

Sharing Our Success (SOS) Submission Form

Chapter Name:	San Diego
Chapter Membership Size:	Medium (101-299)
Chapter Contact Person:	Amelia Curtis
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Phone Number:	
Chapter Board Position:	Director of Volunteer Experience and Engagement
Chapter Website URL:	https://www.tdsandiego.org/
Submission Title:	Volunteer Onboarding
What did you do? (a 2-3 sentence summary of your effort):	I developed a streamlined process for onboarding volunteers in order to clarify the process both for the volunteer and the board member they are volunteering with. The process includes a detailed checklist that board members can reference to understand what steps are taken to fully onboard a new volunteer and who is responsible for overseeing each the steps. The process includes an application, interview, placement in a role including a job description, orientation, training, and regular check-ins.
Who benefitted from this effort (Target Audience) Check all that apply:	<input type="checkbox"/> Board Members <input type="checkbox"/> Chapter Volunteers <input type="checkbox"/> Potential Chapter Members

Why did you do it? What chapter needs were addressed?

As I began to create a process for onboarding our volunteers, I noticed it was unclear what a board member's role was when they were assigned a new volunteer in their area. I also noticed that the application process and steps were not explained to the incoming volunteers. I had been a volunteer myself the year before and was unsure what the process and timeline was as I was onboarded and what my exact volunteer role was as I began volunteering. My checklist process helps to outline what is expected both of the board member and the volunteer throughout the onboarding process. The clarity the checklist provides helps members decide if volunteering for our chapter would be a fit for them right from the start. It provides them with our expectations and who to go to for guidance and questions about each topic. It has also helped board members focus on training the volunteers to do the role specific tasks and know that the volunteer has already been onboarded properly (application, interview orientation, job description) by the time the two parties are connected.

What were the measurable outcomes? (May include data regarding financial gains, membership increases, target audience satisfaction levels, publicity for the chapter or for the profession, etc.)

- grew our active volunteer pool from three to eleven volunteers
- three volunteers applied to become board members
- one volunteer presented a new tool/ idea at a board meeting
- three volunteers are receiving awards at our holiday party
- two volunteers provided ideas and feedback to better engage volunteers next year
- only one out of nine new volunteers resigned after going through the new process

What steps did you take to implement this effort? (Remember that other chapter leaders will use this to replicate the effort. Be specific)

1. Interviewed a volunteer engagement team at a nonprofit organization that manages large amounts of volunteer to generate ideas.
2. Drafted a proposal and asked for feedback from the board.
3. Completed the checklist process and compiled and created any supporting documents such as the orientation slides and job descriptions. Board members also assisted in writing job descriptions for their roles.
4. Presented the process to the board.
5. Used the process with all incoming volunteers.
6. Had any current volunteers catch up on missing steps.
7. Asked the board for feedback on the process and made any changes.
8. Asked the volunteers for feedback on their entire volunteer experience.

Is there anything you would do differently?

I would have liked to have researched the processes for other ATD chapters to see if there were any new ideas to incorporate including better ways to recruit volunteers in addition to onboarding them and to gain access to any useful templates.

When did you start working on this effort?

Jan 01, 2025

When did this effort go live?

Apr 01, 2025

Approximately how many hours were spent working on this? Include an estimate of hours spent across all board members and volunteers.

80

What resources did you use? Check all that apply:

Board Members

Which board positions were involved in the effort?

Director of Volunteer Experience and Engagement, President, President Elect, all other board members provided general feedback and assisted in writing the job descriptions for their roles.

Do you have any additional insights to share with other chapters implementing this effort?

The more clarity you provide in onboarding a volunteer, the more likely they are to follow through. In our case, the steps were clear and simple enough that volunteers could really focus on excelling and special projects in their roles.

Please attach any documents that help support this submission. It is highly encouraged to submit editable files (ex. Word, Excel, etc): (additional documents and documents over 2MB should be sent to sos@td.org)

<https://www.formstack.com/admin/download/file/18727889720>

additional supporting documents: <https://www.formstack.com/admin/download/file/18727889737>

additional supporting documents: <https://www.formstack.com/admin/download/file/18727889741>

How did you become familiar with the Sharing Our Success (SOS) program? Select all that apply:

Chapter Leader

Would you be willing to apply to present on this submission at the ATD Chapter Leaders Conference (ALC)? *Request for Proposals (RFPs) open in May of each year at td.org/alc. Selected session facilitators receive complimentary registration.

email_consent true
