the next time you conduct a review of your onboarding process, which should be at least once per year.

Onboarding is not only an essential part of volunteer participation, but also a great opportunity to imbue new teammates with your organisation's values. While a successful onboarding process requires a time investment to set up, it will be repaid through improved volunteer retention, productivity and morale. Find what works best for your team and give them an informative and welcoming start to their volunteer journey.