

# 10 steps of screening volunteers

---

Screening is a process that helps match people with volunteer positions while improving the quality and safety of the programmes and services offered in communities.

It's an ongoing process performed by an organisation to ensure that volunteers' involvement is meeting the needs of the organisations, the populations they serve and the volunteers themselves.

Screening involves much more than police vetting or criminal record checks. While these checks are valuable screening steps, screening is a comprehensive process that begins long before a volunteer is selected and should be part of the organisation's continuous improvement.

## Benefits

The benefits of screening are:

- » People's skills and experience are better matched to the needs and opportunities of organisations.
- » The quality and safety of volunteer programmes in communities are improved.
- » The risks and liability for people and organisations are reduced.

Screening helps organisations find the right roles for their volunteers. The screening process considers the skills, experience and qualifications needed for a volunteer role. Through the process, organisations learn about the applicant's interests and goals; and the applicant can decide if the organisation is a good fit for them.

At the same time, screening improves the quality and safety of our communities.

## Why is volunteer screening important?

Organisations have moral, legal and ethical responsibilities to the people they reach and the causes they champion. This includes members, clients, employees, and volunteers. Screening is especially important for organisations that work with vulnerable people. Vulnerable people may include children, youth, people with disabilities/ illness and senior adults.

Each volunteer position has its own set of requirements, risks, and benefits. Organisations must decide the appropriate screening for each role. If volunteers are doing work that does not see them interacting with clients, a thorough background check may not be necessary.

It's important to note that screening should be ongoing during a volunteer's involvement. Screening involves ongoing monitoring and quality assurance. This approach benefits the organisation and the volunteer, by ensuring that the volunteer role is meeting the needs and expectations of both.

## Ten Steps of Screening

Screening practices begin when an organisation creates a new position. It is good practice to be clear about what is required to work with the organisation while providing a positive recruitment experience.

Screening is used to select volunteers for specific roles, and as part of continuous improvement within an organisation.

1. **Assessment:** Identify and assess the risks and essential components of each programme and related positions.
2. **Position descriptions:** Write meaningful, complete, and accurate volunteer position descriptions.
3. **Recruitment:** Provide a positive recruitment experience. Advise the volunteer of any recruitment requirements such as screening and vetting, and security checks.
4. **Application Process:** Have accessible, transparent application processes and systems.
5. **Interview:** Have an accessible, welcoming, and inclusive interview. Have a consistent approach to all applicants and keep an accurate record. Apply the principles of the **Privacy Act** and only ask for information relevant to the position.
6. **References:** Have a standard process for carrying out reference checks. You may want to check online information about an applicant e.g. LinkedIn.
7. **Police vetting checks:** Assess the risks associated with the position to decide if a police check is required. The applicant must agree to the check. They can request their own check, or registered organisations can request a check. See: **NZ Police Vetting Service**.
8. **Criminal record check:** If you are a registered third party you can **apply for someone else's criminal record**.
9. **Onboarding:** Clarify the volunteer's role and set expectations including conduct e.g. by signing a volunteer agreement. Have policies and procedures in place to ensure volunteers are welcomed, trained and inducted appropriately.
10. **Monitoring and quality assurance:** Proactively seek feedback from programme participants and clients, and the volunteer. Adjust if required.

## How to assess a volunteer's suitability

It is ultimately up to you to decide if an applicant is suitable for your organisation. By having and using a screening process, you will recruit wisely and maintain trust in your organisation.

See also: Volunteer **Best Practice Guidelines** for advice and resources.