

Serious Tips for Volunteer Onboarding



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Other tips in this series:

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“Onboarding” is the process of making a newly accepted volunteer into a functioning member of your team. It includes the tasks of completing enrollment procedures and paperwork, orienting the new volunteer to their role, and training the new volunteer. The onboarding procedure can sometimes take several months to accomplish and can be complicated in systems such as SHIP and SMP where the volunteers don’t work in a central office. Here are some tips to help with creating a successful onboarding experience:

1. Onboarding should always be thought of as a process, not an event. You may have several “events” that take place during it, but viewing it as a continuum will enable you to see it better from the volunteer’s perspective. You can organize the events however best fit your system but each should be viewed as part of the process of making contact with the volunteer, getting to know them, and making them feel more like a valuable part of your program. Any single event probably won’t give you or the volunteer the time to get to know one another.
2. In practice this means that, along with whatever else you want to accomplish during an event or interaction with a new volunteer, you should try to add to it an opportunity for them to get to know you better and for you to get to know them better.
3. Remember that from the volunteer’s perspective, they are still making up their mind about their new volunteering commitment and if things don’t work smoothly, it is relatively easy for them to suddenly “disappear.” During first contact with staff and other volunteers, it is easy for people to be very judgmental.
4. The main goal during onboarding is to give the new volunteer a sense of belonging. Volunteers who feel like they belong to a group working toward a common goal find more significance in their work. This, in turn, encourages them to participate more actively, meet challenges with enthusiasm, deal with setbacks, and feel a greater sense of responsibility and commitment. They will also tend to remain longer.
5. Another way to think about this objective is providing new volunteers with “points of connection” to the organization or group they are joining. Each of these points represents something to which the new volunteer can relate and feel a

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part of, and each then becomes a way of “attaching” the new volunteer to the new program. Some of these points include:

- **Social:** Getting to know their supervisor, other staff, and other volunteers. Relationships with others are one of the primary and most effective methods for volunteer retention.
- **Organizational:** Getting an introduction and orientation to the programs, paperwork, and system with which they will be working. It is also getting an explanation of the other terms, organizations, and common abbreviations with which the volunteer will be involved.
- **Cultural:** Discussing the values of the organization, such as answering the question “How do we behave?” During discussions of these values, you can learn a lot about what motivates the volunteer and whether they will work within the restrictions imposed by the SHIP or SMP.
- **Philosophical:** Learning the mission and purpose of their work. You can make this more real by showing the new volunteer evidence of the impact on beneficiaries of what the organization does.

6. Onboarding events are the perfect venues for providing a new volunteer with symbols of belonging: ID cards, access to restricted website areas, T-shirts, etc. It is also a good time for rituals that officially welcome the new volunteer as a member of the team. One aspect of belonging to a team is “being in the know,” so find something to share that isn’t public knowledge, even if it is just giving a talk on future plans of the program.
7. Part of onboarding involves training the new volunteer in their new role. This has three purposes: impart skills and knowledge; test acceptance and placement; and inculcate culture and behaviors. During training you have both a positive and a negative role: acknowledging and rewarding success as well as watching for and correcting contrary behaviors.
8. Trainings should be designed as much to allow the volunteer to express themselves as it is to allow the organization to teach. This is the only way to find out if the volunteer is really understanding and agreeing with what you’re telling them to do.
9. Toward the end of any session, have small group discussions asking what isn’t clear and what else they would you like to know followed by reports out and clarification. Some volunteers won’t like to admit that they didn’t understand – you’re more likely to surface issues in a small group and you can then deal with them.
10. Volunteering for SHIP or SMP is a knowledge-intensive activity, far more so than most volunteer roles. You should view this more as a benefit than as a barrier. Acknowledge the difficulty of some of what the volunteer will be doing. For example, explain



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that not everyone can learn this material. Remember that the volunteers you really want will cherish both the challenge and the opportunity to learn new things.

11. A lot of onboarding can be done in advance: agreements that need to be signed or conflict-of-interest disclosures, role descriptions, any shared tools (website access, calendars, etc.). The main reason for doing this is to get it done quickly so that you have more time for just talking during the actual onboarding meeting. The secondary reason is to try to make yourself look less bureaucratic and more user-friendly.
12. You can test your success by tracking the number of volunteers who drop out during their first few months of service. One way to minimize these dropouts is to have mentors for new volunteers. These mentors can strengthen all the connective bonds generated by the onboarding events. 