Volunteer Orientation: WHAT DO YOU DO AFTER YOU SAY HELLO?

By Loretta Gutierrez Nestor and Carol Neckar

The knowledge and skills of every paid and volunteer staff member play an important part in determining the quality of your agency's services provided to the community and its effectiveness. They are also critical in determining how satisfied volunteers will be in the organization.

The purpose of orientation is to acquaint the volunteer with the agency, his or her service, and job. Orientation should be an ongoing process, not a one-time event. It enables the volunteer to become comfortable with his or her surroundings and to become a part of the organizational family. It differs from training, which is designed to develop skills, knowledge and attitudes to accomplish specific tasks or functions.

Loretta Gutierrez Nestor is the national director of volunteers (representing 1.2 million volunteers nationwide) of the American Red Cross in Washington, D.C. She presented this article as a workshop with Andrew Foster at the National VOLUNTEER Conference in San Diego in June 1990.

Carol Neckar is director of volunteers at Shady Grove Hospital in Rockville, Maryland. She is a volunteer consultant for Red Cross and authored the first version of New Paid and Volunteer Staff Orientation Presenter's Guidebook (ARC 2477), *American Red Cross, from which much of the material in this article was adapted, with permission.*

Planning and Organizing

It is important to develop orientations that meet the needs of *both* the organization and volunteer. What the volunteer wants to know should be of utmost importance in planning and organizing orientation activities. Project volunteers, direct-service volunteers, management volunteers, and board or advisory volunteers have different expectations and needs that must be taken into account.

Because of the importance and far-reaching effects of orientation, it is helpful to develop a committee whose purpose is to determine the types of orientation activities that should be provided to the various groups of volunteers. The committee should consider and make necessary recommendations regarding the budget needed to carry out this function. Usually this type of committee is coordinated by the volunteer office (administrator); its membership includes representatives from the various agency services, thus ensuring necessary input to the committee.

Types of Orientation

There are three types or levels of orientation:

- Orientation to the organization
- Orientation to the service
- Orientation to the job

1. Orientation to the organization. Orientation should cover the following:

- The broad, general scope of the organization including the mission statement, principles, values, history and services of the organization
- The roles, relationships and structure of all levels of the organization including international, national, regional and local units
- The voluntary nature of the organization and relationships between paid and volunteer staff
- General policies, procedures and benefits that apply to volunteer staff
- Growth opportunities for volunteers
- Commitment to cultural diversity

Initial orientation to the organization should be done before volunteers begin service. It may be done at one session or in stages; and it may be done with groups of both paid and volunteer staff or individually. Orientation may be incorporated into other training for some volunteers. No matter how it is conducted, it should be well-planned and not left to happenstance.

Finding answers to the questions how, when, where and by whom requires true creativity and flexibility in designing orientations. The committee or individual responsible for orientation must evaluate and balance carefully the demands placed on individual volunteers and the organization, and yet produce interesting, educational orientations that provide the organization with well-informed volunteer team members and the volunteer with a feeling of belonging, of being in partnership with the organization.

Information regarding new changes and issues in the organization is part of the ongoing orientation process, and various methods of keeping volunteers in-

formed should be considered. Some of the ways to keep volunteers updated include letters, memos, bulletin boards, staff meetings and other gatherings. Exchanging information with other local units and national headquarters or with other organizations may uncover some new ways of providing orientation.

2. Orientation to the service. Orientation to the specific service and job is usually the responsibility of the service or department in which the volunteer is placed. The volunteer office (administrator) has responsibility for providing these functions to volunteers, as well as overall responsibility for ensuring that volunteers receive service and job orientation from the services.

Service induction should cover the following:

- The purposes, goals, procedures of the service and knowledge essential to carrying out its responsibilities
- The importance of the service and its contributions to the organization
- The basic values underlying the work of the service
- The service's interdependence with other parts of the organization and its relationships with other groups and organizations

3. Orientation to the job. Job induction should include information on the following:

- Specific responsibilities, expectations and benefits of the job
- Level of authority and accountability involved
- Tools and resources available
- Supervisor(s), peers, staff to be supervised and support system
- Working conditions
- Methods of reporting and communicating
- System of performance appraisal, job and career development opportunities

Management Support for Orientation

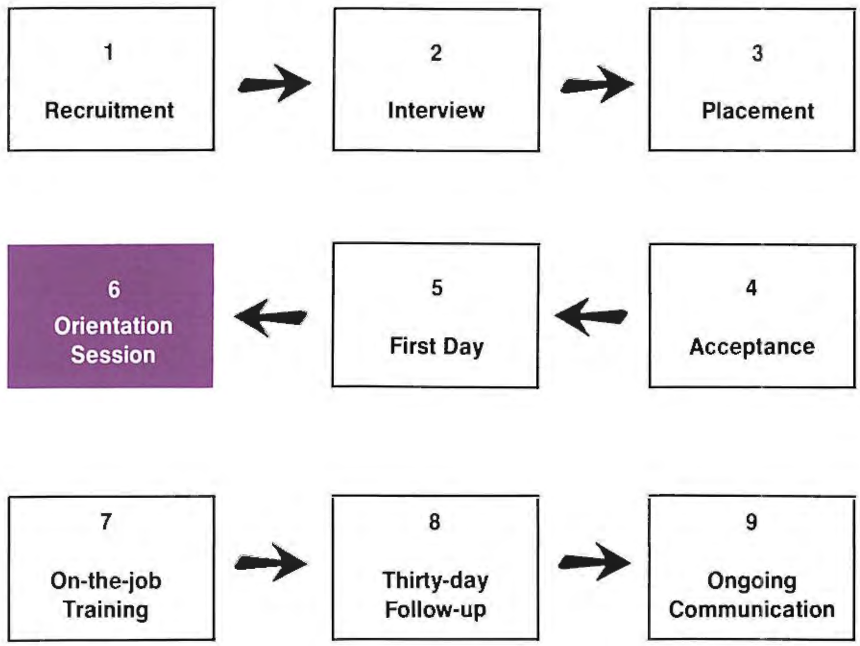
When new staff start working for an organization, they need to be encouraged to learn as much about it as possible. Management should let new staff know that orientation is important to the success of the organization and to success in their jobs.

Studies carried out on learning retention during training programs, including orientations, show that management support can greatly increase a participant's "readiness" to learn, thus increasing their retention. This support should be visible.

There are several ways a management team of paid and volunteer leaders may visibly support the orientation process:

1. Notify new staff of the objectives, content and intended outcomes of the orientation by sending a letter signed by the manager or chairman.
2. Schedule the session during convenient hours and in a comfortable physical environment. If the orientation is for volunteers who work elsewhere during the day, it should be scheduled during the evening.
3. Inform new volunteer staff that their participation in orientation is crucial. Their success in their job unit and the success of the organization depends on how well they know the organization.
4. Develop a mentor program for new staff for informal, on-the-job training and for answering questions during the orientation process.
5. Conduct a question-and-answer period at the end of the orientation session. It is preferable to have a member of the management team lead this period. Presenters should ask participants at the beginning of the session to think of a specific question they would like to ask. Every participant should be given the opportunity to have his/her questions answered.
6. Participate in the orientation as speakers.
7. Relieve trainees of normal work duties during orientation.
8. Encourage, or even require, volunteers to attend, even if they must make a special trip.
9. After the orientation, reinforce all of the material learned, particularly the values, key commitments and goals. Managers and volunteer supervisors should give feedback on whether or not volunteers are demonstrating these values and commitments.
10. Provide new volunteer staff with opportunities to continue learning about the organization. The purpose of orientation is to enhance the effectiveness of new staff by providing a comprehensive view of the organization.

PRESENTER'S GUIDE:
The Nine-Step Model



To be an effective presenter for an orientation, you must believe in the important role of orientation as it enables the organization to attain its mission and goals.

Orientation is an ongoing process that begins with the interview, continues through the first day on the job and a formal orientation session, and ends when the paid or volunteer staff person is fully comfortable in his/her new position.

The nine-step model illustrates the orientation process. Each step is equally important in providing a balanced picture of the organization during the early months of volunteering. The focus of this article is on step 6 of the model, the orientation session.

The Presenters: Who Are They?

No special training is required for presenters to deliver the orientation session. However, presenters should:

- Have been with the organization long enough to have earned credibility and respect within the organization. They should also have a working knowledge of the history, structure and operations of the organization so they can answer participants' questions. They should know where to find information to follow up on questions and know how to communicate feedback from participants to the appropriate persons.
- Have demonstrated facilitation skills and be confident speaking in front of a group.
- Believe in the importance of orientation and practice the underlying principles and values of the organization.
- Possess enthusiasm and reflect a positive attitude about the many opportunities available in the organization.

Having more than one presenter adds variety and a change of pace to the session. Also, the videos, overheads and flip charts used in the orientation are easier for two people to manage. A possibility would be a paid-volunteer staff partnership.

Orientation Design

Many of the elements in the orientation contain suggestions on how to deliver the orientation. The format (developed by Zenger-Miller, a firm specializing in training, and the authors of the Frontline Leadership program) was selected to provide you with clear, comprehensive guidance on how to present the information most effectively.

The design should include directions to the presenters, scripted statements and questions. Presenters are strongly encouraged to present the content in their own words, rather than reading or memorizing it. The scripted style is used only to ensure that all information is given and that the meaning will be clearly understood by presenters.

Several action verbs can be displayed in bold type to signal the beginning of a new point or a change in focus or topics. For example:

ASK = Ask questions.

BRIDGE = Connect information from one section to the next.

DISCUSS = Ask several questions to involve all participants.

EXPLAIN = Explain the content of a particular point.

FURTHER EXPLAIN = Add more information to the same point.

LIST = Record information on a flip chart.

NOTE = Give directions or pointers to the presenters.

POST = Display a poster or a flip chart.

RECORD = Write participants' responses on a flip chart.

REFER = Refer participants to a resource piece in their folder.

SHOW = Introduce and show a videotape or overhead.

SUMMARIZE = Recap the information presented.

Planning for the Orientation

To ensure that the orientation session goes smoothly, it is a good idea to be well prepared. You should know the content and the participants, modifying the content as necessary, and you should be prepared logistically. Below you will find some pointers on each of these topics.

1. Content

- Preparation time will vary depending on the experience of the presenter. However, if this material is new to you, you should allow more time.
- Read all the material ahead of time—including the course design content, all of the materials in the participant folders and additional reference materials. This will help you retain your overall knowledge and feel more comfortable when answering questions. Practice what you are going to say with a friend or group.
- Review the overheads and videotapes before the session to be sure you know the content and to feel comfortable in presenting them to participants.
- Add relevant and interesting information about your own experiences. *In fact, the more specific you are about your program, the more useful the orientation will be to the participants.*
- In your planning, allow enough lead time to order materials and to prepare visual aids and handouts. (See below for tips on flip charts, overheads and handouts.)

2. Logistics. The logistical support for the orientation may be the responsibility of either the presenters or other persons in the agency. Clarify who will provide the following and make sure all activities are accomplished.

- Assign a time for the orientation that is convenient for participants as well as presenters.
- Determine what audiovisual equipment you need and where the orientation will be held. Reserve the equipment and the space for that date.
- Send invitations to participants, including directions and parking information.
- Send letters to members of the management team and volunteer leaders to encourage their participation. Include the date, time and place of the orientation. Also, ask your president, CEO or chairman of the board to give you a typewritten letter welcoming new volunteers. Insert this letter in participant folders.
- Prepare flip charts. Have them ready in sequence for easy use.
- Make transparencies. If you do not have access to an overhead projector, you can use flip charts or make handouts. Have transparencies ready in sequence. If they are not framed, be sure to place paper between them for ease in handling.
- Prepare an agenda of the sessions, listing the beginning and ending times, and major topic headings. You may want to include a copy of the agenda in the participant folders.
- Prepare the participant folders so that they are ready to distribute the day of the orientation. Place all handouts in the folders in the order they will be presented.

3. Room setup (day before the session)

- Inspect the room the day before the session to be sure it is arranged properly.
- Set up the room so that participants can communicate openly. Be certain that the audiovisuals can be seen by all participants. It is a good idea to inspect the meeting place the day before to be sure arrangements are satisfactory.
- Set up a display table for resource materials. Display the organization's logo, especially if the meeting is not being held in the agency's facility. If possible, set up a display of photographs showing activities, promotional materials, annual reports and the like.
- Project your voice from where you or other presenters will be speaking. Ask someone in the room if you can be heard from several points in the room. If not, change the room setup.
- Check the heating, air conditioning and ventilation of the meeting room.
- Test the VCR and television monitor and make sure the videotape is at the right starting place. Test and focus the overhead projector. Have an extra light bulb and fuse handy, just in case.
- Have extra handouts, chairs, blank name tags and certificates available for unexpected arrivals.

4. Day of the orientation

- Welcome participants and introduce them to each other as they enter the room.
- Have name tags and name tents ready, or ask participants to make their own.
- Welcome the participants as a group, explain where the restrooms are, and offer refreshments if available.
- Start the session.

Delivery of the Orientation

1. Presentation and group facilitation skills. If you are a novice at presenting information or facilitating group discussions, listed below are ways to help you feel more comfortable as a presenter, and to help participants feel comfortable about participating. These tips are designed to help you in your presentation and in facilitating group discussions. It is important to get participants involved in group discussions because adults bring a vast amount of experience to every learning situation. They prefer to participate in discussions rather than be lectured to for long periods of time. Visual aids also help the learning process.

- Be flexible and creative in delivering the content material—you may use a variety of methods.
- Present the material in your own words to allow for a conversational, natural presentation and to allow you to develop your own presentation style.
- Practice using all visual aids so they will flow easily and in sequence.
- Lead discussions by following some basic rules:

—Wait for participants to present their own ideas. People need time to think before speaking. Do not feel rushed or make participants feel rushed.

—Reserve your own ideas, opinions and illustrations until participants have had a chance to respond. Your ideas may be needed to amplify or redirect the discussion.

—Accept each contribution with a positive comment such as "That's an interesting idea" or "good." Welcoming and valuing all persons' contributions stimulates them.

—Sidestep sensitive questions or irrelevant observations by making a comment such as "That's an interesting point—we can discuss it later. I can tell you where you can learn more about . . . . "

—Avoid calling frequently on the person who tends to monopolize the conversation. Say, "We would like to get ideas from as many persons as possible." Interrupt the talkative participant with a similar comment.

—Restate the questions or summarize briefly when participants' comments cause the group to stray from the main point.

2. Pacing yourself. Set a timeframe for the orientation session including breaks. Note next to each topic heading a suggested timeframe in which to deliver the information. These timeframes will help you determine the pace and the amount of detail that should be addressed in each section. You may want to expand a particular topic to reflect its importance. Be aware, however, that these changes will affect the time allowed for the entire orientation program.

Other factors that will influence the timing and pace:

- Your rate of speech
- Repetition of key points or phrases
- Repetition or rephrasing of questions
- Extension of discussions
- Use of probing questions
- Use of examples and anecdotes
- Time spent on a topic of interest to the group
- Pauses and breaks

3. Using training aids. Effective presenters vary training methods and use visual aids, including handouts, videos, overheads and flipcharts. These aids stimulate participants by providing variety. Below are some tips on how to use them effectively.

■ Videos

—Always review videos before the session to become familiar with their content and with where the video begins on the tape.
—Clearly explain exactly what you want participants to look for in each video.
—Keep the discussion focused after the video is shown, but allow participants to enrich the subject matter.
—Always reinforce the key points of the video.

■ Overheads or Transparencies

—Transparencies are relatively inexpensive to make. They cost about $1 each and come in many colors.
—If you have a photocopy machine with an enlargement feature, you may want to enlarge typewritten copy for easier reading.
—You can make transparencies more lively by using water-based markers and by drawing borders or cartoon characters on them. However, remember that too much extraneous material will be distracting.
—Before you use the overhead projector, practice until you can move the transparencies on and off the projector smoothly, from a position that will not block the view of participants.
—Ensure that the transparencies are projected large enough so they can be read by all participants.
—Put a transparency on the projector before switching it on so that the audience will not be looking at a blank image.
—Turn the projector off when you are not referring to an image.
—Have a spare bulb and fuse handy for the projector.
—Remember that transparencies should be used only to illustrate *key* points in a lecture (write only key words on them).
—Do not turn your back to the audience or stand in front of the screen.

■ Newsprint (or flip charts)

—Print with simple letters, using both upper case and lower case letters.
—Use an outline format.
—Whenever possible, leave plenty of blank space.
—When presenting, avoid talking to the flip chart. Talk to the group.
—Write quickly, using only key words.
—Use a dark-colored, broad-tip felt pen. Use a variety of colors to provide visual stimulation.
—Have masking tape available to post sheets.
—Use a stand or easel to hold the newsprint.

■ Handouts

—Use to reinforce important information.
—Handouts allow participants to study a topic more thoroughly.
—Use sparingly so that participants are not overwhelmed.
—Handouts should be easy to read.

FUN FACTS: AN ICEBREAKER

If there are more than 20 participants, this exercise is a good icebreaker. It will help create a positive and open climate and give new volunteers an opportunity to meet each other. Follow these procedures to conduct the icebreaker:

1. Read the attached form to understand the icebreaker exercise.

2. Have the Fun Facts sheets available at the registration table.

3. Have the person who welcomes the participants direct them toward the coffee and tell them they have an exercise to complete before the program begins.

4. Be sure to have someone sitting at the registration table to receive completed forms before the session starts and during the break. When participants turn in the form, cut off the name at the bottom and place in a "prize box" for a drawing to be done later in the program.

5. Make sure the participant's name is written on the bottom of the form.

6. At the designated time, ask a volunteer to draw one name from a box. Announce the winner and present him or her with a prize.

Option: Gather a handful of completed Fun Facts sheets during the program. At the end of each unit, read out a couple of Fun Facts from the sheets, and ask the corresponding participants to stand up and introduce themselves.

Note: If you want participants to initiate the icebreaker themselves, it may help to post the directions on a flip chart.

"FUN FACTS" (Instructions)

WELCOME!

Discover Fun Facts about your colleagues by filling in this sheet, and become eligible for a prize drawing to be held during the program. If you haven't completed the exercise before we begin the session, you will have another opportunity to complete it during the break.

The purpose of this activity is to create a positive and open climate and to give new volunteers an opportunity to meet their colleagues. Here's how to play Fun Facts:

1. Ask any participant to tell you something interesting about himself/herself, such as where he or she went on vacation, previous job experiences and family experiences. Write the person's name and their Fun Fact on this sheet. Please write legibly!

2. Interview other participants until your sheet is completed.

3. Give your completed sheet to the person sitting at the registration desk. He or she will cut off the bottom portion where your name is written and deposit it in the prize drawing box. Remember, only completed sheets are eligible for the drawing.

4. You may not exchange Fun Facts with each other—that is, if you ask a person for information, that person may not ask you for information.

5. Try to say something different to each person who asks you for a Fun Fact.

Checklists for Setting Up the Orientation

TIMETABLE CHECKLIST

6-8 Weeks

_____ Set the date for the orientation.
_____ Reserve the training room.
_____ Obtain necessary equipment, such as:
- Overhead projector
- 1/2" VCR
- Television set (you may need two, depending on the number of participants)
- 1 cassette tape recorder (for playing music to set the mood during registration)
- 2 easels and flip charts

_____ Send a memo to appropriate staff stating the orientation date, time, place and so forth.
_____ Order materials.

4 weeks

_____ Prepare the agenda.
_____ Prepare the personal invitations and posters.
_____ Send personal invitations along with the agenda, organizational brochure, and copy of your annual report to new paid and volunteer staff. Invite "no shows" from previous orientations. Display posters and other orientation announcements at your chapter or station.
_____ Prepare flip charts, transparencies and handouts.
_____ Arrange for the registration table, the resource table and the participants' tables.
_____ Stuff participant folders, reproducing any items that may be missing.

Day Before Orientation

_____ Set up the training room—the display table, the registration table and the audiovisual equipment. Check to make sure the equipment is operating properly.

After the Orientation

_____ Clean up the room and store materials.
_____ Take an inventory of supplies and folders, and replace them as necessary.

PARTICIPANT FOLDER CHECKLIST

_____ Agenda
_____ Welcome letter from management/volunteer leadership
_____ Mission statement and corporate goals
_____ Principles and values
_____ Your goals and objectives
_____ Trivia quiz about organization
_____ Annual report (if not included in invitation)
_____ Local structure/organizational chart
_____ Management staff and board roster
_____ National sector management (optional)
_____ Volunteer structure and partnerships
_____ Participant reaction form
_____ Resource list

EQUIPMENT AND SUPPLIES CHECKLIST

Registration Table

_____ List of participants
_____ Sign-in sheet
_____ Pens, pencils and felt-tip markers (with medium points)
_____ Name tags
_____ Participant folders

Participants' Tables

_____ Writing paper
_____ Name tents
_____ Pencils or pens

Audiovisual Equipment and Training Aids

_____ VCR (1/2") or projector
_____ 1 or 2 television monitors
_____ Overhead projector
_____ Video or film
_____ 2 flip charts and easels (1 prepared, 1 blank)
_____ Transparencies