VOLUNTEER INTAKE CALL CHECKLIST

Managing volunteers can sometimes come with its share of challenges, but it's a crucial part of maintaining a sustainable breakfast program. In order to provide support in this process, we have compiled resources to help you meet, train and retain future volunteers.

Below is an outline for an intake call to help you gain and share information with a potential volunteer. Having a productive intake call can help future volunteers feel welcome, inspired, motivated and well supported. This contributes to having a team that is more reliable and potentially in place for longer! The checklist below is a guide—feel free to adapt it to your needs!



VOLUNTEER INTAKE CALL CHECKLIST

1. Opening & Introduction

- ☐ Welcome the volunteer and thank them for their interest
- ☐ Introduce yourself and your role

2. Volunteering Overview

- ☐ Overview of the breakfast program
- ☐ Volunteer role options and descriptions (preparation, service, clean-up)
- ☐ Time commitments for different roles
- ☐ Training and support provided

3. Basic Information Collection

- ☐ Full name and preferred name
- ☐ Contact information (phone, email, address) and preferred method of communication
- ☐ Confirm that distance won't be an issue
- ☐ How they heard about the opportunity
- ☐ Previous volunteer experience and any special skills they can integrate
- ☐ Why they want to volunteer and what they hope to gain from the experience Parking and
- ☐ Facility access information
- ☐ Ask if they have any questions about the volunteer role

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4. Availability & Commitment

- ☐ Days of the week available
- ☐ Time of day available
- ☐ Frequency of volunteering (weekly, monthly, etc.)
- ☐ Duration of commitment they're considering (occasionally, for a few weeks, or for the entire school year)
- ☐ Are there any physical limitations or accessibility needs to be aware of?
- ☐ Confirm when they are available to start

5. Background & Requirements

- ☐ Discuss background check requirements and set date and time to come in and complete it – Remind them to bring government-issued ID
- ☐ Reference requirements (if applicable)

6. Expectations & Policies

- ☐ Attendance and reliability expectations
- ☐ Communication protocols: information will be provided about how to communicate with the school or program leader if they will be late or absent. Request that this be communicated as much in advance as possible because the school relies heavily on volunteers to be able to serve breakfast.
- ☐ Dress code (comfortable clothing, school will provide apron, hair nets, etc.)
- ☐ Parking and facility access information
- ☐ Share the school's Code of Ethics
- ☐ Ask if they have any questions about the volunteer role

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7. Next Steps

- ☐ Explain the application/approval process (if applicable)
- ☐ Mention there will be a follow-up email with all relevant information and a health & hygiene video to watch before their first day (see Appendix 1)
- ☐ Schedule date and time to come in for background check
- ☐ Schedule date and time of orientation session (if applicable)
- ☐ Schedule date and time of first day
- ☐ Share who their main point of contact will be and how/when they will connect

8. Follow-Up Actions

- ☐ Send follow-up email
- ☐ Process background check
- ☐ Contact references (if applicable)
- ☐ Add to volunteer communication lists
- ☐ Set calendar reminder for check-in after first volunteer experience

APPENDIX 1

VOLUNTEER INTAKE FOLLOW-UP EMAIL TEMPLATE

(Please adapt as needed!)

Subject: Welcome to [School Name]'s Breakfast Program – Next Steps for Your Volunteer Journey

Dear [Volunteer Name],

Thank you so much for taking the time to speak with me today about volunteering with our Breakfast Program. It was wonderful to hear about your interest in our school. Your enthusiasm and commitment will be valuable to our volunteer team.

NEXT STEPS

1. **Background Check:**

   As discussed, we'll need to process a background check before you begin volunteering.

   - **Date:** [Date]
   - **Time:** [Time]
   - **Location:** [Address]
   - **What to bring:** Photo ID and completed application form

2. **Required Training:**

   Before your first volunteer shift, please watch our 5-minute health & hygiene training video.

3. **Orientation Session:**

   Your in-person orientation is scheduled for:

   - **Date: [**Date]
   - **Time:** [Time]
   - **Location:** [Address]

4. **First Volunteer Assignment:**

   We're excited to have you start in the [specific role/program] on [date]. [Contact person] will reach out to you by [date] to coordinate your first shift and answer any role-specific questions.

IMPORTANT RESOURCES

- **Parking Information:** [Details or link]
- **School Contact:** [Name and phone number]
- **Questions?** Feel free to reach out to me at [email] or [phone number

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(Please adapt as needed!)

WHAT'S NEXT

Thank you again for choosing to volunteer with our school breakfast program. Your commitment makes a real difference in our community, and we're thrilled to have you join our team.

Looking forward to working with you!

Warm regards,
[Email signature]

P.S. Follow us on [social media platforms] to stay updated on our work and see the impact volunteers like you are making!

This email was sent to [volunteer email] following your volunteer intake call on [date]. If you have any questions or need to make changes to your volunteer commitment, please contact us as soon as possible.

