

Volunteer Experience best practices

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Volunteer Recruitment and Onboarding

- Leverage your existing volunteers as mouthpieces: word of mouth is the most effective volunteer recruitment tactic!
- 3/6/9 Month check-in with newly placed volunteers: assess if placement is a good fit, next steps in volunteer “career” progression, succession planning. You don't want to find out a volunteer is unhappy in their new role at the END of their term
- Warm up potential volunteers with small 'micro' opportunities: Simple, concrete tasks such as event registration table, event photographer, membership renewal reminders, etc are a great entry point to volunteering and can lead to deeper engagement and potential future member leadership
- When recruiting potential new volunteers, lean into the WHY: how does this role contribute not only to the organization, but what does it do for THEM?
- Looking for new volunteers? Look for those already most engaged elsewhere! Check out membership reports for those attending the most events, or those posting frequently in the HBA Community. Also, touch base with all new members within the first ~6 months of their membership to ensure they know the value of volunteering as part of their membership.

Day-to-Day Volunteering Tips

- BOOKMARK YOUR TOP TOOLS! Many examples to get you started are listed here! This will make quick access to what you need when you need it super easy
- When getting started on anything HBA-related, log into the HBA website: www.hbanet.org. This will ensure you're logged in across our various platforms so you don't have to deal with complicated redirects, etc.

Application management

- Set aside a chunk of time once every week or two to handle application management. It's easier to do in one fell swoop rather than piecemeal
- Leverage the volunteer reports available to you in your HBA profile (real-time based on data in HBA's main database), but many volunteer leaders also recommend having a component-specific tracking document to keep yourself on task / to remind you of what needs follow up, and capture additional notes about specific volunteers, their goals, etc. This can also be helpful during succession periods to refer to and/or do an annual data cleanup to ensure HBA's records are reflective of yours. We suggest tracking:
 - How many do you have (and how many do you need)
 - How many are returning?
 - How often do they volunteer (if not in a leadership role)?
 - Anyone who hasn't been back?
 - What are the career and volunteer goals of each individual? Their skills/interest?
 - What accomplishments has the person achieved in their role (high-level)?
- Remember: you are NOT responsible for finding people for every role, but you are responsible for managing applications and driving succession planning across teams!

Recognition

- **Recognize volunteers EARLY and OFTEN!** Feeling seen and acknowledged for their efforts is a top retention tactic and is critical to maintaining a healthy volunteer ecosystem within your component.

Exiting Volunteers

- The HBA is a primarily volunteer-run organization, which does mean volunteer turnover is a given! Do not take it personally when a volunteer has to step back - it could be for any number of reasons, said or unsaid, like life changes, feeling underappreciated, role mismatch, etc. When a volunteer exits, do your best to help them leave with grace and dignity: thank them for their service, ask them to complete the HBA's volunteer exit survey, ask them to share a few things the team did well/could have done better to impact their experience, so you can improve, etc, and track if they'd like to come back someday so you can schedule future outreach to them. If the volunteer leaving is in a member leadership role, please also ask them if they've identified potential successors to take over, as is expected of all leaders. If not, assess their willingness to help identify their successor
 - Always ensure your volunteer data is accurate - edit volunteer term dates in the Volunteer Management Module (interim solution) to ensure their term and access ends with their volunteerism does.
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