

Guide to Intake Meetings with Prospective Volunteers

Volunteer recruitment and placement is partly intuitive “reading” of people and personalities and partly problem solving. Follow the “Who, What, When, Where and Why” process for a successful and sustaining match of volunteer skills to organization/department needs.

Initial Meeting: Set up a personal informational meeting with a potential volunteer if possible. Face to face always gives the best information and a chance to make a solid connection. Create an inviting atmosphere for the volunteer interview and fact finding, and set a meeting time and place that is convenient for the volunteer. Focus on him/her. Limit your personal stories.

Who: Begin with a conversational tone to discover the person’s skills and strengths, work history, hobbies, and personality. “Who are you?”

- Be on time and give your complete attention to the interviewee.
- Be professional and warm but direct and concise. Ask permission to take notes.
- Learn what motivates the volunteer and get a feeling for the person’s personality.
(ex. Likes to be in charge, likes to follow, likes to be creative, and is analytical)

What: Ask leading questions requiring more than a “yes” or “no” about previous work and volunteer experience. Cover the positives and negatives.

- What did the volunteer do? The list can illustrate the person’s self-image and values.
- What was satisfying and what could have been improved?
- What type of supervision and training was provided and did it meet expectations?
- What was the length and process to become a volunteer?

Why: Cover the chronology of the volunteer’s history.

- “Tell me about yourself”. Listen. (Ask about aspects of the volunteer, education, and work or professional history and refer to notes taken during the “What” phase)
- Move to hobbies and special interests and discover why they are important
- Why are you interested in volunteering? Have you volunteered in the past? If not, do you know someone who has?

When: Limitations and preferences

- Days and time preferred for volunteering, transportation, and travel considerations.
- Ability to stand, sit, walk or lift and general skills such as computer and phone skills
- Population to assist? Students, seniors, males, females. Any off limits?
- Do you want groups or one-on-one?
- Do you like to be the leader or the assistant?

Where: Do you have a preference for a particular setting or aspect of the organization?

- In what capacity, role or environment would you like to volunteer?
- Where have you volunteered in the past? (Brief recap from “why” phase)
- Where do you see your volunteer experience leading? To a job? To new friends? (Brief recap)

Recap: Briefly go over the highlights of the person’s likes, dislikes, abilities and limits. Ask if your recap is accurate. Finally, encourage the volunteer to “imagine” their ideal role.

- Ask the volunteer to respond to a question like, “If you are on your way to volunteer and have a smile on your face, what put it there? Where are you going? What are you doing?”
- This is the time to suggest 2-3 possible placements. Describe them to the volunteer, ask for impressions, and receive permission to set up interviews.