

# 12 STEPS to Recruiting & Onboarding a Volunteer

Bringing on a new volunteer doesn't have to be complicated or overwhelming, but there are important things to consider to make sure both your organisation and the volunteer are protected and on the same page.

If you've not recruited volunteers before or you're looking for simple step-by-step guidance on how to do things properly, this comprehensive guide will walk you through the 12 steps to recruiting and

onboarding a volunteer and link you to other Free, useful templates and resources available through The Centre for Volunteering.

This document breaks down the recruiting and onboarding volunteer process into 12 easy-to-follow steps. Use this guide below as a quick refresher whenever you're recruiting and read on for all the ins and outs of how to complete each step.

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# Getting ready to recruit



Save yourself a lot of time and future challenges by preparing thoroughly before recruiting a volunteer. These steps will ensure you have strong volunteering governance and you will find the exact right person for your volunteering role.

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## WRITE A VOLUNTEER MANAGEMENT POLICY

# 1/12

Essentially, a volunteer management policy is a very valuable document for any Volunteering Involved Organisation to have in your governance arsenal. Essentially it is a document that outlines why and how volunteers will be involved in your organisation, and outlines any policies and procedures that relate to your volunteer workforce.

What you include in your volunteering policies will be unique to each organisation. It should include the information volunteers need to know about the expectations the organisation has for your volunteers and any legal, insurance and compliance requirements.

You may want to use the National Standards for Volunteer Involvement as a guide.

Try to keep your policy simple and easy to read – assume not all readers have English.

You will need a volunteer management policy in place before you start recruiting.

### BONUS

To make things easier for you, we have a **Volunteer Management Policy Template** you can download now for free to get you started.

[FREE TEMPLATE: DOWNLOAD NOW](#)

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## CREATE A VOLUNTEER AGREEMENT

# 2/12

It is good best practice to have your volunteers sign a Volunteer Agreement before they commence work. It helps keep them and you safe and ensure everyone understands what is expected of them.

A typical volunteer agreement may range from a simple form to something more complex depending on your organisation size. This may include:

- Definition of what it means to be a volunteer
- What the organisation's expectations of the volunteer area
- The volunteer's duties or obligations
- A description of the volunteer role they are undertaking
- Health, safety, insurance and legal obligations

- Communication channels within the organisation
- Induction and training requirements
- Important policies such as reimbursement of expenses
- Intellectual property clause

### BONUS

To make things easier for you, we have a **Volunteer Agreement Template** you can download now for free to get you started.

[FREE TEMPLATE: DOWNLOAD NOW](#)

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## WRITE A VOLUNTEER POSITION DESCRIPTION

3/12

Before you start recruiting, it is great best practice to write a volunteer position description. A position description should be similar to what you create for an employee of your organisation, but tailored to the needs of a volunteer.

Not sure how to start?

### BONUS

Take our free class on **Writing an Effective Volunteer Position Description** now.

**FREE ONLINE CLASS: WATCH NOW**

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## OBTAIN APPROPRIATE INSURANCE

4/12

When bringing on volunteers, it is important to think of any insurance requirements your organisation might have.

When ensuring insurance needs, it is always recommended that you seek professional advice to determine the type of cover you require.

It is also important to review your policies regularly and inform your insurance broker of any new or unusual activities your organisation or your volunteers are participating in to ensure appropriate insurance coverage. Examples of such variations include, but are not limited to, volunteers working:

- In a different location
- In a new role
- From home or a remote location
- With different equipment
- With a different client group
- In a new program area
- In large numbers – such as a big event

If your insurance policy has age limitations, you should also contact your insurance broker if you wish to engage volunteers under the minimum stated age, or if volunteers reach your maximum age and you wish for them to continue volunteering with your organisation.

In the event of an insurable incident, you should also inform your insurance provider as soon as possible.

You may need to consider these key types of insurance:

- Volunteer Workers Personal Accident Insurance
- Public Liability Insurance
- Directors & Officers Liability Insurance
- Professional Indemnity Insurance
- Motor Vehicle Comprehensive Insurance
- Property & Contents Insurance

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# Finding your volunteer



It is time to find the right volunteer for your organisation and the position you have available. These steps will help you walk through the recruitment process to find the best possible person for the position and avoid any potential issues.

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## ADVERTISING THE POSITION

# 5/12

Without advertising, your volunteer positions is a critical process in the recruitment of volunteers. Without advertising you could be limiting your pool of potential volunteers and missing out on a wide variety of skills and knowledge that you may not be able to tap into through your immediate networks.

### What is the role you are advertising?

Consider the role you are advertising for and construct your job ad:

- Keeping the message simple
- Presenting accurate information
- Providing professional, well-presented material

### Where are you likely to find appropriate volunteers?

Some locations for finding volunteers include:

- Family/friends of current volunteers
- Schools and tertiary institutions
- Corporate volunteers
- Grey Nomads
- Senior Citizen clubs
- Multicultural organisations
- Community Centres
- Places of employment
- Places of worship
- Partnering through corporate volunteering

You may also consider using a Volunteer Referral Service through your State's peak body or local Volunteer Resource Centre.

### How will you advertise the role?

Consider the most appropriate method of advertising based on the volunteers you are trying to engage, i.e. age, skills, location.

Some advertising methods to consider include:

- Word-of-Mouth
- Media/online
- Local free press
- Newsletters - schools, local employers, other interest groups
- Letterbox drops
- Community notice boards
- Flyer/posters
- Open days
- Fetes/festivals/shows
- Talks at local organisations
- Stalls at community events
- Internet and social media
- Phone
- Volunteer Recruitment sites

Remember, a combination of methods will be most effective.

Regardless of the method(s) of advertising you choose, you will want to keep the message simple, clear and informative, and targeted to the type of potential volunteers you wish to attract.

You should also promote if you are an inclusive organisation to attract potential volunteers that may normally opt out from answering potential roles.

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## PREPARING FOR INTERVIEWS

6/12

The interview process will help to identify if the applicant will be the appropriate person for the role. A great volunteer can enhance a volunteer program and support staff in delivering a service. An unsuitable volunteer can be time-consuming for the volunteer manager/coordinator, and can damage the program and potentially the reputation of the organisation.

Steps to prepare:

- **Book** a time with the candidate and a quiet location to conduct the interview
- **Understand** the role and the skills and attributes to be successful in the role
- **Prepare** a set of questions that will provide you with the information required to make a well-informed decision about the suitability of the candidate for the role

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## CONDUCT A VOLUNTEER INTERVIEW

7/12

Interviews can be formal or informal in nature. This will often be dictated by the level of responsibility the role will carry.

Even if informal, the interview process indicates to a prospective volunteer that their role within the organisation is viewed seriously.

Steps you can use:

- **Provide** the candidate with an overview of the role, the statement of duties and any potential challenges in the role

- **Ask** the candidate your prepared questions and take notes to help you remember their responses
- **Advise** the candidate of any requirements for reference checks
- **Inform** the candidate of the requirement for a Police Check or Working With Children check if required
- **Answer** any questions the candidate may have and advise next steps

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## SELECT A CANDIDATE

8/12

Once you've conducted your interviews, it is time to select the candidate to take on your volunteering position. These steps may be useful in helping you make the decision:

- **Review** the notes you have taken from all interviews
- **Remove** those candidates that do not meet the selection criteria, role requirements or do not feel like a suitable fit with the organisation
- **Decide** on the most suitable candidate, taking into consideration:
  - Enthusiasm for the role and organisation
  - Willingness to learn
  - Appropriate skills, knowledge and interests

- Initiative and self-motivation
- Reliability and dependability
- Openness
- Flexibility
- Ability to work with others and in a team
- Ability to listen and take direction
- Willingness to obtain required checks
- Availability and willingness to meet the required hours/times/days, trial period and conditions
- **Conduct** reference checks for preferred candidates
- **Notify** successful and unsuccessful candidates of the outcome

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# Bringing on your volunteer



Now that you've notified your volunteer they have been successful, you're ready to start the onboarding process to welcome your new volunteer and get them equipped and ready to take on the role. Below will walk you through the steps and different approaches to onboarding a brand-new volunteer.

Onboarding is the process of integrating a new staff member into an organisation. A robust onboarding program will consist of any pre-boarding activities, the induction and any additional essential and ongoing training required for the role.

Structured onboarding programs should be provided for all staff, including volunteers, to ensure they can become independent, productive and confident team members.

Without a clear and structured process, your volunteers, like staff, may never integrate properly into the team and can feel unprepared and ineffective.

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## CONDUCTING PRE-HIRE CHECKS

# 9/12

It is common for volunteers to be required to go through screening processes, such as a backgrounds checks, in order to check their suitability for different roles.

This step is particularly important when volunteers are required to work with vulnerable populations such as the elderly. It may also be required where volunteers are responsible for financial or driving duties.

You may need to consider one or all of these checks before appointing your volunteer:

- Working With Vulnerable People Check
- Working With Children Check
- National Police Check

**Starting a new role can be an overwhelming experience for anybody, let alone someone living with disability or who is on a mental health recovery journey. Whilst it is understandable that all volunteers are inducted and onboarded to meet organisational requirements, are you able to offer a degree of flexibility which can take into account personal factors (e.g., sight or hearing impairment, a limited capacity to process information, a physical incapacity to attend a meeting at a particular location)?**

**To make the onboarding and induction process more inclusive, consider implementing the approaches on the next page.**

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## MEET AND GREETINGS

# 10/12

Consider bringing your volunteer into the organisation to get to know the team and space ahead of their first shift. Meet and Greets are often a better option than a traditional induction, and provide an opportunity for the potential volunteer to visit the organisation, meet the team they might be working with and be given a description of the role and duties involved.

This reduces any stress associated with the unknown and helps build a sense of inclusion. It is ideal to plan for this to occur without any pressure of volunteering.

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## TRIAL SHIFT

# 11/12

Consider having your volunteer join you for a shorter trial shift, perhaps to shadow another volunteer, before they take their first longer volunteer shift with your organisation. The trial shift allows extra confidence for the potential volunteer, and also a chance to look at the induction paperwork!

The trial also allows for the induction to be less intensive by breaking it over multiple shifts.

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## FORMAL INDUCTION

# 12/12

The formal induction happens after the volunteer has committed to the role and is already feeling a part of the team.

A few key things to consider:

- Ensure staff know when the volunteer is starting with the organisation.
- Ensure their workspace is prepared for when they arrive.
- Plan to make sure the new volunteer's key supervisor is available for their first few shifts.
- Touch base with the new volunteer at the end of each shift, particularly for the first month.

### BONUS

To make things easier for you, we have a **Volunteer Induction Checklist** you can download now for free to get you started.

**FREE CHECKLIST: DOWNLOAD NOW**

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