

Hospitality

ONBOARDING PROCESS



Onboarding Process Checklist

→ Relationally connect with potential volunteer or Recieve Dream Team Questionnaire

- Ensure new volunteer fills out the **Dream Team Questionnaire** / serve.mybayside.church

→ Start PCO Workflow Process

- Check for any Restrictions on Serving
 - Go to the individual's profile and under the custom tab open "Restrictions"
 - Check to see if there is a comment in the "Serving at Bayside: Special Considerations" section
 - If there is a "Special Consideration, please follow protocol described in PCO
- Internal Review in PCO
 - Go to "Activity" tab on individual's profile
 - Read DTQ to learn more about the individual
 - Look to see if they indicated multiple serving activities. If so, contact the other ministry leaders and figure out how you will coordinate communication to make it as streamlined as possible for the person
- Discovery Conversation (PCO Formal Interview)
 - Phone call or in person conversation
 - Hear their story
 - What brought them to Bayside?
 - Why did they choose Hospitality?
 - Where have they served before?

- What did they like about where they served?
- What did they dislike about where they served?
- Verify My Bayside Completion (They do **NOT** have to have this completed to serve (with the exception of Safety & eCare) but encourage them to attend Growth Track if they have not)
- Schedule Orientation & Training

→ **Coordinate Orientation & Training**

- Schedule who will do orientation (yourself, coach, trainer)
- Notify Team Leader that they have a new volunteer so that they can connect with and introduce themselves prior to orientation
- Coordinate w/Team Leader on Shadow Training (who will they shadow?)
- Email Training Video to New Volunteer and set expectation for Training Videos to be viewed prior to Orientation
- New Volunteer Package provided to Volunteer: t-shirt, training guide, and scan tag

→ **Add Volunteer to PCO Services**

- Verify they have received an invitation from PCO Services

→ **Orientation / First Time Serving**

- Step One - RELATIONALLY CONNECT - The goal of the orientation is to hear more of their story and make a personal connection.
 - See example questions listed under “Discovery Conversation”
 - How did they come to know Jesus?
 - What do they like to do for fun?
- Step Two - Cast Vision of why Hospitality matters and the value they are adding to the church by serving - help them realize their importance and encourage ownership - share stories and examples on how to create an environment where people want to come back

- Step Three - Do they have any questions about the video training?
- Step Four - Go over the written Training Guide, spend more time on the areas that are not included in the training video especially those specific to your campus, including fill in the blank areas
- Step Five - Introduce them to their Shadow Trainer (this should be a high level and relational volunteer)
 - Safety/eCare - Raptor Scan prior to shadow training

→ **Follow up** (Celebrate Them!)

- Phone call (not email) at the beginning of the following week to thank them, find out how they liked serving and if they have any questions
- Make sure they understand Planning Center and remind them of when they are next scheduled and make sure they know who will be communicating with them moving forward

→ **Continue PCO Workflow Process**

- 2 Month Check In (Suggestions: Gift Card, Thank You Card)
- 6 Month Check In (Suggestions: Thank You Card, Phone Call, Coffee)
- Are They Growing? Have they taken their next step in the Growth Track (Suggestions: Phone Call, Lunch, Coffee)
- Annual Volunteer Review (Suggestions: Gift Card, Lunch)

→ **After the Annual Volunteer Review, Keep your Volunteers in a Workflow rather than marking “Completed”.**

- Snooze their Workflow for 6 months (or however long you choose) so that you can continue to celebrate and schedule meetings with them
- This is also a great way to set reminders for background checks