Tools for Training VOLUNTEERS

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An exciting part of volunteer management is the opportunity to assist in the volunteer's development. The challenge is how to enable the volunteer to do the best possible job while enjoying the experience. The solution is carefully planned growth through the acquisition of the necessary knowledge and skills while in a supportive work climate. Volunteer development is accomplished in stages through introduction to the job, orientation to the agency, training for specific jobs and on-the-job support and supervision.

Between the time of selection and assignment of responsibility, motivation to learn and willingness to give time for the learning process run high. The volunteer is eager for information and guidance. Therefore, development should start at once.

Introduction to the Job

Introduction to the job takes place during the interview or on the volunteer's first day at the agency and should include
● The job's relation to the total program
● The agency's volunteer policy (e.g., on insurance, reimbursement of job-related expenses, etc.)
● Training necessary prior to beginning the job
● The roles of the volunteer, supervisor and director of volunteers, and how they interrelate
● General agency and department procedures.

A visit to the area in which the volunteer will work and introductions to support and supervisory staff are in order. Before the first day is over, an agreement should be drawn up clarifying the role of the agency and volunteer. The volunteer's side of the agreement will be based on the job description, while the agency's will be based on its volunteer policy.

Orientation

Orientation follows the introduction to the job as soon as possible, on the first day if time and circumstances permit. While training applies to the specific job and is geared to the individual, orientation concerns the agency as a whole and is geared to all new recruits. To establish a sense of belonging, the volunteer needs to be as knowledgeable about the agency as possible. Orientation content should include information about the agency's program, goals, clients, policy and its expectations for volunteers (e.g., punctuality, confidentiality, accountability, etc.). It is also important to know how the agency fits into the larger picture locally, regionally and nationally in its field of service. The volunteer should understand the necessity for training sessions and make a commitment to attend.

Presentation of orientation material may be formal or informal. A formal presentation is a better way of conveying information; an informal one is better for building constructive relationships among paid and unpaid staff. The orientation may be held for one or a number of volunteers, depending on time and resources available. In preparing the agenda, staff members should be involved in determining content and presentation methods. Not only do they have the expertise that is needed, but they will feel more a part of and responsible for the volunteer program as a whole. Consider using visual aids in the presentation. Entertaining as well as educational visual aids are often more productive than a speech.

Training

Having become familiar with the total agency, the volunteer is now ready for specific job information. Job training should be aimed at both preparation for and on-going development in a specific position. By matching the requirements listed on the job description with the skills and knowledge the volunteer brings to the position, the missing requirements can be identified and established as the training goals. Three important types of training are pre-service, in-service and technical assistance/advanced workshops:

Pre-Service: Training from the time of recruitment to the beginning of the volunteer's actual work for the agency. Some ways of conducting preservice training are identified as follows:
● Structured observation, tours of the agency and its program sites, attendance at staff meetings, informal talks with other staff in which the volunteer meets a cross-section of staff to become familiar with the various components of the agency.
● "Apprenticeship observation" in which the volunteer is assigned varied but brief work responsibilities with experienced staff as background for a decision regarding placement.
● Role-playing during which the volunteer builds confidence in meeting new situations.

In-service: Training that begins with the job inception and builds continually. Most inservice training happens informally,

but structured sessions should be planned by the Director of Volunteers as the situation warrants. Ways of providing structured training include

- Co-volunteer meetings
- Input sessions to advise volunteers of new job information
- Use of resource materials or persons, or problem-solving clinics.

Technical assistance and advanced workshops: Sessions that provide for in-depth training of volunteers with some job experience. Three possible ways of giving technical assistance are

- With a technical expert who can consult with the volunteer on a particular problem
- Through a technical resource information unit that provides technical information and resources
- Through technical resource articles focused on various program areas.

The emphasis of advanced workshops is on strengthening old skills, learning new skills and preparing the volunteer for new responsibilities.

Innovative training opportunities include "exchange of practices" institutes for people with similar jobs from different agencies, "mini-sabbaticals" to visit other program sites or attend training seminars, and courses pertaining to the volunteer's job offered by outside organizations.

In planning a specific training session, there are many formats to choose from. However, each session will be unique because the whys, whats, whos and hows lend their own distinctiveness. The subject matter needs to be relevant, thorough, open to group input, carefully paced, action-oriented and individualized. Other important considerations are scheduling, location, instruction, learning climate, materials and evaluation.

As Marie MacBride in her book *Step-by-Step* points out, evaluation can be useful during a session to determine "if the training is on track" and following a session to provide input for planning future sessions.

Volunteers want to perform their responsibilities competently. They want to experience success in their jobs. The agency that carefully provides opportunities for volunteer growth and development will greatly increase the probability of volunteer satisfaction and excellence of performance.

TRAINING BOARD VOLUNTEERS IN SEATTLE

In Seattle, Washington, the Volunteer Services Department of the King County United Way has honed its board training skills since participating in a Kellogg Foundation-funded pilot in 1979.

Today, 30 volunteer trainers, trained and certified by Volunteer Services, conduct three-hour workshops for board volunteers based on any of the following curriculums:

1. Essentials of Successful Boards
2. Operational Strategies for Boards
3. Planning and Goal Setting
4. Legal Issues
5. Managing Change
6. Cooperative Action in the Community
7. Personnel
8. Financial Decision-Making
9. Fundraising
10. Public and Community Relations
11. Marketing
12. Evaluation

Nonprofit agencies may request any of the modules, which Volunteer Services is willing to offer in a retreat setting, or board members may attend the open registration workshops held twice each year. Individuals may take the complete series or register for single workshops. A registration fee, ranging from $10 to $20, is charged for each training workshop. Through a grant from Faithco Insurance Company, Volunteer Services also offers partial and full scholarships.

Boards also may take advantage of Volunteer Services' Training Needs Survey, a free service available upon request of a board or executive committee. Board members and key administrative staff complete the survey, which provides assessment in five key areas of board responsibility. Results are matched to specific board training workshops.

There are four primary benefits of this board training program, Volunteer Services Director Jan Knutson says:

1. The board-experienced certified volunteer trainers offer a peer relationship with volunteer board member participants.
2. The copyrighted curriculum has been tested, distributed and evaluated nationally.
3. Special training and development needs can be determined and met.
4. Volunteer board members and the agencies they serve profit from improved communications and decision-making skills.

ORIENTATION CHECKLIST

An orientation session can often be useful as a screening tool. Such a session can help people realize that the situation is not exactly what they wanted and screen themselves out before too much time is invested.

Include members of the staff in the orientation as well as top administrator and volunteers. Allow one to two hours for the session.

The following format can be used for both your volunteer handbook and orientation session:

☐ The importance of volunteer service to the agency

☐ Philosophy, purpose and history of the agency

☐ A glossary of terms and definitions applicable to the agency's services

☐ Profile of the clientele served by the agency

☐ Organizational structure (a chart is helpful)

☐ Services provided by agency

☐ Relationship of volunteer program and role of volunteer to total agency program

☐ Relationship of agency to other agencies and community

☐ Policies and procedures; rules and regulations

☐ Board and staff list

☐ Information about insurance, expenses incurred by volunteers, reimbursements, and other subjects related to volunteers

☐ Floor plan of agency.

(Excerpted from the Kansas City Volunteer Management Handbook for Effective Development of Volunteer Programs, *Ann Jacobson, editor and VAC director. See listing in Tool Box near back of this issue for description and ordering information.)*

STEPS TO TAKE IN DEVELOPING A TRAINING PLAN

- ☐ Identify the specific tasks you want the volunteer to do in the job assigned.
- ☐ List the skills that will be needed to perform these tasks.
- ☐ List the attitudes and specific behaviors that will be needed to perform the tasks adequately.
- ☐ Determine which skills, attitudes and behaviors the volunteers need after reviewing their experience and background.
- ☐ Design a training program that will enable the volunteers to achieve the needed skill/attitude level by the end of the training program.
- ☐ Develop a form to evaluate the training program.
- ☐ Decide what content is needed to teach the skills and attitudes; for example: background and history, reference books, philosophy, written rules and procedures.
- ☐ Decide what methods you want to use to achieve the training objectives; for example: lectures, role play, films, discussions, etc.
- ☐ Estimate the amount of time necessary to carry out the training program.
- ☐ Decide whether the training should be pre-service, in-service, OJT (on-the-job), or a combination.
- ☐ Determine what training materials will be needed (including audio-visual equipment).
- ☐ Identify the people you need to carry out the training program.
- ☐ Implement the training program.
- ☐ Evaluate the volunteer based on the pre-established learning objectives.
- ☐ Evaluate the effectiveness of the training program.

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Can You Answer 'Yes' to These Questions about ORIENTATION AND TRAINING*

- ☐ Are time and personnel for volunteer orientation included in your planning for the involvement of volunteers?
- ☐ Do all individuals and group volunteers working in your program understand why the assignment they are doing is important and how it fits into the total program picture?
- ☐ Are volunteers given a place to work and keep their belongings?
- ☐ Are volunteers introduced to the paid staff members and volunteers with whom they will be working?
- ☐ Do your volunteers, both individuals and groups, know what is expected of them to do as to:
    - ☐ performance?   ☐ confidentiality?
    - ☐ appearance?   ☐ attitude toward clients or patients?
    - ☐ conduct?   ☐ acceptance or supervision?
- ☐ Can they differentiate between the role of the volunteer and that of paid staff?
- ☐ Have you prepared manuals or other printed material to help volunteers keep in mind the things they need to know?
- ☐ Do you acquaint all volunteers with the program's total facilities and with the names of its various department heads?
- ☐ Are your volunteers sufficiently informed as to the agency's purpose, program and philosophy to discuss these intelligently with their families and friends?
- ☐ Do you give volunteers an opportunity to acquire the skills needed for a particular assignment through:
    - ☐ informal instruction?
    - ☐ formal training programs?
    - ☐ consistent on-the-job training?
- ☐ Have you explored community resources, including the Volunteer Center, for the types of training that your program is unable to provide?
- ☐ Do you keep the orientation process from becoming static through:
    - ☐ periodic volunteer meetings?
    - ☐ discussion sessions?
    - ☐ invitations to pertinent workshops?
    - ☐ suggested reading materials?

From the Volunteer Management System Course of CALLVAC Services, Inc., Columbus, Ohio. List developed by Bunny Cosimati, Volunteer Coordinator, Mt. Carmel Hospital. Submitted by Kitty Burcsu, CALLVAC Services.

VOLUNTEER TRAINING SELF-ASSESSMENT FORM

	YES	NO

Orientation

*1. Orientation is required and provided for all volunteers.
*2. Top management and paid staff are involved in orientation.
*3. Our organization provides each new volunteer with a written orientation manual.
4. Our orientation includes:
   a. Information on the organization's purpose, programs and philosophy.
   b. Role of the volunteer in the organization and how it differs from paid staff.
   c. Role of the paid staff member in the organization.
   d. A tour of the organization.
   e. Opportunities to meet paid staff, volunteer staff and top management.
   f. An explanation of volunteer policies/procedures.
   g. An explanation of what is expected of the volunteer.
   h. Information on what the organization provides for the volunteer.
   i. "Logistical" information (where to park, where to hang coats, etc.)

Pre-Service Training

5. Pre-service training is required and provided for all volunteers.
*6. Concepts of adult learning are incorporated into training methodology.
*7. Training is planned and coordinated with supervisory staff.
8. Our pre-service training:
   a. Is based on an assessment of volunteer's skills.
   b. Is based on an assessment of volunteer's training.
   c. Addresses the specific responsibilities/activities of a given position(s).
   d. Provides for the development and/or refinement of skills related to the position.
   e. Addresses values clarification.
   f. Provides for information and discussion on issues and trends in our field.
   g. Provides a bibliography or reading list related to the position.
9. Our pre-service training includes opportunities to observe real-life situations and/or work under close supervision.

In-Service Training

10. Regular in-service trainings are held and volunteers are encouraged to attend.
11. Some in-service events are held and volunteers are *required* to attend.
12. The staff-development sessions held for paid staff are also open to volunteers.
13. Our organization also encourages volunteers to attend staff development sessions.
14. Our organization invites volunteers to attend relevant workshops, seminars, etc. outside of the organization.
15. Our organization sometimes pays for volunteers to attend relevant workshops outside of the organization.
16. In addition to in-service training related to our specific volunteer positions, we provide training on:
   a. Goal setting
   b. Documenting and using volunteer skills
   c. Incorporating volunteer experience in resumes
   d. Skill assessment
   e. Stress management
   f. Time management

*Contained in Volunteer Action Center's *Standards for Volunteer Programs.*

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