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Volunteer Intake and Role Assignment Template

An intake form that collects only the minimum data, with the reason for each question, plus a role-matching worksheet and an orientation and supervision plan.

For: For the volunteer coordinator of an association or initiative who wants to welcome people respectfully and put each person in a role that fits, without collecting data they do not need.

Level: Beginner Version 1.0 · 2026-09-21

Why does intake deserve its own template?

The moment someone offers to volunteer is a moment of trust. Meet it with a long form that asks about everything, then weeks of silence, then a role unlike what they came for, and you will usually lose them, along with what they would have told their friends about you. Meet it with chaos, and the shy volunteer ends up at reception while the skilled organiser carries boxes.

This template covers four stages: a short **intake form** that collects only what you need, a **matching worksheet** that puts people in the right role, an **orientation session** where volunteers learn what is expected and what their rights are, and **supervision** that gives each one a clear point of contact.

The minimum-data principle

Every piece of information you collect about a person is a responsibility: you must store it, protect it and delete it when you no longer need it. The rule is simple: **do not ask for anything you cannot explain you need for this specific role.**

Do not ask about religion, sect, political affiliation, health, ID or passport numbers, income or marital status, and do not request a personal photo on the form. Role assignment does not need this sensitive information, and collecting it can make people feel judged or expose them to harm if it leaks.

If a role has a specific requirement, such as a driving licence for a driver, look at the document yourself and record "verified" with the date. Do not copy its number or photograph it. Instead of asking about health, describe the physical demands of each role clearly (standing for hours, lifting, working in the sun) and let volunteers choose for themselves.

What we collect and why

Field	Why we need it	Note
The name they like to be called	To communicate and get to know each other	No need for a full legal name at intake
One preferred contact method	To share times and changes	Phone or email, not both unless they want
Are you 18 or older? (yes/no)	Minors need guardian consent and suitable roles	No need for a date of birth
General area (neighbourhood or town)	To judge travel and organise transport	No need for a full address
Availability	To build a realistic schedule	Days, times, and hours per month
Skills and experience	To match them to a role	Open questions or options
Interests: what would you like to do?	Motivation keeps people coming back	May differ from skills, and that is fine
Languages	For communication and documentation roles	Optional
Tasks you would rather not do	To avoid a role that makes them quit	Optional
Consent to data use	So they know how data is used and kept	Required, in plain language

When do we collect an emergency contact? Only for field activities, and only once a volunteer confirms they are joining a specific activity, not at general intake. Delete it after the activity.

Where is data kept, who sees it, and when is it deleted?

- In one place (a file or tool) with access limited to the volunteer coordinator and their deputy.
- Do not publish names or numbers in large group chats; use broadcast lists or add people individually.
- Review the list yearly: anyone who has not taken part or been in touch is asked whether they want to stay; otherwise their data is deleted.
- Volunteers can ask to correct or delete their data at any time, and the request is honoured without asking why.
- Check what applicable local law requires for personal data, and treat this template as a practical starting point, not legal advice.

The four stages

1. **Intake (within a week of applying).** A short form, then a personal reply within a week thanking the volunteer and telling them the next step and when. Long silence is the first reason new volunteers drift away.
2. **A short getting-to-know-you chat (15 minutes).** A call or meeting to understand what the person wants and explain the available roles. Not a job interview: the aim is for both sides to choose.

3. **Matching.** Using the worksheet below, give a role to someone whose skill or interest overlaps with the time they have. Offer the role to the volunteer to accept or ask for another.
4. **Orientation.** Before the first activity: who we are, the initiative's aim, what the role involves, the code of conduct, safeguarding rules if children or vulnerable groups are involved, who to go to, and how to cancel if they cannot come.
5. **Supervision and follow-up.** Every volunteer has a named supervisor. A short check-in after the first activity: how did it go, what do you need? Then follow-up each month or each phase.

Intake form (template)

Volunteer intake form

Volunteer form — [association / initiative name]

Thank you for wanting to volunteer with us. We only ask what we need to find you a good role.

- 1) The name you would like us to call you: [...]
- 2) Your preferred contact method: [phone / email] — [...]
- 3) Are you 18 or older? [yes] [no — we will contact your guardian for consent]
- 4) Where you live (neighbourhood or town only): [...]
- 5) When you are available:
Days: ☐ weekdays ☐ weekends
Time: ☐ morning ☐ afternoon ☐ evening
Roughly how many hours a month? [...]
- 6) Which skills or experience would you like to offer?
☐ organising ☐ talking with people ☐ photography ☐ design
☐ writing ☐ teaching and mentoring ☐ field work ☐ other: [...]
- 7) What would you like to do or learn while volunteering? [...]
- 8) Languages you speak (optional): [...]
- 9) Any tasks you would rather not do? (optional): [...]

How we use your data:

We use this information only to organise volunteering and contact you. Only the volunteer coordinator and their deputy can see it. We do not share it with anyone else. You can ask us to correct or delete it at any time via [contact]. We review the list yearly and delete data for people no longer taking part.

☐ I agree to my data being used as described above.

Date: [...]

Role-matching worksheet

Start by describing each role in one row: the task, the hours, the skill or readiness needed, and any physical demands. Then add candidate volunteers and rate the fit with three simple marks: good fit, possible with training, not a fit for now.

Role	Time needed	Skill or readiness	Physical demands	Candidate	Fit	Decision
[..]	[..]	[..]	[..]	[..]	[good / with training / no]	[..]
[..]	[..]	[..]	[..]	[..]	[good / with training / no]	[..]
[..]	[..]	[..]	[..]	[..]	[good / with training / no]	[..]

Orientation session outline (60 minutes)

- **10 minutes:** introductions, the association and the initiative's aim.
- **15 minutes:** the roles: what each involves and who supervises it.
- **15 minutes:** code of conduct, safeguarding and safety rules, and what may and may not be photographed or posted.
- **10 minutes:** practicalities: times, how to cancel, who to contact about a problem.
- **10 minutes:** volunteers' questions.

Worksheet

Review your current form: which questions can you not explain the need for? Strike them here.

Which roles does your current initiative have? Describe each in one line with its time and demands.

Where will data be kept? Who can see it? When is it reviewed and deleted?

Who supervises each group of volunteers, and how will they follow up after the first activity?

Within how many days will every applicant get a first reply, and who sends it?

Completed example

Illustrative example

Context: North Wave Environmental Association (جمعية موج الشمال البيئية), a small association in Tripoli, is organising a public beach clean-up followed by four awareness sessions in nearby schools. 34 people applied through a short online form. Coordinator: Rana. Deputy: Tarek.

What the association removed from its old form

The old form asked for full date of birth, address, ID number, health condition, occupation and social media accounts. After review, all of these were removed. Date of birth became "Are you 18 or older?", address became general area, and the health question was replaced by a description of each role's demands. Skills and interests stayed.

Roles

- **Field clean-up team:** Saturday morning, 4 hours, standing and walking on sand, carrying light bags, in the sun.
- **Reception and sign-in on the day:** 4 hours seated under a shade, talking with people.
- **Documentation:** photographing the clean-up without showing the faces of children or passers-by unless they consent, 4 hours.
- **School session facilitators:** four weekday-morning sessions of 90 minutes each, with prior training.

Part of the matching worksheet

Volunteer	Availability	Skill / interest	Proposed role	Decision
Lea (under 18)	Saturday	Enjoys photography	Documentation	Good fit after guardian consent, working alongside Tarek
Hassan	Weekday mornings	Retired teacher, likes talking with children	School session facilitator	Good fit
Maya	Saturday	Organising; prefers not to work in the sun	Reception and sign-in	Good fit
Youssef	Saturday	Wants field work	Field clean-up	Good fit
Ghina	Evenings only	Design	No evening role in this campaign	Offered remote design of the awareness post, or kept for the next campaign

Supervision

Rana supervises the clean-up and reception teams; Tarek supervises documentation and the school sessions. After the clean-up, Rana sent every volunteer a thank-you message with two questions: what did you enjoy, and what should we improve? Emergency contacts were collected from field participants on the day only and deleted a week later.

Common mistakes

- **Mistake:** a form asking about religion, sect, health or ID number. **Fix:** delete every question you cannot link to a specific role.
- **Mistake:** weeks of silence after someone applies. **Fix:** a personal reply within a week, even if it says "nothing now, we will be in touch on [date]".
- **Mistake:** assigning roles by who arrived first. **Fix:** a matching worksheet that crosses skill, interest and time.
- **Mistake:** putting volunteers' numbers in one big group chat. **Fix:** broadcast lists or small role-based groups, after telling them.
- **Mistake:** a volunteer who does not know who to go to. **Fix:** a named supervisor for every volunteer from orientation onwards.
- **Mistake:** involving minors without guardian consent. **Fix:** a yes/no age question, written consent, and suitable roles with an accompanying adult.
- **Mistake:** keeping data forever. **Fix:** a yearly review and deletion for people no longer taking part.

Completion checklist

- ☐ Every form question has a written reason linked to role assignment.
- ☐ No questions on religion, sect, politics, health, ID numbers or income.

- ☐ Age is asked only as 18-or-older, with a guardian-consent route.
- ☐ A clear statement on data use, storage and deletion, with a consent box.
- ☐ Data sits in one place with limited access.
- ☐ Every applicant gets a first reply within a week.
- ☐ Every role is described with time, skill and physical demands.
- ☐ The matching worksheet is complete and each role is offered for the volunteer to accept.
- ☐ Orientation covers the code of conduct, safeguarding and photography rules.
- ☐ Every volunteer has a named supervisor.
- ☐ Emergency contacts are collected for field activities only and deleted afterwards.
- ☐ The yearly list review date is set.

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