



Volunteer Management Check-Up

A practical self-assessment for safer, clearer, and more consistent volunteer practices

Volunteers can be essential to a church or nonprofit's mission, but strong volunteer programs require more than goodwill. Clear roles, appropriate screening, training, supervision, safeguards, and offboarding practices help protect volunteers, the people they serve, and the organization.

HOW TO USE THIS CHECK-UP

For each statement, mark Yes, Partially, No, or Not Sure. Focus on patterns rather than a single score. This self-assessment identifies areas that may warrant closer review; it is not a legal opinion or formal compliance audit.

1. Volunteer Program Structure & Role Clarity

Volunteer roles have written descriptions that explain responsibilities, expectations, supervision, and boundaries.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

The organization clearly distinguishes volunteer roles from paid employee and independent contractor roles.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Each volunteer knows who supervises the role and where to go with questions or concerns.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

High-responsibility or sensitive volunteer roles receive additional review before placement.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

2. Recruitment, Application & Screening

The organization uses a consistent process to recruit and select volunteers.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Volunteer applications collect information appropriate to the role and the organization's needs.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

References and/or background screening are used when appropriate to the role, population served, and applicable requirements.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Roles involving children, older adults, finances, transportation, confidential information, or other higher-risk activities receive enhanced screening and safeguards.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

3. Orientation, Training & Expectations

Volunteers receive orientation before beginning service.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Volunteers are trained on role-specific responsibilities, safety expectations, confidentiality, and organizational policies.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Codes of conduct and behavioral expectations are communicated in writing.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Volunteers know how to report accidents, safety concerns, misconduct, harassment, boundary concerns, or suspected abuse.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

4. Supervision, Conduct & Accountability

Volunteer supervisors understand their responsibility to provide direction, feedback, and oversight.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

The organization has a consistent process for addressing volunteer performance or conduct concerns.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Serious incidents and concerns are documented and escalated to the appropriate leader.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Volunteers have a way to raise concerns outside their immediate supervisor when appropriate.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

5. Safety, Confidentiality & Risk Management

Volunteer activities are reviewed for foreseeable safety, privacy, financial, transportation, or safeguarding risks.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Confidential information and system access are limited to what volunteers need for their roles.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Emergency and incident-reporting procedures are communicated to volunteers.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Insurance, waivers, permissions, transportation practices, and other risk controls are reviewed with qualified professionals when relevant.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

6. Engagement, Recognition & Retention

Volunteers receive regular communication and know how their work supports the organization's mission.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

The organization gathers volunteer feedback and addresses recurring concerns.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Volunteer contributions are intentionally recognized and appreciated.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Leaders monitor volunteer workload and avoid relying on volunteers in ways that create unclear or unsustainable expectations.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

7. Separation & Offboarding

The organization has a process for ending a volunteer relationship when expectations, conduct, safety, or organizational needs require it.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Keys, badges, equipment, records, passwords, and system access are recovered or removed promptly when service ends.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Confidentiality and other continuing obligations are reinforced when appropriate.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Significant volunteer incidents or separations are documented and retained appropriately.

☐ Yes ☐ Partially ☐ No ☐ Not Sure

Review Your Results

Pay particular attention to items marked Partially, No, or Not Sure. These responses can point to informal or inconsistent practices, unclear accountability, documentation gaps, or areas that deserve a more detailed review.

Mostly Yes	Many foundational practices appear to be in place. Consider whether they are current, consistently applied, documented, and aligned with your organization's needs.
Several Partially / Not Sure	Some practices may exist but be informal, inconsistent, or unclear. A focused assessment can help establish priorities and determine what should be strengthened.
Several No	Your organization may benefit from building or formalizing core systems, policies, training, safeguards, and accountability practices.

A Practical Next Step

Use your responses to identify gaps in volunteer structure, screening, training, supervision, safety, engagement, and offboarding. The Capstone HR Collective can help assess your volunteer program and develop practical policies, role descriptions, onboarding tools, training, and management practices.

Schedule a consultation: calendly.com/capstonehr

Important: This resource is for educational and informational purposes only. It does not constitute legal advice, a legal opinion, or a comprehensive HR/compliance audit. Requirements vary by jurisdiction and organizational circumstances.