

Improving the Volunteer Onboarding Process



UX Research Summary

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Summary of Key Findings: **the Good News**

- For the most part, the onboarding for volunteers and PMs / teams is going well
- **Volunteer feedback:**
 - **Meetup & Slack** onboarding instructions are clear and effective
 - HfLA - by reputation and in practice - is much better and more organized than other volunteer orgs
 - The website is seen as 'user-friendly,' has clear project descriptions, is visually appealing, and people enjoy the animations
 - Onboarding leaders give a good impression of the org

"There is clearly a lot of devotion and dedication from the people involved"

"Bonnie is a great front-person for HfLA, she has a kind and generous energy... She makes it feel like a safe space for new people."



Summary of Key Findings: **the Good News**

- **PM feedback:**
 - Onboarding process so far has been “smooth”
 - Bonnie reliably fills open roles well after discussing at meetings
 - New volunteers are usually effective, ‘good to go’
 - Appreciate guides, shared resources

“Onboarding new people has been smooth”

“I’m really impressed with Bonnie”

“HfLA is unusually organized”





Finding 1: Volunteers and PMs like the project card 'Looking for' functionality (when up to date)

“We recently realized we need to keep the roles on the site updated”

Several current PM's found their roles by filtering the project cards 'looking for'



Finding 1: Volunteers and PMs like the project card 'Looking for' functionality (when up to date)

Category	Finding	Recommendations	Priority	Effort to implement
Project Cards	The project card "looking for" functionality and filter is helpful when up to date- It shouldn't be removed.	Make "looking for" section in project cards prominent	Medium	Medium
		Recruit an overall HfLA PM to facilitate updating roles	Medium	Medium
		Prompt PMs to update roles - part of PM documentation / Community of Practice	Medium	Medium
		Add more urgency to roles project card updates	Medium	Medium
		Add filter tags	Medium	Medium



Finding 2: Volunteers would like more information and clarity prior to zoom onboarding

“I felt like I should have explored the projects before [onboarding]”

When I first signed up, there wasn't an email clearly labeled: Hack for LA: welcome to the team”



Finding 2: Volunteers would like more info and clarity prior to zoom onboarding

Category	Finding	Recommendations	Priority	Effort to implement
Pre-Onboard Info	Meetup email confirmation & link gets lost in inbox	Add "Hack for LA: __" to beginning of Meetup event titles	Medium	Low
	Volunteers felt they should have been prompted to review the projects before	Add a link to review HfLA projects in Meetup event and/or Getting Started pages (before onboarding step)	Medium	Low
	Volunteers wanted more details in the onboarding email confirmation	Include slack self-invite, meeting details, projects, etc in email. If not possible via Meetup- make slack self-invite more prominent and include details in slackbot	Medium	Medium



Finding 3: Several volunteers and PMs want role descriptions and requirements on the site

PM: "It would be helpful if requirements for a specific role were listed"

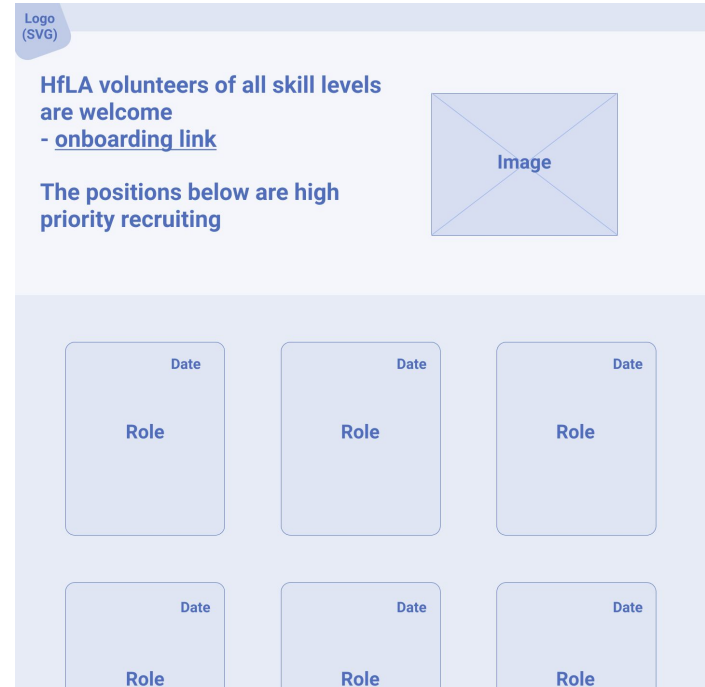
Volunteer: "I would have liked an overview of what each role does"



Finding 3: Several volunteers and PMs want role descriptions and requirements on the site

Recommendations:

- Page with role listings- each one leads to a separate page (md file)
 - Can be linked to directly when teams recruit
- Listed by date posted, with date “as of” (listings can be bumped if not filled)
- This page will include the more time- sensitive and/or specialized listings. Description above will include disclaimer that all volunteer skill levels are welcome, and they should attend onboarding
- Instructions about how to apply/who to contact for roles





Finding 4: Volunteers want a more organized zoom onboarding

PM: "It would be helpful if requirements for a specific role were listed"

Volunteer: "I would have liked an overview of what each role does"



Finding 4: Volunteers want a more organized zoom onboarding

Category	Finding (They want...)	Recommendations	Priority	Effort to implement
Onboard Zoom	Agenda at start for order, and “so that we’re not waiting to see what happens”	List out an agenda at start of onboarding	Medium	Low
	Slideshow (“right now it’s all verbal”)	Add slideshow with main points, action steps	Medium	Medium
	Shorter meeting (about an hour)	Communities of Practice may help	Medium	Medium
	Clear actionable steps, and fewer details	More concise - “here's how to find a project, here's who to contact, etc.”	Medium	Medium



Website: Feedback & Ideas

Category	Finding (They want...)	Recommendations	Priority	Effort to implement
Website	Video explaining HfLA/ CfA	Move from Events page to Home or About	Medium	Low
	Real impact of completed projects- effect on people	Add to homepage	Medium	Medium
	Unclear if inexperienced volunteers are welcome		Low	Medium
	Didn't understand scope of HfLA- only at onboarding	About page may help, plus more info on homepage	Medium	Medium
	Thought projects not looking for people because so many contributors on their pages	Change to "All-Time Contributors"	Low	N/A



Github: Feedback

Category	Finding	Recommendations	Priority	Effort to implement
Github	Many completely unfamiliar w/ Github at first- intimidating	N/A	N/A	N/A
	Character limit in Github roles board	Should add a note about this in left column	Medium	Medium
	Need to be invited to post in Github roles board (but simple process- Olivia accepted asap)	(Fixed- all PM's invited to board)	Medium	Medium



Slack: Feedback & Ideas

- PM's
 - Slack onboarding instructions are especially helpful
 - PM's message roles they need to fill in a designated slack channel
 - Pros:
 - Alerts everyone when there's a new listing
 - So HfLA site team know when to add a new listing to site
 - Boosts listing to 3k members
 - Several PMs find Slack very intuitive
 - However one prefers Github
 - Cons:
 - Disappears after 2 weeks
 - Disorganized (can't replace Github option)
 - Message Slackbot when "need new dev"



Community of Practice: **Feedback & Ideas**

- Learn agile, incremental change
- Assigning issues- first assign an “easy win”
- Quiz Idea to test abilities
 - Can take multiple times
 - Design Lead: “I would be intimidated”



Additional Noteworthy Feedback: **PM's**

- Hesitate with removing listings- “It’s a volunteer organization. If someone is really passionate about the project, we can make room”
- Like idea of having pool of volunteers (options) to review before they join
- Volunteers need to be placed in a position/project with skills they want to develop
- PM's generally don't know they need someone until they're in a desperate situation
 - Recommendation: train PM's fully about recruiting continually and training up
- Issue with multiple PM's: spreads responsibility, no one takes full ownership
- PM's sometimes don't think recruitment is their problem- but it's part of team forming
- “PM's need more training”