Module 4: Volunteer Onboarding

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What will you achieve in this module?

This module will help your organisation welcome, prepare and integrate volunteers through a clear, inclusive and supportive onboarding process.

By the end of the module, you will be able to:

- prepare the organisation before the volunteer arrives;
- plan the volunteer's first day and first weeks;
- explain the role, responsibilities and boundaries clearly;
- provide training that is proportionate to the role;
- introduce tasks and responsibilities gradually;
- adapt onboarding to different learning and accessibility needs;
- support volunteers in face-to-face, online and hybrid settings;
- review and adjust the onboarding experience during the first month;
- make unwritten organisational norms explicit so that volunteers are not expected to guess them.

At a glance!	
Estimated reading time	20 – 30 minutes
Main outputs	Structured welcome, shared expectations, initial training plan and first-month review
Essential actions	Prepare before arrival, explain boundaries, provide training, assign support and introduce responsibilities gradually

Why onboarding matters

Onboarding is the structured process through which a volunteer is welcomed, informed, trained and integrated into the organisation. It turns the match agreed in **Module 3**(link) into an active, safe and meaningful volunteering experience.

A motivated volunteer may still feel lost when faced with unfamiliar procedures, unclear expectations, complex relationships or unexpected situations. Without appropriate preparation, volunteers may:

- feel unsure about what to do or whom to ask for help;
- misunderstand their role or responsibilities;
- make avoidable operational or safety mistakes;
- experience stress, isolation or emotional overload;
- unintentionally cross ethical or professional boundaries;
- leave the organisation shortly after starting.

Effective onboarding combines three elements:

1. **Information:** What the volunteer needs to know about the organisation, role and procedures.
2. **Training:** What the volunteer needs to learn or practise before working independently.
3. **Connection:** Who will welcome, guide and support the volunteer.

Remember: Onboarding is a process, not a single welcome meeting or a collection of documents.

The role of training in onboarding

Training connects the volunteer's motivation with the knowledge, skills and attitudes needed to contribute safely and effectively.

Knowledge

Volunteers should understand:

- the organisation's mission, values and activities;
- the purpose of their role;
- internal policies and procedures;
- safeguarding and safety requirements;
- confidentiality and data-protection rules;
- the volunteer agreement and insurance coverage;
- their rights and responsibilities;
- how to report a concern or emergency.

Skills

Volunteers should receive the practical and technical preparation needed to perform their tasks safely. Training reduces the pressure of having to guess what to do and helps prevent mistakes that could affect volunteers, staff or beneficiaries.

Attitudes and wellbeing

Onboarding should also prepare volunteers to:

- communicate respectfully;
- work with staff, beneficiaries and other volunteers;
- respect ethical and professional boundaries;
- engage with people from different backgrounds;
- recognise emotionally demanding situations;
- ask for support;
- protect their own wellbeing.

This is particularly important in roles involving children, older people, healthcare, crisis response or other sensitive contexts. Relevant and proportionate training helps volunteers feel competent, safe, valued and connected. It also reduces preventable pressure on staff.

Build your onboarding process

Organise onboarding around four stages:

1. Prepare before the first day.
2. Create a meaningful first day.
3. Support the first weeks.
4. Hold a first-month review.

Step 1 – Prepare before the first day

Preparation should begin as soon as the volunteer accepts the role.

Confirm the practical arrangements

Send clear information about:

- the agreed role and main tasks;
- the start date and schedule;
- the location or online access details;
- the expected duration of the first meeting;
- what to bring or prepare;
- the named contact person;
- available transport or expense support;
- whom to contact if plans change;
- note any cultural or linguistic context relevant to the volunteer or the role

Do not assume that the volunteer remembers everything discussed during matching.

Prepare the information and documents

Depending on the role and national context, prepare:

- the Volunteer Welcome Sheet;
- the volunteer agreement;
- insurance information;
- confidentiality and data-protection information;
- consent forms for privacy or image use, where relevant;
- safeguarding guidance;
- emergency procedures;
- the role description;
- initial training materials;
- essential contact details.

Explain the purpose of each document. Do not ask volunteers to sign paperwork they have not had an opportunity to understand or question.

Prepare the team

Before the volunteer arrives:

- inform relevant staff and existing volunteers;
- explain the volunteer's role and boundaries;
- confirm who will welcome and supervise them;
- assign a buddy or support person where useful;
- prepare the workspace, equipment and access permissions;
- ensure the team understands any agreed adaptations;
- avoid sharing unnecessary personal information about the volunteer.

Check accessibility

Confirm:

- physical access to all relevant locations;

- accessible toilets, workspaces and emergency exits;
- transport and scheduling arrangements;
- compatibility of digital platforms with assistive technologies;
- access to suitable devices and internet;
- language or communication support;
- adaptations required for materials, training or supervision.

Your action: Complete the relevant sections of the **Onboarding Checklist (link)** before the volunteer arrives.

Step 2 – Create a meaningful first day

The first day should help the volunteer feel welcomed, informed and connected. Avoid overwhelming them with too much information.

Welcome and introduce

- Welcome the volunteer personally.
- Introduce the coordinator, supervisor and buddy.
- Present the organisation's mission, values and activities.
- Introduce relevant staff and volunteers.
- Explain how the role contributes to the organisation and community.
- Provide a tour of the physical or digital workspace.
- Name any unwritten norms explicitly (arrival times, dress, greetings, break customs) rather than assuming they are obvious.

Review the role and expectations

Discuss:

- the role's purpose and tasks;
- what the volunteer may and may not do;
- working hours, breaks and attendance;

- communication and reporting arrangements;
- confidentiality and data protection;
- safeguarding responsibilities;
- health and safety procedures;
- ethical and professional boundaries;
- what to do in an emergency;
- how to ask questions or raise concerns.

Invite the volunteer to describe the role in their own words or ask practical questions. This checks understanding without turning the conversation into a test.

Agree on communication

Clarify:

- whom the volunteer should contact;
- which communication channels will be used;
- expected response times;
- how absences or delays should be communicated;
- how feedback will be given and received;
- how to request support or an adaptation.

End with a clear next step

Before the day ends, ensure the volunteer knows:

- what happens next;
- what their first task will be;
- whether further training is required;
- when the next check-in will take place;
- whom to contact if questions arise.

Step 3 – Support the first weeks

Onboarding continues after the welcome session. Introduce responsibility gradually according to the complexity and risks of the role.

Use:

- observation of experienced staff or volunteers;
- shadowing;
- demonstrations;
- supervised practice;
- clear and achievable first tasks;
- role-specific training;
- regular opportunities to ask questions.

Do not give a new volunteer independent responsibility for a sensitive task before they have received the necessary training and demonstrated that they understand the procedures and boundaries.

Check understanding

Providing information does not guarantee that it has been understood.

Use:

- practical demonstrations;
- short scenarios;
- open questions;
- opportunities for the volunteer to explain a procedure;
- supervised practice followed by feedback.

The purpose is to identify what needs to be explained or practised again, not to create unnecessary pressure.

Maintain connection

During the first weeks:

- schedule short and predictable check-ins;
- include the volunteer in relevant team communication;
- explain informal routines and unwritten expectations;
- recognise progress;
- respond to questions without judgement;
- address uncertainty before it becomes a larger problem;
- check in on whether anything about team communication or informal norms has felt unclear or unfamiliar

Step 4 – Hold a first-month review

Schedule the review during onboarding instead of waiting for a problem.

Discuss:

- what is working well;
- what remains unclear;
- whether tasks match the agreed role;
- whether the workload and schedule are realistic;
- whether training was sufficient;
- whether supervision and communication are working;
- whether adaptations are needed;
- how the volunteer feels within the team;
- whether cultural or communication misunderstandings have occurred;
- what the volunteer would like to learn next;
- cultural or communication misunderstandings, if any.

Feedback should be specific, constructive and respectful. Give the volunteer space to comment on the organisation and the support received.

Record the agreed actions, responsible people and deadlines. Confirm the next review date.

Keep in mind: Reviewing onboarding is not only about evaluating the volunteer. It is also an opportunity to evaluate how well the organisation welcomed and supported them.

Make onboarding inclusive and accessible

Accessible onboarding means offering information, training and support in ways that enable different volunteers to participate.

Make information accessible

- Use plain language.
- Explain technical terms and acronyms.
- Organise information into short, manageable sections.
- Combine written, visual, spoken and practical guidance.
- Provide audio, video, large-print, easy-to-read or translated materials where needed.
- Add subtitles and transcripts to audiovisual content.
- Allow volunteers to revisit materials.

Adapt the pace and method

Where possible:

- divide training into shorter sessions;
- provide breaks;
- repeat or demonstrate key information;
- offer live and recorded options;
- allow additional time for questions and practice;
- check understanding privately;
- adapt communication and supervision methods.

Do not reduce essential safety, safeguarding or role requirements. Adapt how volunteers learn and demonstrate understanding.

Make implicit rules explicit

Explain expectations concerning:

- dress;
- punctuality and breaks;
- use of phones;
- communication with staff and beneficiaries;
- hierarchy and decision-making;
- physical greetings and personal space;
- food, religious practices or cultural celebrations;
- ways to disagree or raise concerns.

Present these as organisational expectations, not as universally “normal” or “professional” behaviour.

Consider different circumstances

Where possible, provide flexible or blended onboarding for volunteers who are students, workers, caregivers or people facing transport, health or financial barriers.

Assign a named contact who can answer questions without judgement. A buddy may provide additional support, but should not replace appropriate staff supervision.

Adapt onboarding to the volunteering format

Format	Useful onboarding methods	Strengths	Points requiring attention
Face-to-face	Welcome meeting, site tour, introductions, demonstrations and supervised shadowing	Supports informal interaction and direct familiarisation with the environment	Physical accessibility, transport, scheduling, sensory environment and staff availability

Format	Useful onboarding methods	Strengths	Points requiring attention
Online	Welcome video call, accessible digital pack, virtual tour, live or recorded training and scheduled check-ins	Provides flexibility for remote roles and dispersed teams	Digital access, privacy, data security, isolation, time zones, cultural and religious calendars and relationship-building.
Hybrid	Online preparation combined with face-to-face orientation or practice	Offers flexibility while maintaining direct connection	Consistent information and equal participation across both formats

For online onboarding

Confirm:

- how the volunteer accesses platforms and files;
- which devices or software are required;
- how accounts and passwords are managed;
- which information the volunteer may access;
- where documents should be stored;
- what to do if a security or privacy issue occurs;
- how and when to contact a person;
- how the volunteer will be included in the wider team.

A digital pack is not enough on its own. Online volunteers also need human contact, opportunities to ask questions and a sense of belonging.

For hybrid onboarding

Create one clear plan showing which activities happen online and which take place face-to-face. Ensure that information, training, feedback and team participation are equivalent across both formats.

Adapt onboarding to the duration

Type	How to adapt onboarding
Short-term or one-off	Prioritise essential information, immediate task preparation, safety, boundaries, support contacts and closure. Keep the process concise but complete.
Long-term	Use progressive onboarding, deeper organisational orientation, ongoing training, learning goals and regular reviews. Introduce complex responsibilities gradually.

A short experience still requires appropriate safeguarding, confidentiality, safety and role preparation. Proportionate onboarding means adapting the depth and delivery—not removing essential information.

Do’s and Don’ts

Do	Don´t
Prepare the team, materials and access before arrival.	Improvise the welcome or leave the volunteer without a contact.
Explain tasks, boundaries and emergency procedures.	Assume motivation is enough for sensitive responsibilities.
Prioritise essential information and provide the rest gradually.	Overload the volunteer on the first day.

Do	Don´t
Introduce responsibility through supported practice.	Assign independent responsibility before training.
Explain agreements and privacy information plainly.	Present paperwork without explaining its purpose.
Use different ways to explain and demonstrate information.	Assume one training method works for everyone.
Make unwritten organisational norms explicit.	Treat one cultural or communication style as universally correct.
Give feedback privately, specifically and respectfully.	Use sarcasm, public correction or humiliating language.
Review the experience during the first month.	Wait for a serious problem before checking in.
Ask for feedback on the onboarding process.	Treat the review only as an evaluation of the volunteer.
Say unwritten norms out loud: arrival expectations, greetings, dress, communication style, rather than assuming they are self-evident.	Don't interpret a volunteer's unfamiliarity with an unstated norm as low commitment or poor attitude.

Good practices

- Use a standard onboarding checklist adapted to the role.
- Agree on mutual learning goals at the beginning.
- Provide a short welcome pack with essential contacts and procedures.
- Assign a named supervisor or contact person.

- Agree on first-week and first-month review dates.
- Check understanding through questions, demonstrations or supported practice.
- Introduce tasks and responsibility gradually.
- Keep training materials accessible and easy to revisit.
- Ask volunteers what would help them learn and participate.
- Improve onboarding using volunteer and staff feedback.

Useful additions

- a trained buddy;
- a short introductory video;
- an accessible organisational map;
- a glossary of common terms and acronyms;
- a peer welcome activity;
- a visual first-week schedule;
- a frequently asked questions document;
- recorded versions of key training sessions;
- a simple training-completion record.

Example in practice

Starting on a community helpline

Situation: A new volunteer is preparing to answer calls for a community helpline.

Risk: Assigning calls immediately could leave the volunteer unprepared to respond to sensitive situations, protect confidentiality or recognise when a call must be transferred.

What the organisation does: Before the volunteer answers independently, it provides safeguarding and confidentiality training, observation of experienced staff, supervised

practice and a first-week review. The volunteer receives clear escalation procedures and knows which situations must be transferred to qualified staff.

Learning point: Gradual responsibility, supervised practice and clear escalation procedures protect volunteers, beneficiaries and the organisation while building confidence.

Tools and templates

Tool	Purpose	Who uses it?	When?
Volunteer Welcome Sheet	Provide essential information, contacts and practical arrangements accessibly	Coordinator and volunteer	Before or on the first day
Onboarding Checklist	Plan, deliver and record the main onboarding actions	Coordinator or supervisor	Before arrival and throughout the first month
Country-Adaptation Notes for a Volunteering Agreement	Adapt the agreement to the national context	Organisation and appropriate legal or management staff	Before the volunteer begins
Country-Adaptation Notes for Privacy and Image Use	Support appropriate privacy, data-protection and image-use arrangements	Organisation, coordinator and appropriate data-protection staff	Before collecting data or images

Important: Templates do not replace legal advice. Agreements, privacy information, insurance and safeguarding arrangements must comply with the requirements that apply in the organisation's country and context.

Using AI in this module

AI may help prepare accessible materials, organise a training plan or simplify general information. It must not replace human welcome, role-specific training, safeguarding decisions, legal review or supervision.

Before using AI, follow **Module 0: Using AI responsibly** and your organisation's data-protection and AI policies.

Appropriate uses

AI can help you:

- turn a long onboarding document into a checklist;
- rewrite general information in plain language;
- draft a first-week schedule;
- prepare role-related training scenarios;
- create questions to check understanding;
- adapt general content to different formats;
- draft a glossary of organisational terms;
- summarise anonymous onboarding feedback.

Important limits

Do not use AI to:

- replace direct interaction with the volunteer;
- make safeguarding, disciplinary or legal decisions;
- decide whether a volunteer is ready for independent responsibility;

- assess emotions, personality or psychological suitability;
- process identifiable or sensitive information in publicly available tools;
- create legal agreements or privacy notices without qualified review;
- determine what is culturally appropriate for a person or community.

A named staff member must verify the accuracy, accessibility, tone, context and safety of all AI-generated materials.

Example prompts

- **Create an onboarding plan**

  "Create a two-week onboarding plan for the following volunteer role. Separate essential first-day information, training, supervised practice and review activities. Include the purpose, responsible person and expected outcome of each activity."

- **Simplify information**

  "Rewrite the following general onboarding information in clear English at approximately B1 level. Explain acronyms and preserve all essential safety, safeguarding, confidentiality and data-protection information."

- **Prepare training scenarios**

  "Create three short fictional scenarios to help volunteers practise boundaries, asking for support and escalation procedures. Do not include personal data or ask volunteers to make professional safeguarding decisions."

Reflection questions

- Is everything ready before the volunteer arrives?
- Does the volunteer understand the role, boundaries and commitment?
- Have we prioritised the information needed to begin safely?
- Is training proportionate to the tasks and risks?

- Can the volunteer access and understand the materials?
- Have we made informal rules and cultural expectations explicit?
- Does the volunteer know whom to contact and how to raise a concern?
- Are responsibilities introduced gradually?
- Have we scheduled first-week and first-month reviews?
- How will feedback improve future onboarding?
- Have we made our unwritten norms explicit, or are we expecting volunteers to guess them?

Key takeaways

After completing this module, your organisation should be able to:

- treat onboarding as an ongoing process rather than a single event;
- prepare the team, documents, access and support before arrival;
- combine essential information, practical training and human connection;
- explain responsibilities, boundaries and escalation procedures;
- adapt content, format and pace without weakening safeguards;
- introduce independent responsibility gradually;
- support face-to-face, online and hybrid volunteers;
- review both the volunteer's experience and the organisation's support;
- Onboarding is where intercultural competence first becomes practical since making implicit norms explicit protects volunteers from being unfairly judged for not knowing them.

Before moving to Module 5: Confirm that the volunteer understands the role, has completed the essential training, knows whom to contact and has a scheduled review. Then continue to **Module 5: Follow-up and Guidance.**

References and further reading