

Screening Checklist for Potential SHIP Volunteers

Thoroughly screening prospective SHIP volunteers can save you time and money! Use this checklist to guide you through the five-step screening process. You'll experience major results, such as improved volunteer retention, increased volunteer satisfaction, and fewer volunteer management issues!



Step 1: The Initial Conversation

- Explain [SHIP](#) and its mission
- Highlight the importance of SHIP volunteers and the impact they have
- Discuss SHIP [volunteer opportunities](#), the [benefits](#) of volunteering, and any requirements (e.g. training, time commitment, etc.)
- Address any questions or concerns
- Give interested individuals your business card, SHIP brochure, and any volunteer recruitment materials (e.g. [job descriptions](#), [application](#), etc.)
- Record contact information so you can follow-up with prospective applicants
- Follow-up with interested individuals promptly so they don't lose interest!

Notes: _____



Step 2: The Application

- Include questions to gather information about skills and interests, experience, references, availability, contact information, and conflicts of interest
- Review the application with interested individuals and answer any questions
- Offer to help them complete the application
- Read completed applications carefully to learn more about prospective volunteers
- Check to see whether they identified any conflicts of interest
- Consider whether the prospective volunteers could be a good fit for SHIP
- Invite promising applicants for in-person interviews and refer remaining applicants to volunteer opportunities for which they may be better suited

Notes: _____



Step 3: The Interview

- Schedule approximately one hour for each volunteer interview
- Arrange to hold the interviews in a private space
- Decide whether you'll interview the applicants by yourself or as part of a team (e.g. with other staff or volunteers)
- Re-read the completed applications and mark items for follow-up
- Draft a list of [questions](#) to ask each prospective volunteer
- During the interview:
 - Assess applicants' abilities and motivations for volunteering with SHIP
 - Identify any conflicts of interest
 - Listen! Applicants should do most of the talking
- Afterwards, show applicants around and introduce them to volunteers and staff (only if you think might be a good fit)
- Think about whether they could be a good fit for SHIP

Notes: _____



Step 4: The Reference Check

- Draft a list of questions to ask each reference
- Call two personal references or employers listed on each application
 - Consider their opinions as you assess whether the applicants could be a good fit

Notes: _____



Step 5: The Background Check (if applicable)

- Review your agency and SHIP requirements to see whether or not you need to complete background checks
- Choose where you'll get the criminal background checks (e.g. police, FBI, etc.)
- Decide whether to contact your state insurance department to see if applicants are licensed as insurance agents or brokers
- Evaluate the results of the background checks and take those results into consideration as you think about whether the applicants could be a good fit

Notes: _____



Decision Time!

- Call selected finalists and welcome them to SHIP! Then, send them a letter that clearly outlines the next steps (e.g. orientation, training, etc.)
- Call remaining applicants, share your decision, and refer them to other potential volunteer opportunities

Notes: _____

