

30+ Questions for Assessing Onboarding Processes

Do your processes demonstrate these qualities?

1. **Continually improving** — When was the last time you tweaked your processes? What's working and what's not working?
2. **Transparent** — Have you clearly laid out what the steps will be, so they know what to expect? Can the volunteer easily see/understand their next step?
3. **Quick** — Where can you decrease the amount of steps/click/effort/waiting time?
4. **Flexible** — Whenever possible, can you give options for how to accomplish each step? Can you decrease the rigidity and create different pathways for different scenarios -- i.e. lower levels of screening for some roles? A quicker process for someone who volunteered with you before?
5. **Justified** — Make sure *you* understand the necessity of each of the steps and communicate the "why" to prospective volunteers.
6. **Relational** — Consider the formality of your process and your language! Can you make it more about getting to know the prospective volunteer and ensuring the role is a good fit for them?
7. **Motivational** — What's the carrot that will keep them moving toward the goal? Can you gamify the process?
8. **Tracked** — What percent of your volunteer inquiries make it through the process and end up volunteering with you?

What's your call to action that sets the application/screening/onboarding process in motion?

9. How many clicks does it take for prospective volunteers to find information on volunteer opportunities on your website?
10. How much information is available on your website? Consider that most people want to know what they're getting into before they take the next step.
 - a. For example, do prospective volunteers have access to the position descriptions?
 - b. Can they learn about the expected time commitment? Steps of the screening process?
11. When they find information on your website about volunteer opportunities, can they clearly understand what the first step is? Is there a clear (and concrete) call to action?
12. What is the call to action for potential volunteers?
 - a. Schedule yourself immediately for a low-risk opportunity?
 - b. Show interest in volunteering?
 - c. Fill out an application?
13. After they take the first step, how long do they generally wait to learn what comes next?

Regarding your screening processes...

14. How transparent are your requirements and qualifications, so that volunteers can screen themselves out and save everybody time? i.e., experience required, physical expectations
15. Do all of your volunteer opportunities require the same level of screening?
 - a. Which of your opportunities require a background check and which don't? And why?
 - b. Consider low-risk opportunities for prospective volunteers to dip their toes in, or try out right away.
16. How mutual is the screening process? How much does it focus on the volunteer learning about your mission and opportunities, so they can choose the right organization and role for them?
17. How intimidating are the steps of the process? Consider your language:

- a. "formal Interview" v. "chat to get to know you," "application" v. "interest form"
- b. Are the next steps clearly laid out, or do you lean on "we'll get back to you"?
- 18. How time-consuming are the steps?
 - a. How many questions are in your application? Are they all needed before meeting a potential volunteer?
 - b. Are potential volunteers able to move to the next steps of the process immediately?
- 19. What options do volunteers have, regarding how they complete the steps?
 - a. completing a form themselves vs. having a conversation where you collect information, online survey vs. sign-up app
 - b. What is the tone describing the screening process - welcoming, "we want to get to know you, find a good fit" vs. formal, "these are the steps that must be completed"

Once they are accepted as volunteers...onboarding!

- 20. Do you have an introduction/onboarding process? How many steps?
- 21. What are the main goals of your volunteer onboarding process? Does it achieve them?
- 22. What kinds of orientation and training does the volunteer receive?
- 23. How similar or different are the volunteer onboarding and employee onboarding at your organization? Is there anything from employee onboarding that would be helpful to mirror?
- 24. Does the volunteer have any choices about how they complete their onboarding? I.e., choose between a video training at night or in-person training during the day
- 25. How do you keep track of the volunteer's onboarding steps?

Places to start:

- 26. Identify: Where do you seem to lose people? Is there a pattern regarding the step that trips people up – where prospective volunteers seem to get confused or ghost you?
- 27. Assess: What percent of your volunteer inquiries make it through the process and end up volunteering with you? Have you seen any changes over time?
- 28. Consider the order of your process – are potential volunteers asked to do the hardest step first?
- 29. Ask your current volunteers about their experience screening and onboarding with you.
- 30. Ask your current volunteers how you can improve your screening/onboarding processes.
- 31. Have a person you trust go through the onboarding process to help you understand the volunteer's experience.
- 32. Reach out to volunteers who did not complete the process — no judgment! "We're just curious about how we can improve." Consider an anonymous survey to gather this data.
- 33. If you choose one goal for improvement, how will you track your progress? What we measure matters!

**Checklist created by MAVA Professional Development Committee Members,
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