

VOLUNTEER INDUCTION

An Induction Checklist for New Volunteers and Management Committee Members

Welcoming new volunteers is about creating a warm, welcoming environment that sets them up for success. The importance of properly inducting new volunteers often goes unnoticed, but it can be the difference between a new volunteer staying for the long term or feeling burnt out. When welcoming new volunteers, you should strike a balance, providing them with enough information to get them started but not overwhelming them.

Tip: A well-structured induction program can help them understand their responsibilities, connect with the team and feel comfortable in their new role.

The following checklists provide a base outline you can use to develop an induction program for your new management committee members and volunteers.

MANAGEMENT COMMITTEE INDUCTION

The time when new committee members join is critical for both the committee members themselves and the organisation. As they transition from outsiders to insiders, they can't be expected to immediately understand their responsibilities or how the organisation functions day-to-day. A well-planned induction process reduces stress for new committee members, helps them feel welcomed and can decrease the likelihood of turnover.

Your induction program should be simple and manageable. It's about setting a positive first impression, but not overwhelming new members with too much information. Here are some key elements to include:

Make them feel welcome

Introduce them personally to all other committee members, as well as other key personnel like administrators, bookkeepers, head coaches, age group coordinators and leaders of business units like the canteen and merchandise.	<input type="checkbox"/> Introductions
Show them around so they know where to find essentials like the coffee machine and toilets.	<input type="checkbox"/> Facility tour
Let them know who they can turn to with questions.	<input type="checkbox"/> Reporting lines
Share your history, values, vision and mission.	<input type="checkbox"/> About the organisation



Tip: It's helpful to assign a mentor to new committee members to explain the specific activities expected of them and to provide ongoing support.

The legal structure, constitution and affiliation

Provide an overview of the organisation's legal structure. Explain what it means to be a not-for-profit organisation. It's important to clarify that 'not-for-profit' doesn't mean 'no profit'.	<input type="checkbox"/> Legal structure and not-for-profit
If affiliated with peak bodies, describe the details of the affiliation and the requirements.	<input type="checkbox"/> Affiliation details
Walk them through the constitution. This walk-through should include what's covered in the constitution and how to use it.	<input type="checkbox"/> Constitution
Discuss what is addressed in other documents like bylaws and policies.	<input type="checkbox"/> Bylaws and policies

Personal liabilities and duties

Let new management committee members know about their personal liabilities and how to avoid getting in trouble. This includes acting in the organisation's best interest, acting in good faith, acting with reasonable skill, care and diligence, not improperly using their position or information, not trading while insolvent and disclosing and managing conflicts of interest.

Liabilities and duties

Meetings

Provide an overview of what meetings committee members are expected to attend and what their roles in these meetings will entail.

Meeting schedule and roles

Essential information

Provide written copies of important documentation, such as health and safety guidelines, codes of conduct, legalities (committee member rights, liabilities, insurances, working with children, confidentiality, data protection), names and contact details of relevant people and the strategic plan.

Handover of documentation and access

Ensure they have access to the club's files online and any software/online systems the club uses. See the handover checklist on the next page.

Understanding the role

Explain the specifics of their role, including their particular responsibilities, expected time commitment and schedule.

Responsibilities and schedule

Discuss the organisation's expectations of the committee member and the committee member's expectations for the role.

Expectations

Confirmation

While some organisations may feel uncomfortable asking committee members to sign off on their induction, it is a good idea to have them acknowledge in writing that they have received and understood the information shared during the induction process.

Completed and signed

Name

Date

Sign

AFTER INDUCTION



A good induction program helps new committee members and volunteers understand their roles and feel comfortable and confident in their new positions. After the induction program is completed, set a date for a catch-up to see how everything is going. Remember to provide recognition and make volunteers feel valued and appreciated. You can host social events to support volunteers in feeling connected and welcomed. Regular training and professional development opportunities can support volunteers' ongoing improvement.

HANDOVER CHECKLIST

A handover checklist can help ensure a smooth transition between outgoing and incoming committee members. It helps to maintain continuity and efficiency in the club's operations. Here are some key elements that should be included in your committee handover checklist:

- Constitution, bylaws and any policies and procedures (e.g. Codes of Conduct)
- Financial records
- Bank accounts (including transferring signatories)
- Insurance (e.g. public liability, building and contents, volunteer workers insurance)
- Lease and any other tenure instruments
- Licence details (e.g. liquor, gaming, food handling)
- Legal contracts or agreements
- Safety and statutory inspection details (e.g. fire, electrical, asbestos, gas, plumbing)
- Maintenance obligations and maintenance schedule
- Property and inventory
- Strategic plan
- Document templates
- Previous meeting agenda, minutes and schedule
- Member list
- Calendar of events
- Important dates (e.g. affiliation, purchasing)
- What worked well and what should change
- Important contact details (e.g. sponsors, suppliers, Council)
- Login credentials or admin access and payment/renewal details for:
 - Website
 - Email
 - Social media accounts
 - Cloud file storage
 - Grant portals
 - Other subscriptions and software (e.g. payment gateways, financial software, membership management system, competition management software, survey software, design software)
- Update all passwords and remove access for non-current volunteers and staff
- Details of external relationships (e.g. local elected representatives, peak bodies, Council and government officers, sponsors, suppliers, venues)
- Details of regular activities required under each role
- Details of ongoing support available to incoming volunteers
- Update contact details with governing bodies and government agencies



VOLUNTEER INDUCTION

It's important to have an induction process for general volunteers. It doesn't need to be complex. It can be a simple checklist to ensure your new volunteer feels welcome and is prepared with the information they need to start their role. Here are some key elements to include in a general volunteer induction program.

Make them feel welcome

Introduce them to key personnel and other volunteers.	<input type="checkbox"/> Introductions
Show them around so they know where to find essentials like the coffee machine and toilets.	<input type="checkbox"/> Facility tour
Let them know who they can turn to with questions. It's helpful to assign a mentor to new volunteers to explain the specific activities expected of them and to provide ongoing support.	<input type="checkbox"/> Reporting lines/mentor
Share your history, values, vision and mission.	<input type="checkbox"/> About the organisation

Role explanation

Explain the specifics of their volunteer role, including responsibilities and expected time commitments, if there are specific benefits they'll receive (e.g. a meal voucher while on duty) and details of the support they'll receive (e.g. access to training and resources).	<input type="checkbox"/> Role description
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Safety briefing

Ensure volunteers understand relevant workplace health and safety guidelines and procedures. This includes providing them an induction in the safe use of equipment, emergency procedures and who to report to in the event of any safety concerns or incidents. Volunteers should be requested to confirm in writing that they have been properly briefed in the safe use of equipment and materials, including tools, chemicals and machinery.	<input type="checkbox"/> Workplace health and safety
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Access to information

Provide volunteers with access to relevant documentation and resources. This could include the constitution, codes of conduct, volunteer rights and responsibilities and any specific information relevant to their role. Ensure they have access to any relevant files online or software/online systems the organisation uses.	<input type="checkbox"/> Documentation and access
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Confirmation

Name

Date

Sign

It is a good idea to have them acknowledge in writing that they have received and understood the information shared during the induction process.	<input type="checkbox"/> Completed and signed
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The induction process for general volunteers may be less formal than for committee members, but it is still helpful in ensuring they are provided the necessary skills and instruction to complete their jobs safely and effectively, while feeling part of the team.

After their induction, follow up with each volunteer to see how they are going. Provide ongoing support and make volunteers feel valued and appreciated by regularly and personally thanking them for their efforts. Offer further training for volunteers as appropriate to help them grow in their roles.

BOARD INDUCTION SESSION



CPR Group offers board induction sessions for **new and continuing committee** members covering topics such as statutory obligations, your constitution and best practice in governance.