

ORIENTATION AND TRAINING

“The only thing worse than having no volunteers is having untrained or poorly trained volunteers.”

-Anonymous

Websites

www.nationalserviceresources.org/
www.energizeinc.com/art/train.html

Books– all accessible from State Libraries

Sue Vineyard, *The Great Trainer's Guide– How to Train (Almost) Anyone to do (Almost) Anything*, 1995.

Vineyard and McCurley, *Best practices for Volunteer Programs*, 2001.

McCurley and Lynch, *Volunteer Management: Mobilizing all the Resources of the Community*, 1996.

McCurley and Lynch, *Essential Volunteer Management*, 1989.

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DELAWARE HEALTH AND SOCIAL SERVICES
Division of State Service Centers State Office of Volunteerism
Governor's Commission on Community and Volunteer Service

INTRODUCTION TO SECTION

You can just imagine the damage that a well meaning but naïve volunteer might do to your organization of not properly oriented and trained. Thus, the importance of a well-designed training program for your volunteers cannot be overstated. It is essential to communicate very specifically what it is that you want your volunteers to do as well as what not to do. There are several types of training as well as a number of basic areas that all successful training programs address. Paying careful attention to the best methods as well as various content areas will insure that your volunteers have both the background and the preparation they need to perform not only well but happily. It will indeed fuel a cycle of success for your organization as well as improve volunteer retention while attracting new supporters who also seek success and satisfaction.

FACT SHEET: DESIGNING EFFECTIVE VOLUNTEER POSITIONS

Well-designed volunteer positions ensure that volunteer programs contribute to the achievement of their organization's goals. A plan for involving volunteers allows volunteer programs to recruit from the pool of volunteers available in the community and to engage them in ways that effectively utilize their skills. Designing volunteer positions also plays a role in the strategic planning process of the volunteer program as well as the overall organization. Once designed, periodic reviews of volunteer positions and tasks help volunteer program planners make volunteer roles more effective and mission-oriented.

Turning the knowledge gained from developing volunteer positions into written volunteer position descriptions can also simplify some of the most challenging aspects of a volunteer coordinator's job- marketing, recruiting, screening, and training volunteers. Position descriptions can serve as a tool for recruiting people with the right interests, skills, and availability, and matching those individuals successfully with volunteer positions. Position descriptions make clear the volunteer's responsibilities to everyone staff, volunteers, and volunteer coordinators- which simplifies supervision and clears away many areas of potential conflict.

Position Description Form Tips:

- View the volunteer position from the perspective of the volunteer.
- Is the program targeting the position towards potential long-term volunteers or episodic volunteers?
- Is the position meant to take advantage of the skills of a professional volunteer?
- Is it asking for multiple volunteers with varying experience that the program will train? Is the training component clearly offered?
- Will the position directly meet a need within the community?
- Will the position clearly support the work of the staff of the organization?
- What aspects of the position will most appeal to the selected volunteer pool:
episodic, student, senior, etc?



- Are the benefits displayed prominently within the position description in order to enhance its attractiveness to potential volunteers?

Using Position Descriptions

The volunteer screening process is strengthened by well-written volunteer position descriptions. Early in the volunteer intake process, volunteers can use volunteer position descriptions to screen themselves by applying only for those positions for which they have the skills and interest. A position description can also be a useful tool in the volunteer interview process. Volunteer Coordinators can easily prepare interview questions for each volunteer position because they have explored the needs of the organization and have outlined the major skills needed for each volunteer position. Having a ready list of interview questions for each volunteer position simplifies future interviews.

In the interview a volunteer coordinator will look for the applicant's

- Interests.
- Constraints, when relevant-for example, afraid of heights.
- Working style-for example, relative to supervisor, other staff, and other volunteers.
- Expectations.

When looking at this list, observe how the position description actually helps in the interview process. Before a volunteer even walks into the office, a well-written position

description will have targeted volunteers most interested in the position to be filled, will have explained requirements which would help volunteers self-select themselves away from constraints, would have explained both supervision and evaluation requirements, and would have helped shape the volunteers expectations in terms of the purpose and benefits of the volunteer positions.

Volunteer Position Description Worksheet

Title/Position: _____

Goal of Position: _____

Sample Tasks/Activities: _____

Timeframe: _____

Length of commitment: _____

Estimated hours/month: _____

Scheduling:

- at discretion of volunteer
- at specified times:

Worksite: _____

Qualifications sought: _____

Training required: _____

Benefits: _____

Supervised by: _____

Name: _____

Title: _____

Phone: _____

Drafted by: _____

Date: _____



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Volunteer Management Quick Tips- The Value of Good Instructions

by Susan J. Ellis, President, Energize, Inc.

Try something that is very basic, simple, and effective – and that is worth sharing with everyone once in a while: make use of *instruction sheets* -- a simple list of steps to follow for a task, along with pertinent information that might be needed as the task is done.

An instruction sheet does not replace oral directions or physically walking someone through an activity. But it's vital as a follow-up to such training, reminding everyone of the details.

It's also really useful for anyone who has done the task before but might need a refresher about the details. Besides, some things may have changed since the last time the task was done and it's easy to forget to update everyone.

- The more tiny steps a task involves, the more an instruction sheet is needed. This also removes pressure from the leader of the activity who no longer has to remember to include every single detail in an oral presentation.
- Writing an instruction sheet requires organizers to think through all the steps of an activity and anticipate the possible questions that might arise. So, in and of itself, the sheet has value. It becomes the template from which to give oral instructions and it is a security blanket for each volunteer. Most important, it is an effective way to help everyone do the job right.

Instruction sheets are most necessary when you have many people doing a job that must be done in a consistent way. You can give each volunteer a copy, but it usually helps to tape several along the worktables or on the walls, or to laminate a few to have around.

Think about where an instruction sheet might be helpful even for everyday activities. For example, would a short list of instructions by the telephone help everyone remember how to use the system for internal and external calls? How about a checklist (which is really another type of instruction sheet) for each person who runs a volunteer orientation session, to make sure everything is covered?

About the Author: Susan J. Ellis is president of Energize, Inc. (<http://www.energizeinc.com>), an international training, consulting, and publishing firm specializing in volunteerism. Susan writes the "Tip of the Month" for the free Volunteer Management Online Update, e-mailed monthly upon request. These tips are not published elsewhere and this "Quick Tip" selection has been excerpted from Updates distributed between 2000 and 2005.

VOLUNTEER ORIENTATION CHECKLIST

Based on "Focus on Volunteering" from www.energizeinc.com

Orientation is an important first step in helping both employees and volunteers feel welcome in a new work environment. Consider the following checklist of possible subjects or activities to include in an orientation. Some may need to be conveyed orally, others can be handled with written materials.

- ◇ Give tour of the facility, including areas available to the volunteer such as a cafeteria, lounge, restrooms, coat closet, etc.
- ◇ Introduce key staff members and administrators. Show chain of command and organizations chart, if possible,
- ◇ Give brief history of the agency, its mission, and services provided.
- ◇ Describe clients served.
- ◇ Explain funding sources.
- ◇ Go over the roles of other volunteers.
- ◇ Stress the meaning and importance of confidentiality.
- ◇ Show designated place to work.
- ◇ Show designated place to receive mail, store papers, etc...
- ◇ Detail procedures for signing in, expense reimbursement, and other required forms and reports.
- ◇ Demonstrate how to use telephone system and procedures for making long-distance calls, if necessary.
- ◇ Demonstrate use of other equipment the volunteer is likely to use: copying and fax machines, postage meters, computers, etc...
- ◇ Give (and get) emergency numbers
- ◇ Clarify who to call/ what to do if a volunteer cannot come in on a scheduled day.
- ◇ Discuss background on specific project on which the volunteer will work.
- ◇ Describe reporting procedures: how often and in what form.
- ◇ Share staff schedules and who and how to reach people.
- ◇ Give glossary of terms and abbreviations commonly used in agency.
- ◇ Encourage feedback and explain how and when to voice criticism, offer praise, or make suggestions effectively.

STEPS TO TRAIN VOLUNTEERS

1. IDENTIFY TRAINING NEEDS

KNOWLEDGE

SKILLS

ATTITUDE

2. DESIGN TRAINING

BUILD ON PARTICIPANTS' EXPERIENCE

MAKE TRAINING INTERACTIVE

COMMUNICATE THROUGH VARIOUS MODES

APPLY LEARNING

3. DELIVER TRAINING

	Things to Keep in Mind...	Options...
Where		
When		
Who		
How		

4. ASSESS AND REFINE TRAINING

-POSSIBLE EVALUATION METHODS:

***WRITTEN EVALUATION**

***REFLECTION EXERCISE AT THE END**

***PARTICIPANT CHECK-IN INTERVIEW**

***PARTICIPANT PERFORMANCE IN VOLUNTEER POSITION**

****taken from Points of Light Training– August 2002**

VOLUNTEER TRAINING WORKSHEET

1. Who are the individuals or groups receiving the training? What level of experience do they have in the area of this volunteer assignment?

2. What information, experience and attitudes do you want your volunteers to gain from the training?

Information might include knowledge about the position and the recipients of the service, project details, knowledge of the system.

Experience may include role-play activities, or practice doing something such as developing an action plan or operating equipment needed for the job.

Attitudes may include a sense of ability to effectively do the job and a clear sense of purpose and direction.

3. In what order should the above information be presented so it is easily understood and useful to the recipient?

4. What are the available formats for delivery of training?

Self-study

- ☐ Videotape
- ☐ Book/manual
- ☐ Magazine/newsletter

One-on-one assistance

- ☐ Telephone technical assistance
- ☐ Mentor/buddy system
- ☐ Assigned staff

Training event/workshop

- ☐ Group discussion
- ☐ Role-play
- ☐ Lecture
- ☐ Exercise
- ☐ Worksheet development

5. Who should be involved in designing and/or delivering the training?
Consider those who have facilitative skills, technical knowledge and experience, coworkers, and those with the ability to build credibility and positive relationships.

6. Who should be involved and/or informed of this training?

- ☐ Supervisors
- ☐ Co-workers
- ☐ Clients
- ☐ Other: