



# VSys Voices: Documenting your Onboarding Process





# VSys Voices Presenters



**Karina Vargas, CAVS**, has over 20 years' experience in volunteer management at all levels, ranging from working with Board-level professional volunteers to high school students. She spent over ten years managing volunteers for a large children's hospital where she developed volunteer leadership programs, presented interactive customer service trainings, and provided expert-level technical and leadership support to the volunteer program. Karina has a B.S. in Human Services from California State University, Fullerton and also has a CompTIA Project+ certificate in project management.



**Lisa LaVigna, DM** is the Vice President of Business Development & Sales at Bespoke where she focuses on helping existing and prospective VSys clients maximize their use of VSys One to reduce their workload and improve the volunteer experience. She previously worked at a nonprofit college as the Executive Director of Partnerships where she focused on recruiting, admissions and building strong relationships. Lisa is on the board of Jazzy Sun Birthdays, an organization that organizes birthday parties for children in homeless shelters. She also volunteers weekly at a local shelter for women and children

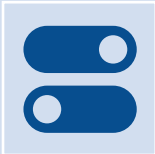




# Objectives for today's webinar



Discuss advantages of documenting your onboarding process



Walk through examples of Onboarding Process Maps

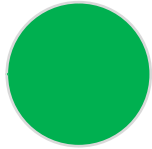


Tips for creating process maps



# Target audience for today's webinar

## SKILL LEVEL



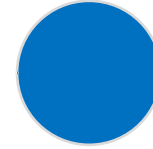
### Minimal Knowledge

Looking for some basic information, key principles and “how-to’s” on the subject.



### Working Knowledge

Integrated practices and moving beyond basic concepts. Looking for breadth and depth on a topic



### Authoritative Knowledge

Looking for advanced knowledge, integration and concepts that are innovative and cutting edge.

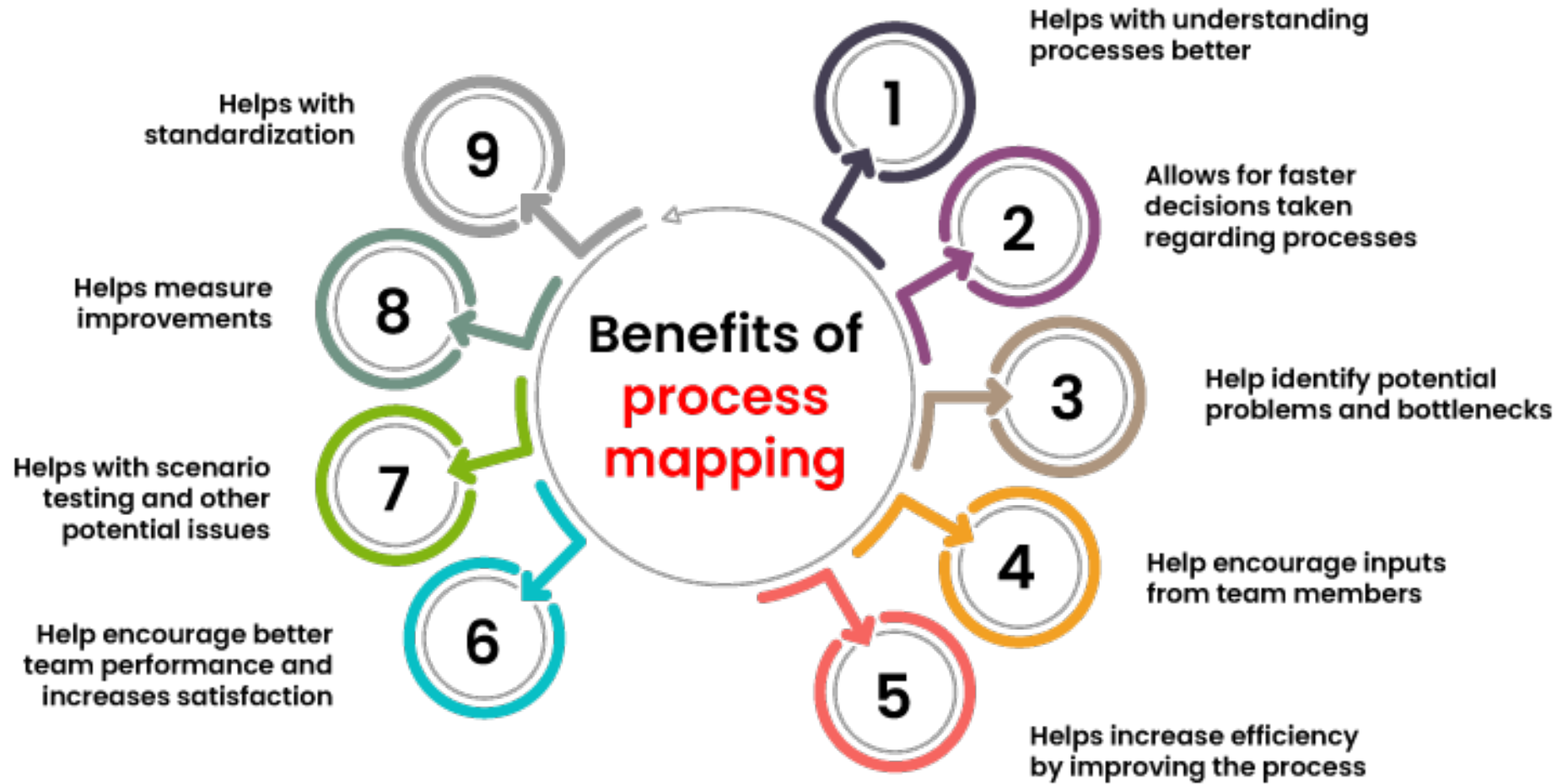




# Why document?



# Why map?

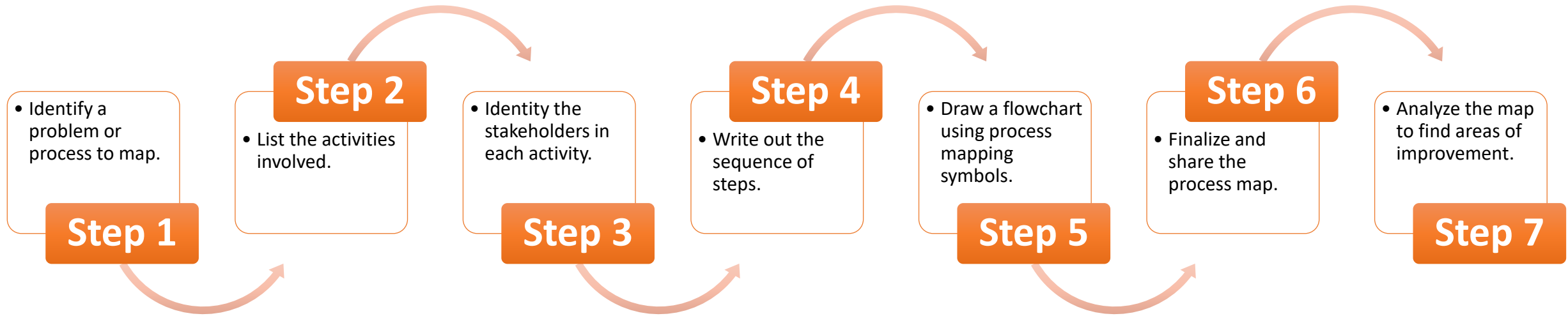




# Tips for process mapping

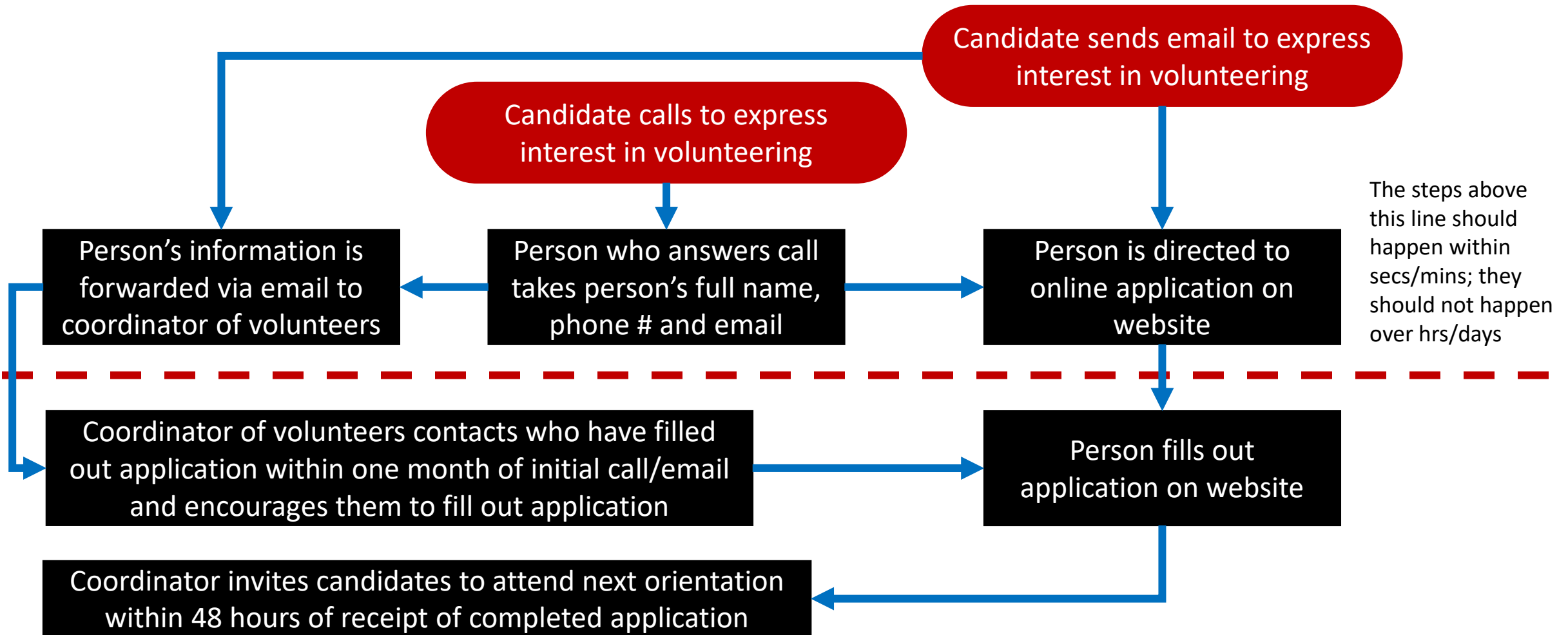


# How to create a process map





# Example: Volunteer Onboarding Process





# Tips

- Engage all stakeholders or at least a person from each functional area.
- Sticky notes are your friend
- CLEARLY identify a problem or process to map. Don't go too BIG.
- Define the Start & End
- Walk through the process with a couple real-life examples
- Revisit it regularly

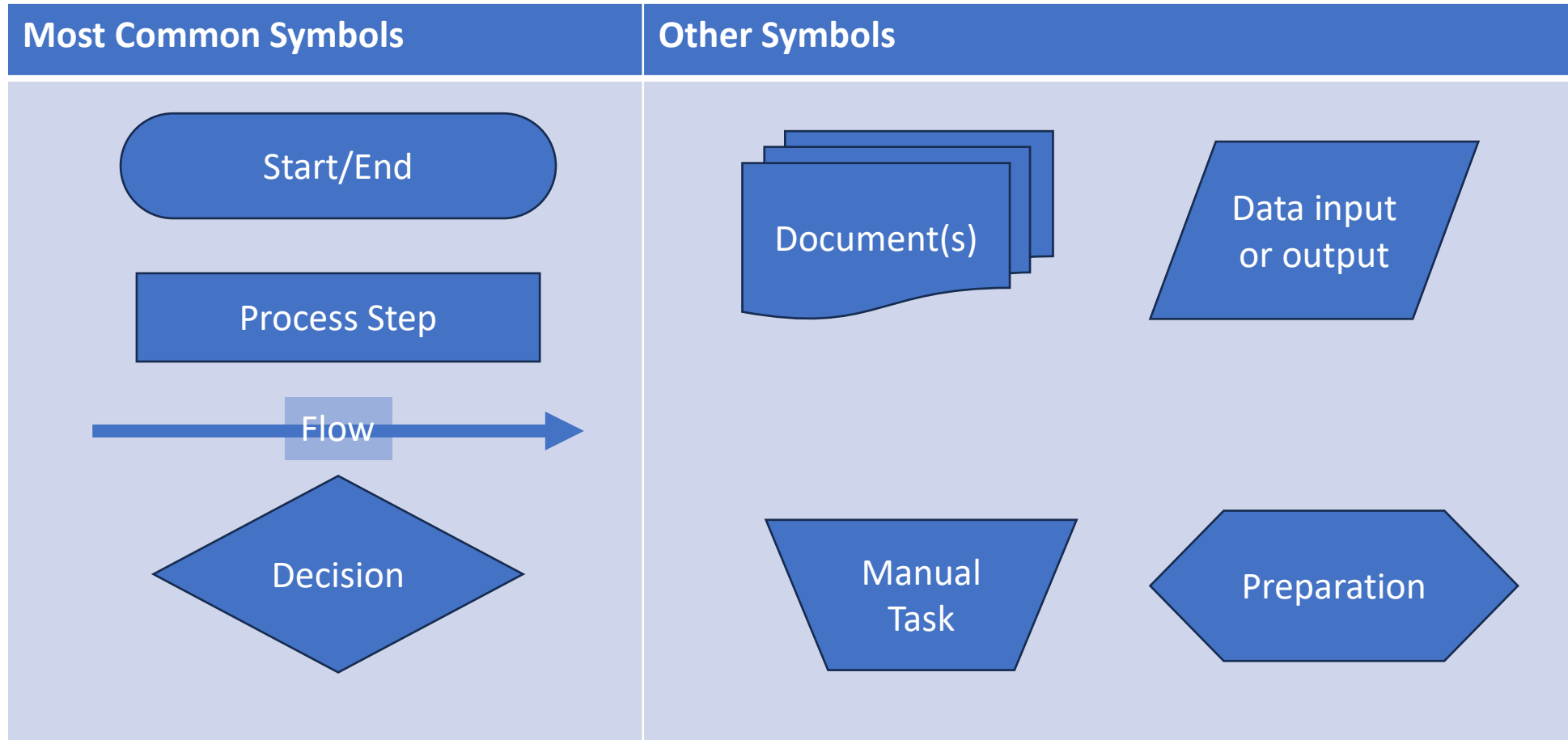




# Examples of Process Maps



# Process Mapping Symbols

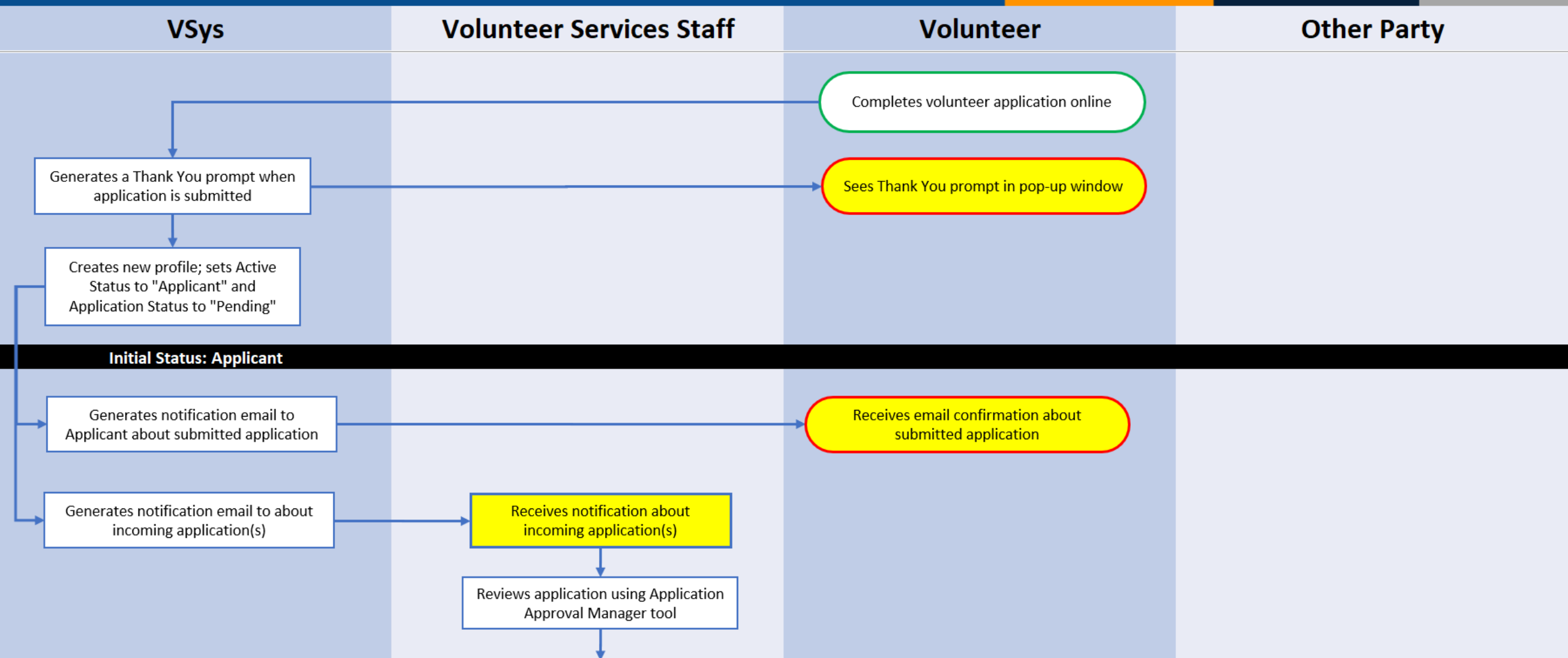


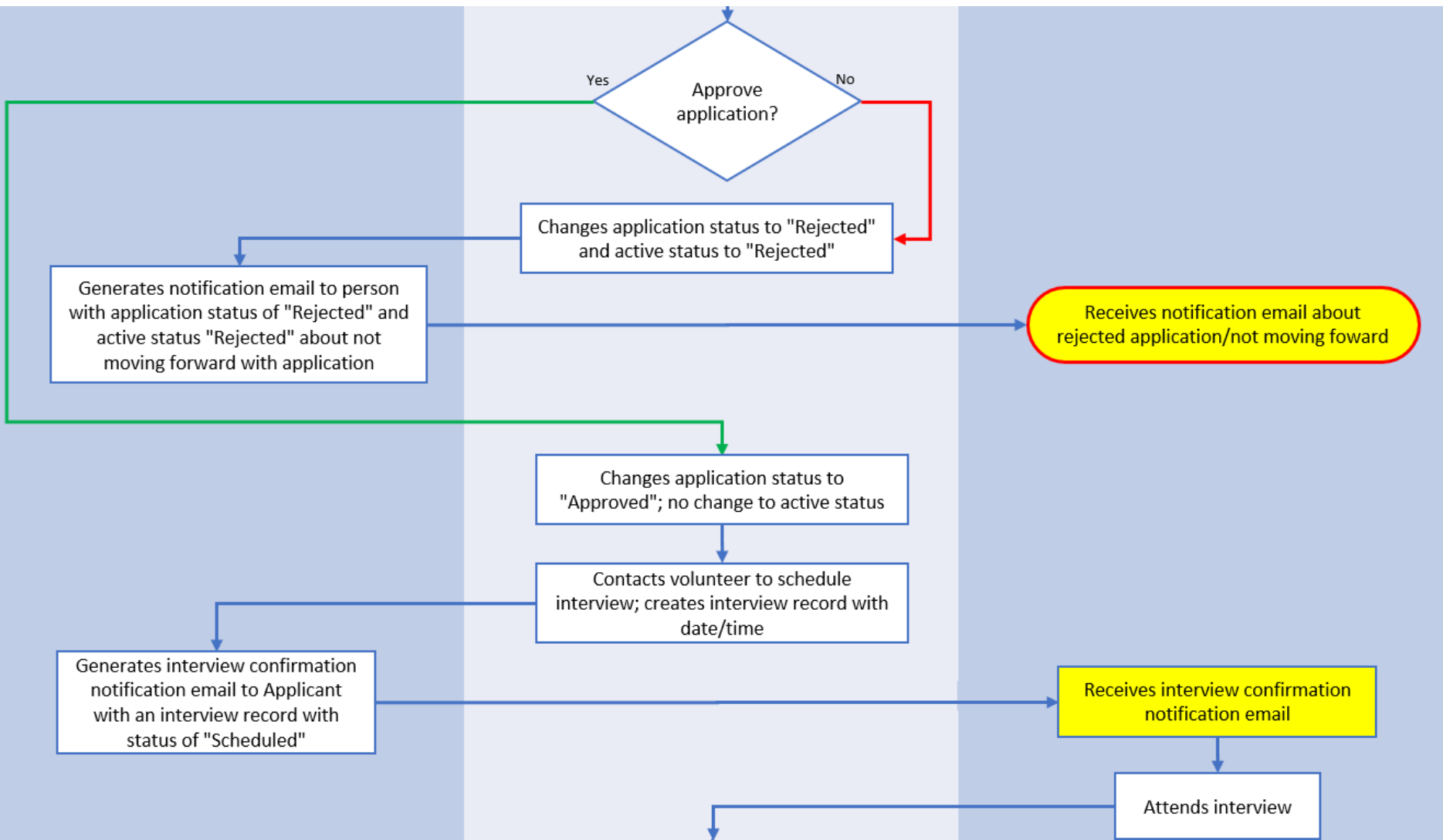


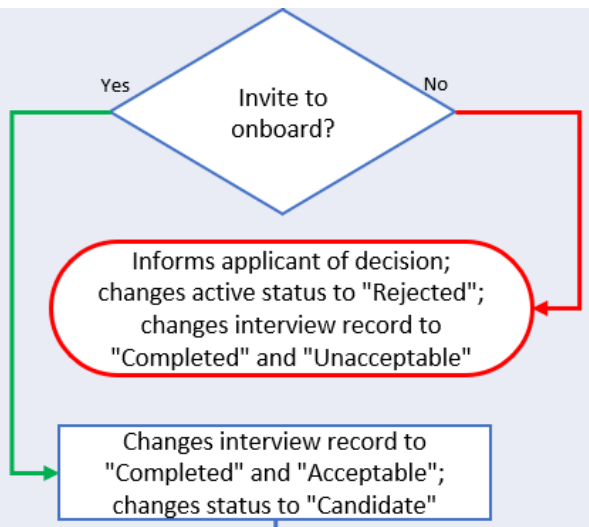
Process Described: **Volunteer Onboarding Process**

**LEGEND**

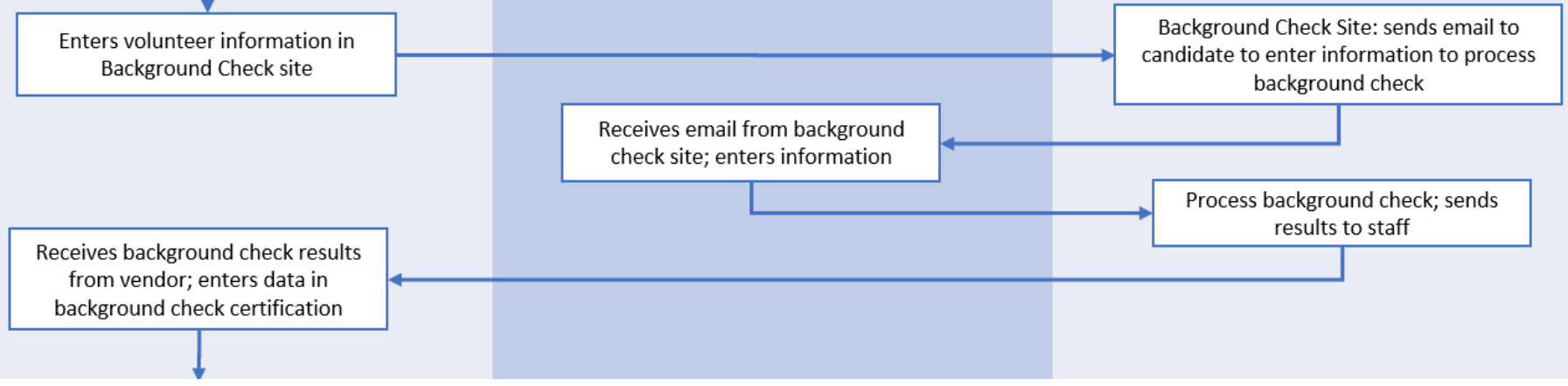
- start or end of process
- decision to make
- steps in process
- outbound communication

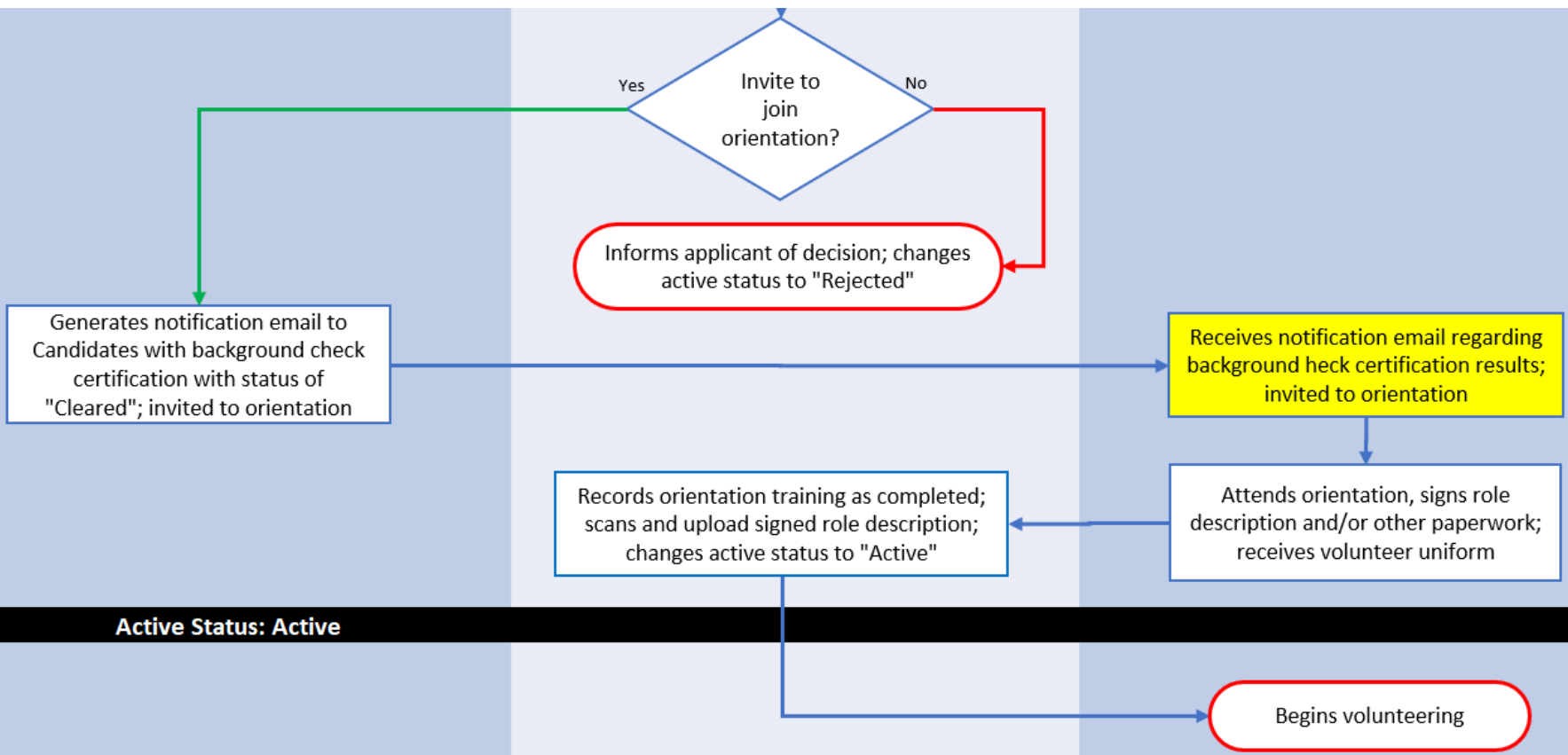






Active Status: Candidate







	Volunteer Management System	Staff	Volunteer	Other resources
<b>Step 1 - Volunteer Application</b>				
			Fills out an application	
	Produces thank you message		Sees thank you message	
	Sends thank you email		Receives thank you email	
	Creates volunteer profile			
<b>Step 2 - Review Application</b>				
		Reviews application		
If no		Changes volunteer status to Rejected		
	System generates Rejected email		Volunteer receives rejected email -END	
If Yes		Changes volunteer to Prospect	Continues to Interview step	
<b>Step 3 - Interview</b>				
		Sends email to invite volunteer to interview	Volunteer receives interview invite/sign up instructions	
			Volunteer schedules interview online	
	Sends interview confirmation to volunteer		Volunteer receives interview appt information	
		Interview happens	Interview happens	
If no		Records interview as negative		
	Sends email for not going forward		Volunteer receives email not going forward - END	
If yes		Records interview as positive		

# ONBOARDING TIMELINE

Supervising  
Staff

Volunteer  
Services

Volunteer

## Volunteer's First Day

### Planning

**When?**

20+ Volunteers = 12 weeks  
10-19 Volunteers = 8 weeks  
Specialized Skills = 8 weeks  
New Positions = 8 weeks  
1-9 Volunteers = 6 weeks

### Search

**When?**

20+ Volunteers = 10 weeks  
10-19 Volunteers = 6 weeks  
Specialized Skills = 6 weeks  
New Positions = 6 weeks  
1-9 Volunteers = 4 weeks

### Selection

**When?**

At least 4 weeks before  
volunteer's first day.

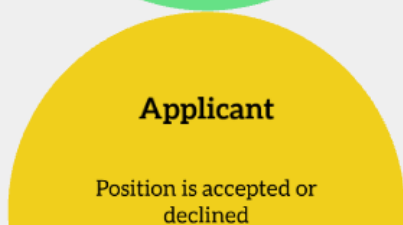
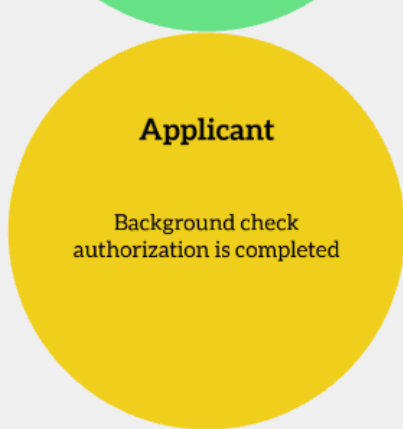
### Placement

**When?**

At least 2 weeks before  
volunteer's first day.

**NOTE:** If you already have identified a candidate and position description, skip to Placement process



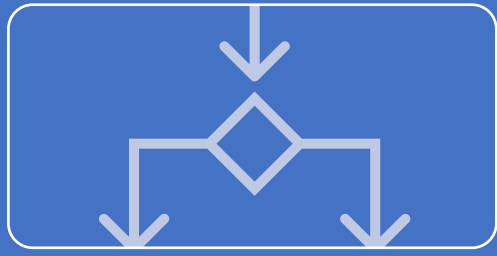




# Questions? Open Discussion



# VSys One Resources



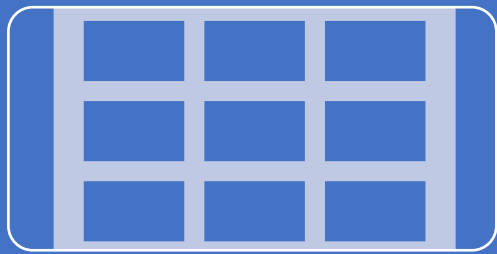
## Blank Excel Template for Process Map

- <https://www.vsysone.com/download/SampleOnboardingProcessMapTemplate.xls>



## Sample (completed) Process Map

- <https://www.vsysone.com/download/SampleOnboardingProcessMapComplete.pdf>



## Sample chart form for Process Map

- <https://www.vsysone.com/download/SampleOnboardingWorkflowChart.xlsx>



# Other Resources

**Jane Craven:** <https://coyotecommunications.com/coyoteblog/2010/12/your-flow-chart-for-volunteers/>

**Prezi:** <https://prezi.com/4dekkbjrnpr/volunteer-onboarding-timeline/>

**Journey mapping for NGOs:** <https://www.smaply.com/blog/journey-mapping-in-ngos>





# Thank you for joining us

