VOLUNTEER PROGRAM

OPERATIONS MANUAL

This is a template to use as an operational manual for establishing basic stand operating procedures for a volunteer-based organization.

Note: To make best use of this manual, view online. Go to View>Show and select the Navigation Pane. Microsoft Word heading styles have been applied to the headings in this document. Choosing to view the navigation pane will allow you to navigate to a specific page or heading within the document. You can use the Navigation Pane to get a clear understanding of the logical flow of the document's contents.

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INTRODUCTION

Volunteers are the heart of any well-developed community based nonprofit organization. Recruited to assist in the mission delivery, volunteers are the operational backbone of many organizations. As such, it is essential to provide a strong foundational infrastructure to your volunteer program's development. Doing so helps to ensure that your time and effort are not being wasted by keeping your volunteers engaged.

The Volunteer Program Operations Manual has been created to guide you in the fundamental principles of volunteer program development and administration. Volunteer administration encompasses all the tasks and activities that are needed to build and maintain a healthy and vibrant volunteer program strategically, tactically, and operationally.

This manual will provide a reference point for each phase in the volunteer development process. The phases are presented in the order of the lifecycle of a volunteer's involvement with the organization but note that the steps may take place simultaneously. Each stage is related to the others but unique in its own tasks and activities.

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INTAKE AND ONBOARDING

The objective of the Intake and Onboarding phase is to ensure that all volunteers entering the program do so in a consistent manner that provides both the volunteer and the organization with adequate information about each other for the purposes of clarifying expectations and assessing fitness of job placement.

Intake and onboarding tasks include recruitment as well as the volunteer application process. Intake refers to the tasks and activities needed to formally register a community member as a vetted member of the organization. This is necessary for risk management; establishing a process to define how someone is identified as having the title "volunteer" in your organization provides scope and role boundaries.

Reference checks and interviews are a part of the intake process. Both reference checks and interviews are subprocesses that are embedded into the intake process.

While intake involves the tactical steps required to move a community member from potential to active volunteer, the onboarding tasks and activities are those that integrate the new volunteer into the organization. These tasks and activities help to solidify the relationship with the volunteer and establish belonging. Orientation and early recognition activities are part of onboarding.

Volunteer Intake Process

Overview

The volunteer intake process guides the potential volunteer through the steps necessary to register officially with the organization. At various points in the intake process, there are places where the process may terminate and/or where other processes start and run concurrently. As intake tasks and activities are completed, the applicant stages are identified.

As not every potential volunteer will complete the intake process, it is necessary to have the stages defined, what sets it in motion, and its output. During the intake process, the stages need to be closely monitored to keep it in motion.

The following terminology is used when defining the stages of volunteer intake. Each stage is further defined in the Volunteer Intake Process section.

STAGE	INITIATED WHEN	INTAKE/ONBOARDING
Potential	Interest Expressed	Onboarding information
Applicant	Application Received	References, Interview
Prospective	Volunteer Accepted	Orientation, Training,
Active	Assigned Role	Uniform, Name Badge, Shift/Schedule
Archived	Progress Terminated	Archiving

Definition of Terms

While all unpaid staff are volunteers, for the purposes of policy and procedure, the following terms will assist in defining the type of volunteers and what is expected of them during the intake and onboarding phase.

Types of Volunteers

A "volunteer" is anyone who chooses to perform services for an organization without compensation or expectation of compensation and who performs a task at the direction of and on behalf of the organization. Volunteers may be individuals or groups and perform recurring support activities or help out at a single event.

Volunteer	A volunteer is someone who provides routine and ongoing support for which the operations of the ***[Nonprofit Organization]***'s key educational and promotional activities would otherwise not occur (e.g., gallery greeters, educational assistants, special events).
Youth Volunteer	A youth volunteer is a school-aged young person between the ages of 14 and 17 who volunteers. Youth volunteers may function in episodic, group, or recurring volunteer roles. A 17-year-old who has completed high school is not considered a youth volunteer and should follow the general volunteer guidelines. For youth under the age of 14, see Group Volunteers.

Youth volunteer indicate is described in further detail in the section entitled Youth Volunteer Intake.

Episodic Volunteer	An episodic volunteer is someone who provides a specific skill or service for a single day, event, or activity and is not expected to repeat that activity at a later date (e.g., a handyman who paints the building; a friend from out of town who want to help with an event)
Group Volunteer	A group volunteer is a civic or service group that volunteers their time together. While the service activity may repeat, the actual individual members participating are subject to change. (e.g., 4-H, a sorority, Rotary, a university class) A group can also be a youth between the ages of 10-13 who are accompanied by their parent/guardian. See Youth Volunteer Intake for additional information.

Informal Service Work

Community members who perform acts of service for the Center without being registered through the volunteer program are not defined as Volunteers for the purposes of the operational procedures and operate outside of the Center of their own volition and assume the risk thereof.

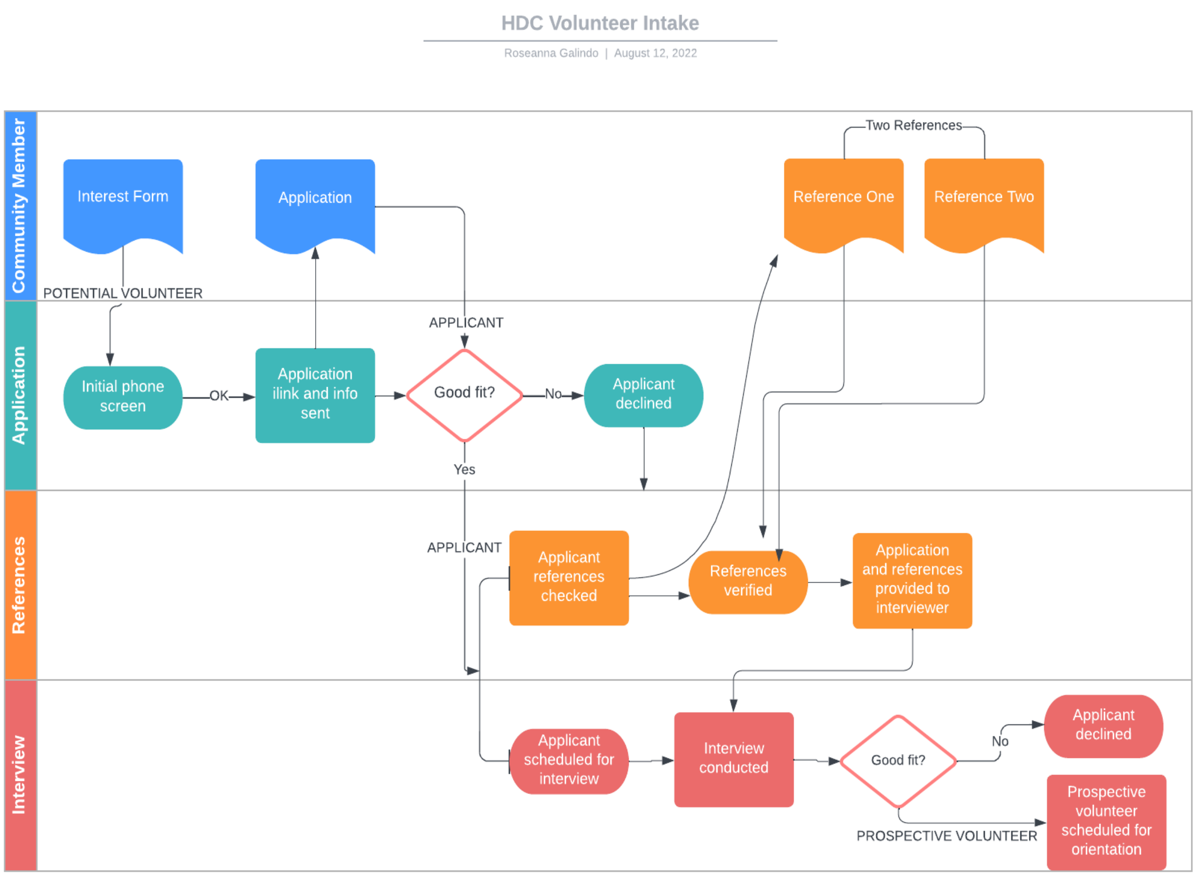
These include:

- Anyone who has not been formally approved by the Center for volunteer service.
- Anyone who has not formally applied to and onboarded through the volunteer program.
- Individuals between the ages of 14-17 without formal parental consent.

Volunteer Intake Process

The volunteer intake process describes the tasks and activities necessary to move a community member from a potential to an active volunteer with the organization. Volunteer intake involves the subprocess of reference checks and interviews.

Intake Process Map



Intake Process Steps

The following steps describe the intake process from the time a community member expresses interest through their active service in the program.

Potential Volunteer

A Potential Volunteer is anyone who expresses interest in formally registering with the organization's volunteer program. The community member's interest in volunteering is captured and the person is now referred to as a Potential Volunteer.
Interest may be generated from a variety of sources. Some sources of that community member use to communicate an interest in volunteering have included:

- Website interest form
- Social media messages
- Event sign-up forms
- Direct messaging
- Friend referral
- Volunteer application

An Onboarding Tracker Form is created for each potential volunteer. The form is a manual tool that is helpful for keeping track of the tasks, activities, and communication around the intake process. The form includes prompts for contact as well as for database entry. The Onboarding Tracker Form can be found at the end of this section. Alternatively, onboarding can be tracked in the volunteer management software directly.

Potential volunteers are contacted by a ***[Nonprofit Organization]*** representative. Example scripts for communication for this stage as well as other stages of the intake process are included in the appendix of this manual.

Initial contact provides welcoming information including a link and invitation to complete the formal application, if not already done so. The initial contact should also include information about the intake process. Provide potential volunteers with what they can expect from the intake process, what will be required from them, and how long it will take.

Having a clear and thorough process will help you to identify potential volunteers early who may not be a good fit due to time, interest, or other factors. It is completely acceptable to archive a community member at any stage of the intake process if moving forward is not desired, recommended, or needed.

Potential volunteers should be contacted several times using a mix of both email and phone to elicit the application. Archive the potential if no response is received after several attempts. Record the archive date on the tracker form.

Once a potential volunteer has submitted their completed online application, they are now identified as an Applicant Volunteer.

HDC Volunteer Onboarding Tracker

☐Applicant Active Date_________________ *☐Applicant Archive Date_____________*

STATUS: POTENTIAL VOLUNTEER

Name: ______________________ Email/Phone: ______________

Interest Date: ______________________

Interest Source: ______________________

☐Adult ☐Youth

dob:

☐ Application Date Received: ______________

Contact Date Notes

☐ Confirmation email sent___________

☐ Applicant status assigned___________

Youth: ☐Parental Consent form sent___ ☐Parental Consent recv'd____________ ☐Archive

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STATUS: APPLICANT VOLUNTEER

☐ Reference #1 Date Received: ______________

Name:

Contact Date Notes

If not received,

☐ Status update email sent___________

☐ New reference provided (see back)

☐ Reference #2 Date Received: ______________

☐Waived/exempt

Name:

Contact Date Notes

If not received,

☐ Applicant status email sent_________

☐ New reference provided (see back) ☐Archive

☐ Interview Contact Date Notes

Date Completed:

☐in-person

☐phone

☐online

☐ Confirmation email sent_____

☐ Prospective status assigned ☐Archive

STATUS: PROSPECTIVE VOLUNTEER

☐ Orientation Contact Date Notes

Date Completed:

☐in-person

☐remote

☐ Volunteer handbook provided_______

☐ Volunteer status assigned

☐Background check recv'd____ ☐Archive

STATUS: VOLUNTEER

☐ Placement / Service Area____

☐ Training Contact Date Notes

Date Completed:

Applicant Volunteer

An Applicant is a potential volunteer who has submitted their completed application. An application is considered complete if all information, including two references, have been supplied. An application for a youth volunteer is not considered complete until the Parent Consent form has been received.

When an application is received, the information is then entered into the volunteer management software. The application information along with relevant information from the onboarding tracker is entered into the new volunteer profile in the electronic database.

A copy of the completed application is downloaded and saved for file reference backup.

Once an application is received, two sub-processes begin. The reference check and interview process occur independent of each other as part of the intake process with each having its own set of steps.

Reference Check (Sub-Process)

See REFERENCE CHECK section for further process details.

All applicants are required to furnish the name and contact information of two references as part of the intake process. References are retrieved via form submission initiated by organizational staff.

The organization may choose to waive one or both of the references. References that are waived are noted as such in the volunteer record.

While waiving references is permissible, it is only advisable in cases such as the following:

- Volunteer works off-site or remotely
- Volunteer is referred from a board member
- Volunteer is familiar to and known by the organization

If a reference is unable to make timely submission of the form, a representative of ***[NONPROFIT ORGANIZATION]*** may either call the reference directly and complete the form with the reference over the phone or the applicant may furnish a new reference.

A potential volunteer who is unable or unwilling to furnish two references will not advance in the process. Their application is considered incomplete.

Note: The background check process is not part of the initial reference screen required of applicants. For positions where a background check is required, further intake details will be provided as part of the placement specific training.

Interview Process (Sub-Process)

See INTERVIEWS section for further process details

All applicants participate in a minimum of one interview with an ***[NONPROFIT ORGANIZATION]*** representative. Interviews may be face-to-face, electronically mediated (e.g., Zoom), or conducted over the phone.

Organizational representatives conducting interviews should do so in a consistent, balanced, and fair manner. Interview questions and interview scoring have been provided in this manual for use in the intake process. Using standardized tools will ensure a balanced approach to interviewing.

Through the process of interviews and reference checks, the initial fit of the applicant to the volunteer program is assessed. If the applicant is determined to not be a good fit, a declination letter is mailed.

Accepted applicants convert to Prospective Volunteers and the orientation and training phases of onboarding are initiated.

Prospective Volunteers

Prospective volunteers are those who have completed initial and have been accepted into the volunteer program. Prospective volunteers are the last stage in the intake process prior to becoming an active volunteer. Prospective volunteers are those ready to orient and train. Prospective volunteers may know exactly which volunteer role they are being assigned or they may wait until after orientation to decide.

Prospective volunteers attend orientation and engage in training. Orientation is both the final step in the intake process and the first big step of the onboarding process. As the final step in the intake process, Orientation ensures that every volunteer has a clear understanding of the mission and purpose of the organization, the expectations of their volunteer service, the general role and responsibilities of volunteers, and the applicable policies and procedures to which they agree to comply.

Orientations should be scheduled with a frequency relative to the rate of applicants in process. Orientations should follow a consistent format and content to ensure that each volunteer has been given the same information.

Orientation can also be an opportunity to continue to assess fit for placement as well as to build a community. As such, it should be held in-person whenever possible to allow for further screening observation and to provide opportunity for team and relationship building. If necessary, a recorded version of orientation will be made available for those Prospective Volunteers unable to meet in-person for valid logistical reasons. See Orientation section for more information.

Training begins once orientation is complete. Training is role dependent and may include classroom education, handouts, online modules, and job shadowing activities as is relevant and deemed necessary by the organization for the effective and successful execution of the assigned tasks. Training may also include additional intake requirements (e.g., background clearance, driver's insurance). Training is part of the onboarding process to integrate new members of the organization; it is also the final and extended phase of intake in assessing fitness of job placement. See Training section for more information.

Active Volunteers

Active Volunteers are "Volunteers" and are those who have successfully completed all steps in the intake process including orientation. In most circumstances a volunteer will progress from Potential to Active in a somewhat sequential manner. However, due to timing in available orientations and scheduling needs, there may be times when the order or training and orientation are reversed.
In some circumstances, a volunteer may be designated Active prior to attending orientation. In those instances, placement-specific training will occur prior to orientation.

Once a volunteer has completed all the steps in the Intake Process, regardless of order or completion, the Intake Process is complete. While intake is complete, the volunteer will continue to onboard for several more months or longer as they integrate into the organization and the community of volunteers.

When a volunteer is designated Active, they receive:

- Welcome letter
- Online scheduling portal access
- Name badge / uniform
- Background check
- Assigned shifts

Youth Volunteer Intake

[Nonprofit Organization] will accept school-age youth volunteers between the ages of 14 to17 years and attending high school. Youth volunteers submit a different application form but do complete the same process as the general volunteer. The youth volunteer application asks additional questions of the student (e.g., parent/guardian name) not found on the adult application.

Youth volunteers are also asked to furnish parental consents for general program involvement as well as medical treatment. All minors registered as volunteers must have current contact information for their parent/guardian on file with the organization.

[Nonprofit Organization] does not provide independent volunteer opportunities for minors under the age of 14 or not yet attending high school.

Accompanied Minor Volunteer

Minors under the age of 14 and/or not yet attending high school may volunteer if accompanied by a parent/guardian volunteer. The pair volunteer together and are registered as a Group Volunteer.

Both the parent/guardian and the minor complete the respective adult and child applications.

Episodic Volunteers

Episodic volunteers are those who volunteer for a single episode, or event. Episodic volunteers may participate in a one-day organizational event or provide support for one non-recurring project with a defined beginning and end. Special events and short-term committee assignments are examples of episodic activities.

Episodic volunteers are still registered formally with the organization prior to commencing service work, even if that registration occurs immediately before. Episodic volunteers complete a modified intake process relative to their service area.

Episodic volunteers submit a modified application that will be made available for the purpose of capturing contact, hours, and service provided. In general, episodic volunteers will not need to furnish references nor complete formal orientation. However, all steps in the process, if deemed necessary, will be completed as prescribed.

Training for episodic volunteer assignments is episode specific and generally provided at the point of service.

Group Volunteers

Group volunteers are two or more people who volunteer together as a corporate entity. This designation most commonly refers to the involvement of civic groups, organizations, or businesses who volunteer as a collective entity.

Accompanied minor youth and their parent/guardian are also designated as Group Volunteers.

A single application is sufficient for a group application. The primary group liaison or leader that is expected to remain the point of contact between the organization and the group, will complete the general volunteer intake process. A memorandum of understanding will be put in place with the group detailing the other steps of the intake process that will be required for individual participants and taking into account considerations such as the age of participants.

REFERENCES

Reference checks are a sub-process to the general volunteer intake process. The purpose of the reference check is to assist in the assessment of the applicant for fitness of placement.

The reference check process is initiated once the competed application is received. The Google Form is sent to each of the Applicant's listed references at the email provided.

Reference Information

All potential volunteers are required to provide the name and contact information for at least two (2) character references as part of the application process. The following guidelines are provided to applicants to help them determine who to use as a reference.

The furnished references should be someone familiar with the personal and/or professional characteristics of the applicant. References cannot be from a relative, family member, roommate, or someone residing at the applicant's residence.

References do not need to be local. You are seeking two people who can attest to the general trustworthiness and character of the applicant.

- Suitable references furnished by an applicant include:
- Family friends
- Neighbors
- Members of church
- Leaders of an organized social group or club
- A former or present teacher
- An employer, past or present
- Co-workers
- Previous volunteer coordinator/supervisor

It is important that the contact information provided for each reference is complete and accurate.

The ***[Nonprofit Organization]*** will send each of the references a short reference check form to complete. These form responses help the organization to get to know the volunteer applicant better.

Reference Format

References may be received digitally, hard copy, or over the phone. The name, relationship, and date of verification of the references are entered into volunteer's database record. If a reference is waived, that is noted as well.

Reference Collection

All complete applications provide the names and contact information of two references.
Reference forms are sent out by an organizational representative to retrieve two completed reference submissions.

- The electronic online form can be used to collect reference information from reference via email.
- A hard copy form is available for references that are unwilling or unable to submit their reference online.

This section contains links to both the online and hardcopy forms. Additionally, onboarding communication email templates have been provided as examples for each point of contact.

Reference check acquisition has the potential to stall the progress of the intake process. References may be unwilling, unable, or unavailable to respond to and complete the reference request.

Reference Collection Timeline

The timeline for reference checks is dictated by the timely reply to the reference request from the listed reference. If responsive, the timeline should be no longer than 7-10 days from the date of the request to the date of verification. If unresponsive, the intake timeline lengthens.

The initial reference request is made with a seven-day reply ask. If, after this timeframe, no reference has been received, a second email should be sent to the reference requesting their response.

If, after the second attempt the reference does not respond, the applicant should be contacted. At this time, they can choose to supply another reference or they can be encouraged to reach out to the unresponsive listed reference. If the applicant chooses to supply a new reference, that information is documented in the volunteer's record.

Another option to gain a response from a listed reference is to call the reference directly. Applications contain both email and phone contact information for listed references. A reference form may be completed over the phone.

Reference name, relationship, and date of verification are documented in the volunteer record. Reference forms are downloaded and saved for file reference backup.

After receiving the reference forms back, they are to be filed with the applicant's other materials. Received reference requests should be linked to the application and made available to an interviewer for review.

FORM LINK**: VOLUNTEER REFERENCE FORM - ONLINE**

FORM LINK**: VOLUNTEER REFERENCE FORM - HARD COPY**

INTERVIEWS

Interviews are a sub-process to the general volunteer intake process. The purpose of the interview is to assist in the clarification of expectations and determination of fitness for placement

Once an application has been accepted, the interview process is initiated simultaneously alongside the reference check process.

Interview Format

Interviews can be face-to-face, technologically mediated (e.g., Zoom), or over the phone. Interviews may be completed as part of a group setting or individually.

Interviews may be as formal or informal a setting as is appropriate. No matter the nature or context of the interview format, the questions and scoring should remain consistent for all volunteer candidates.

At the discretion of the organization, some placements may require additional interviews. Interviews are generally scheduled for one hour. Group interviews may take up to two hours but can be a more efficient use of administrative time.

Any organizational representative responsible for conducting interviews should be familiar with the types of questions that are legally allowed to be asked in an interview. An interview script has been provided.

Interview Questions and Scoring

Using pre-scripted interview questions and an objective scoring system helps to ensure a fair and balanced approach to interviewing volunteers.

The Volunteer Interview Guide and Volunteer Interview Scoring sheets linked here and shown below can be used to conduct and document the interview results. The guide is meant to provide a consistent framework to guide the interview with the applicant. The scoring sheet is separate from the guide and can be used to record interview impressions.

The interview and scoring frameworks provide the organization with the tools to have a variety of interviewers who will maintain the consistency of questions and scoring.

Please refer to the following two documents to conduct an interview with the applicant.

Interview Forms

Current forms can be found on the Google drive in the intake folder.

FORM LINK: VOLUNTEER INTERVIEW GUIDE - QUESTIONS

FORM LINK: VOLUNTEER INTERVIEW GUIDE - SCORING

Example

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VOLUNTEER INTERVIEW GUIDE

Applicant Name ____ **Date**________________

Interviewer Name_______________________________________

Note to Interviewer: . Interviews are best held face-to-face, but phone interviews are also acceptable. Review the completed Volunteer Application and Reference Forms prior to the interview.

At the beginning of the interview,

- explain to the applicant that you will be taking notes
- ask about anything missing or unclear
- chat about any interesting information in the application to build rapport

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Questions:

1. Tell me about yourself (hobbies, interests, past/present career, current studies, etc)
   a. What brings you joy?

2. How did you come to be interested in helping the Honeybee Discovery Center?
   a. Why is our cause important to you?

3. What other experience have you had with volunteering?
   a. What is a good experience you've had with volunteering?
   b. What is a challenging experience you've had with volunteering?

4. What makes you feel appreciated in the workplace and when you volunteer?
   a. What drives you crazy?

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VOLUNTEER INTERVIEW GUIDE

Applicant Name ____ **Date**________________

Interviewer Name_______________________________________

Note to Interviewer: After closing your interview with the applicant, complete the following assessment. Under each heading provide a numerical rating and write a specific service related comment in the space provided. The numerical rating system is based on the following.

1 - Unsatisfactory 2-Satisfactory 3 - Average 4 - Above Average 5- Exceptional

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Verbal Communication

How were the candidate's communication skills during the interview?

Rating: 1 2 3 4 5

Comments:

Applicant Enthusiasm

How much interest did the candidate show in the service area position and the organization?

Rating: 1 2 3 4 5

Comments:

Interview Recommendation

The interview results in the recommendation to accept or decline the applicant for service. While most applicants will likely be a good fit, there are several reasons why a candidate may be declined including their availability, expectations, and behavioral fit for the job.

If the applicant is determined to not be a good fit, a declination letter is mailed. The letter should thank the applicant for their time and direct them to other community volunteering opportunities.

Applicants who are recommended for service following their interview are designated as Prospective Volunteers. Prospective volunteers have completed all organizational steps in the intake process thus far and are ready to attend orientation, the final step in the volunteer intake process.

ORIENTATION

At the intersection of both recruitment and training operations is the Volunteer Orientation event. Ensure that your recruitment efforts do not go to waste by having a thoughtful way to integrate your new volunteers into the organization. This is an opportunity to bring together motivated community members and get them excited.

Orientation Overview

Once volunteers are recruited and have completed intake, it is important to orient them to the organization. You will want to share information on the mission, the program, expectations for volunteer service, and everything else that will help a volunteer be informed. It is also a time to focus on the onboarding activity on integrating volunteers into the community of your organization at a relational level. Orientation provides many benefits to both the volunteer and the organization in preparing volunteers for service and engaging their interest. Orientations provide information, clarify expectations, and provide a means for volunteers to connect.

Orientation provides volunteers with the information and knowledge they need to effectively represent the organization such as its mission, vision, history, and general activities. Orientation also provides a mechanism to manage volunteer expectations through discussion of service areas, training, and scheduling commitments. Finally, orientation provides an opportunity to engage volunteers and thank them for their willingness to help.

In general, an effective orientation will serve to welcome new volunteers, familiarize volunteers with the organization, outline role expectations, responsibilities, and tasks, and build a community.

Orientation Content

Orientation should be required of all volunteers. All volunteers should be expected to have a common knowledge concerning the history and mission of the organization, key service overviews, and a general understanding of the expectations, policies and procedures that govern volunteer work at the organization. It is also a time to build community as well as share the expectations of service. As an operational training activity, it is an opportunity to begin training, which leads to consistency in operations.

Orientation should cover all the items in the Volunteer Handbook as the basic core content framework. The Volunteer Handbook can also be used for remote volunteers in orienting online. It can even be mailed. Using the Volunteer Handbook as the orientation framework will help to establish consistency regardless of the format.

Updates to the Volunteer Handbook can be addressed by disseminating the information at a future volunteer in-service.

Orientation as Onboarding

Volunteer satisfaction increases with a thoughtful, organized volunteer orientation. A well-planned volunteer orientation can serve to create a foundation for sincere volunteer engagement. Consider the following needs of volunteers when planning Orientation content. The orientation content will serve to establish expectations in scheduling, role, and policies. In so doing, create an environment that instills:

- **Confident Readiness**: Even volunteers get first day on the job jitters. By increasing knowledge and having your volunteers create a community, you boost their confidence. Volunteers want to do a good job.
- **Belonging**: Volunteers want to be a part of something bigger than themselves. That's why they signed up to help. Orientation is the perfect opportunity to connect your volunteers with a bigger vision and mission
- **Participation Efficacy:** Get volunteers energized about the contribution they are making to the mission they serve. Connect the dots and show your volunteers the impact of their time and effort in helping the organization meet its mission.

You can decrease the risk of future problems with volunteers by clarifying expectations for service. Orientation is a time to establish expectations for behavior and set clear guidelines that can be established at the start. It is also a great opportunity to help volunteers establish relational connections with one another as well as with members of the organization.

Orientation as Relationship Building

There are a additional benefits to hosting regular Orientations beyond those to the volunteer and directly to their administration in the organization. Orientation is a mini-event that can be used to build the program within the community.

Community Outreach. Volunteers represent the organization to the public and to their own private circles of influence. The more informed they are about ***[Nonprofit Organization]*** operations and mission, the more they can advance the public relations, recruitment, and marketing efforts by extension.

Retention. Develop a sense of enthusiasm in volunteers, it will help keep them motivated. Orientation is part of the onboarding process to integrate volunteers into the organizational culture. Reaffirm their decision to volunteer by running an engaging and meaningful orientation as the final part of their onboarding.

Ideally, volunteers will attend orientation prior to placement specific training. The general volunteer orientation is the first part of training for all volunteers. Volunteers build a cohort as an onboarding group that is helpful for their continued learning and engagement.

Orientation Planning

There are a variety of ways to deliver volunteer orientation. Face-to-face, recording, and synchronous online are all options for volunteers, with the preference being a face-to-face group orientation for those volunteers who will be regularly representing the organization and each other.

For remote volunteers and those whose service is temporary, orientation can be delivered in a modified form such as online or on paper or abbreviated. For special events, the training is often onsite and specific to the task for volunteers whose service is temporary to that event. You may want to provide a paper orientation to all volunteers ahead of time, even one-day special event volunteers, to ensure that they can effectively represent your organization to the public.

Volunteer orientation should be scheduled during a day/time that reflects your volunteer scheduled needs. If you want volunteers for mid-weekday hour field trip support, having an orientation during that time will help you determine availability needs Volunteers unable to make an orientation at that time would not be a good fit for the role. Likewise, if you want volunteers on the weekends, consider having your orientation on a weekend.

Orientation content is generally informative in nature and the tone should remain upbeat and inviting. Orientation can be led by the Project Manager, an executive board member, and may be supported by experienced volunteers. Consider icebreakers or other games, "guest" speakers to assist with content, and snacks and refreshments appropriate to the time of day. Allow ample time for side conversations and relationship building and don't rush the content. A 90-minute to 2-hour time frame will give you plenty of time to inform, inspire, and integrate your volunteers. Consider starting with a welcoming meet and greet for the first half hour open to the public with a general overview of the information provided. See more about Meet and Greets in Recruitment.

It is a good idea to have several volunteer orientations scheduled at the same time, but to publicize just one. You can invite community members to join the orientation as a hosted recruitment event.

By doing so, you can encourage your new onboarding volunteers to have a friend join them. Having one or two more additional dates and times already planned as alternative dates will allow you to plug volunteers into those who can't make the advertised event. This will help ensure there is a day/time that works for more people.

Orientation Action Plan and Timeline

WHEN	VOLUNTEERS	
2-4 Weeks Before Event	Send an orientation invitation to all prospective, applicant, and potential volunteers. Prepare leadership (board, advisory board) with dates and encourage them to invite someone. Communicate any need attendance or role they may have.	
1 Week Before	Call those who have not to confirm attendance or reschedule them to another date Gather day-of materials	
2 Days Before	Send confirmation email to registered attendees. Include the following: Volunteer Orientation Manual Volunteer Orientation Agenda - abbreviated Date, time, and location details or orientation List of anything they should bring or be ready for (e.g., photo, ID, etc.) List of what you will provide (refreshment, nametags) Day-of contact information	
Day of Orientation	Set up space with tables, chairs, and monitor.	

	Set up any refreshment and guide volunteers to it as they arrive Greet volunteers Oversee sign-in Handout orientation materials Facilitate orientation *see agenda detail below Collect paperwork at end
2 Days After	Send thank you follow up to all attendees Send orientation evaluation survey
1 Week After	Continue follow up Schedule training for new volunteers

Orientation Supplies

Paperwork and administrative supplies:

Handbooks

Agreement w/ ***[NONPROFIT ORGANIZATION]***

Getting to know you forms

Nametags

Camera for name badge photos and ID

Sign in sheet and pen

Uniform sample

Orientation slide deck

Food and Beverage Supplies

Hot water, coffee

Sugar/creamers/stirrers

Cups

Plates/napkins

Individually wrapped snack/dessert items

Event Location Supplies

Tables/ chairs

Tablecloths

Monitor/projector

Promo gift/ door prize giveaway

Orientation Agenda

2:00-2:30 Meet & Greet Information Session

2:00 Welcome/History

Housekeeping (restroom, refreshment, temperature)

Introduce staff/board members

- About Us – brief overview of the organization's purpose
- History – brief background of its founding/founder
- Mission/Values – share organizational culture

2:15 Program Overview

- How to Bee-come Volunteer
- Collections & Exhibits
- Education
- Gallery & Gift
- Special Events
- Facility & Office Support

2:30-2:40 Break - Thank and excuse those who are not interested at present time

2:40-3:30 Orientation

2:40 Icebreaker

Facilitate a getting-to-know your community builder icebreaker

2:50 Volunteer service guidelines

- Code of conduct
- Customer Service
- Safety
- Appearance
- Schedule & Time Reporting

3:10 Wrap Up Activities

Paperwork/Photo -turn in paperwork, get name badge photo

Exhibit Exercise – self-paced interactive exhibit exercise for general review

3:25 Next Steps

Reiteration of how important volunteers are

Thank them for attending

Q&A

- Bee Ready!

3:30 Adjourn

Orientation Evaluation

After orientation, it is important to follow up with all attendees to get feedback on the content, organization, and usefulness of the orientation. As the volunteer program grows, this co-design approach to the orientation will ensure content that reflects the expressed needs of volunteers.

What did you find most valuable about your volunteer orientation?

What questions do you still have?

What do you wish you learned more about during your volunteer orientation?

What would you change about–or add to–your orientation experience?

Adjust orientation content in response to survey questions to meet the needs of your volunteers.

PROGRAM AREAS

The ***[Nonprofit Organization]*** Volunteer program is comprised of different program areas that are differentiated by primary activity, location, and/or schedule. Program area differentiation helps provide a more suitable fit for a volunteer's abilities, personality, and availability.

Each of the volunteer program areas provides support for the operations and activities of the organization. Activities of volunteers are essential for the fulfillment of the mission and for the development of the center.

While all volunteers are provided with the same, or similar, intake and onboarding. Each program area has training and placement protocols unique to the volunteers performing those position responsibilities.

Service Descriptions

Service descriptions make up the backbone of the program area. From the service description comes the training and operational support materials that follow. While most service descriptions are formal in nature, service descriptions are also applied less formally in special events and episodic contexts. In those instances, the service description might be a brief paragraph highlighting the key functions of the role and providing contact information for questions.

Volunteer service descriptions are required to be provided to each incoming volunteer and should be discussed during interview and orientation. Service descriptions clarify expectations of the role. All service descriptions include information regarding:

- Name of the volunteer reports for supervision
- Essential duties and responsibilities to be performed.
- Knowledge, skills, and abilities necessary for the role
- Training requirements
- How the volunteer will be evaluated
- Time commitment

Volunteer opportunities at the ***[Nonprofit Organization]*** fall into the following program service areas.

[Insert Organizational Position Descriptions]

TRAINING AND EDUCATION

After a volunteer has successfully onboarded, the training activities begin. Skills-based volunteer training provides the foundation to establish volunteers who can perform all the required tasks of a placement independently.

Skills-based volunteer placement is integral to maintaining operational support for a healthy volunteer program. If a volunteer is unable to perform a job as required, a volunteer should not be assigned that role as a placement. Rather, a placement with a better fit should be offered to the volunteer if available.

Training Competency

Training for each placement should include a competency checklist that will become part of the volunteer record. The training checklists are developed from the service description and indicate whether the volunteer can and does meet the minimum requirements to perform the role independently. The competency checklist further breakdown down job duties into observable tasks that demonstrate ability. Using the competency training checklist with each volunteer assigned to the same role will ensure consistency in content and expectations.

If a volunteer is unable to perform the job satisfactorily, the volunteer should not be assigned the role, irrespective of their desire to do so. An eager volunteer who is unable to demonstrate competency in a role should be guided to select another role which will better serve the needs of the organization and their abilities.

The checklist receives the signature of the organizational representative attesting to the volunteer's ability to serve and is added to the volunteer record for documentation.

Training Materials

Each program area has a guidebook or reference work providing an overview of the essential expectations of the role. It provides an overview for the volunteer that can be developed further in job shadow or other training.

Tip sheets, reference guides, and other job aides developed for the position should also be distributed to the volunteers during training.

Training Format

Training is placement dependent and may involve checklists, job shadowing, video, and/or educational modules. Each program area has training that is specifically relevant to the job duties outlined in the service description.

Training can take place in classroom settings such as in-services or can be facilitated during active real time such as a job shadow. Training also includes written program guides and other materials as developed for program volunteer instruction.

FORM LINK: ORIENTATION & TRAINING FOLDER

IMPACT ASSESSMENT

The impact of the volunteer contribution should be assessed on a recurring basis to ensure that the needs of the organization as well as those of the volunteers are being mutually and consistently met.

Volunteer Performance

At regular intervals, volunteers should be evaluated for appropriateness of continued fit in the placement. Volunteers will be assessed for task-based competencies determining physical, cognitive, and emotional fit as well as for behavioral competencies to determine alignment with organizational values such as customer service.

Evaluation should be conducted shortly after onboarding and then at regular intervals thereafter. Performance appraisals can be completed by an organizational representative familiar with the work of the volunteer. Self-appraisals are also an option for volunteers, but have the drawback of no direct staff feedback.

Whatever the process and timing selected for evaluation, it is important that it be consistent.

Volunteer Satisfaction

In order to ensure that volunteer program is engaging volunteers, it is also important to measure their satisfaction with the experience of being a volunteer. From informal pulse checks to formal annual surveys, there are a variety of options available.

ROUTINE OPERATIONS

Ongoing communication for intake, onboarding, scheduling, coordinating, recognizing, and managing volunteers is the core activity of daily routine operations.

Scheduling, hours tracking, and routine communication are covered in this next section.

Self-Scheduling and Calendaring

Depending on the placement, the volunteer may have regularly recurring or one-time schedules. Self-scheduling will be provided, when possible, to allow volunteers to self-select shifts for which they are available.

Volunteers may self-schedule up to 48 hours prior to the shift start. Within 48 hours, a volunteer may sign up for a shift by contacting the Project Manager or designee, who can add them to the schedule.

Cancellations of scheduled shifts should occur no less than five days prior to the start of the event/activity. Shift cancellations under five days are communicated directly to the Project Manager.

Every effort should be made to create recurring schedules to the extent that the volunteers can and are able to do so. Having recurring schedules for volunteers will help to find volunteers to fill the shift days/times when volunteers are not currently available.

Volunteer Management Software

The VMS is the database software and scheduling system for the volunteer program.

Hours and Service Tracking

Volunteer hours are collected at each event and activity for which they provide service. A sign-in sheet, calendar, or similar should be available to document both time in and time out. Hours are rounded to the .5-hour.

Volunteer hours for groups are tracked corporately. A sign-up sheet will be provided for all group members to sign the document participation and times in and out. The collective hours will be credited to the record of the group leader.

Volunteer Communication & Database Management

All communication with volunteers is tracked. From intake and onboarding with checklists and requirements to complete, to schedule requests, to thank you cards sent, the volunteer file contains a record of all of it.

Volunteer communication and database management is constantly occurring. While some of the communication is specific to an event or singular occurrence, the majority of the communication is routine in nature.

Intake communication to the applicant as well as the references they furnished is cyclical. A template of those messages has been created as a reference and shortcut.

Conclusion

A well developed and thoughtfully designed volunteer program will provide an organization with plentiful organizational capacity to meet their goals and objectives.

This manual has been created to provide guidance, information, and process for the variety of activities associated with operating a volunteer program. While not exhaustive, it has also provided a context for volunteer engagement and the profession of volunteer administration as it relates to each area of the manual.

A volunteer program can be an incredible resource to an organization, or it can be a drain on resources, the difference is in the structure, or lack thereof, its development. This manual is intended to be a guide for the inaugural launch of the ***[Nonprofit Organization]*** volunteer program.