

# 3 STEPS TO SUCCESSFUL SCREENING OF VOLUNTEERS

By Nancy Macduff



Once a volunteer has been recruited, the screening process is used to ensure an appropriate placement, to assess the volunteer's skills and to eliminate undesirable applicants. Screening will provide information to both the organization or agency and the volunteer. The volunteer learns more about job expectations, training requirements and the supervisory style of the volunteer administrator. The volunteer administrator assesses the volunteer's personal history as it applies to the requirements of the job. This assessment can protect the agency from inappropriate placements.

There are three essential steps or elements to the screening of a volunteer: application, interview and contract. Each step provides different types of information and commitment from the volunteer and the organization.

## The Application

A volunteer application is usually completed prior to the interview. It is possible, however, to have a person fill out an application as part of the interview. Decisions about timing for taking applications and interviewing depend on agency or organization policy, the job description and the

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volunteer. Nevertheless, there should be consistency in the application process. It is not a good idea to vary the timing from one volunteer to another.

The application asks for basic information such as name, address, home and work phone, availability to work, previous volunteer experience, employment and education, health limitations and references from individuals who know the applicant (but who are not friends or relatives).

This information provides clues as to the most suitable placement for the volunteer. An individual with many years of executive clerical work, for example, might enjoy taking a leadership role in organizing the record-keeping system for a volunteer program. The application gives information that allows the volunteer administrator to check with others to make certain that the volunteer has the capability to carry out the position's responsibilities.

The volunteer's references should be checked. Volunteer organizations and agencies with volunteer programs have been facing increased liability insurance costs. To protect clients/members and the organization, it is essential to check references listed by the applicant and to do a criminal records check when appropriate.

In checking references, the volunteer administrator should ask a set of standardized questions, which should be the same from one check to another.

## The Interview

Interviews are an extension of the applica-

tion, which lists previous volunteer experience. The interview gives both parties the opportunity to discuss the new volunteer position and to determine how the volunteer's experience can apply in the new situation.

Here, the volunteer and the interviewer are sharing information. The volunteer learns about the agency and/or program, how it functions and how he or she would fit in. The volunteer also begins to determine how volunteers are treated in the program.

The interviewer is learning about the volunteer's background, interests, training needs and limitations. He/she is determining how this volunteer will fit in with other volunteers already on the job.

This meeting of the minds between the agency representative and the volunteer helps both sides make the right choices. Having a volunteer decide against the position at this point is not necessarily bad. A disgruntled volunteer can be a time-drain on a busy volunteer administrator.

The person conducting the interview needs to know everything possible about the job, including the type of skills required to do the job successfully. The process cannot be rushed. It should be designed so the volunteer does the talking. The interviewer must guard against preset judgments, e.g., elderly people are too frail for this work.

Since the interview is yet another place where the volunteer is judging whether he/she wishes to be affiliated with this organization or agency, an organized, profes-

sionally conducted interview sends a message to the volunteer about the quality of the organization and its program.

### The Contract

If the interview and reference check are favorable, there is one last step in the screening process—the contract. It clearly outlines expectations on both sides. For the volunteer, the contract spells out what the volunteer will be doing for the program, the amount of time the volunteer is expected to stay with the program, and

what the program will do to support the volunteer in those efforts.

The contract allows the organization to spell out its expectations, responsibilities, time-lines and training for the volunteer. In so protecting itself, the agency or organization is showing the seriousness of its commitment to the clients or members.

On a contract, the organization can indicate that the volunteer will not have a full-fledged assignment, for example, until he/she completes a first-aid class. The volunteer might ask for special training to

be more comfortable in doing the job. It is a last chance for everyone involved to look at the commitment.

The volunteer and the volunteer administrator sign the contract.

The contract sends a message to the volunteer about the importance of the entire volunteer program. It is tangible evidence of our respect for volunteers and the jobs they do.

You can examine the quality of your current screening program by completing the following self-assessment tool.

## VOLUNTEER SCREENING ASSESSMENT CHECKLIST

- \_\_\_\_\_ 1. Does your application form include a request for references who are not relatives or friends?
- \_\_\_\_\_ 2. Is there a statement on the application form that requires a signature, giving permission for a criminal records check? (Especially important for volunteer positions that require working with children and vulnerable adults.)
- \_\_\_\_\_ 3. Are references routinely checked?  
\_\_\_\_\_ Are the same questions asked of everyone?
- \_\_\_\_\_ 4. Are criminal records checks made when appropriate to the volunteer job?
- \_\_\_\_\_ 5. Are volunteers who work with children or vulnerable adults always personally interviewed?
- \_\_\_\_\_ 6. Are there written policies and procedures that govern the behavior of adults in relationship to children or vulnerable adults?  
\_\_\_\_\_ Are they discussed during the interview?
- \_\_\_\_\_ 7. Are training opportunities/requirements explained to volunteers during the interview?
- \_\_\_\_\_ 8. During training does staff have the opportunity to assess volunteers in situations that simulate what they will experience when working in their volunteer job?
- \_\_\_\_\_ 9. Does the organization have a code of conduct that is reviewed when the contract is signed?
- \_\_\_\_\_ 10. Is the contract personalized for each volunteer?
- \_\_\_\_\_ 11. Do volunteers acknowledge, in a signed statement, that they have received and read policies, procedures and codes of conduct?
- \_\_\_\_\_ 12. Do interviewers use non-directive questioning techniques?
- \_\_\_\_\_ 13. Do professional staff or appropriate volunteers make unannounced visits to volunteer work sites as part of the continuous screening process?
- \_\_\_\_\_ 14. Is the screening process regularly reviewed?