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The **Last** Virtual Volunteering Guidebook

Fully Integrating Online Service into Volunteer Involvement

Jayne Cravens and Susan J. Ellis

Energize, Inc.
Philadelphia

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Chapter 5
Orienting and Training Online Volunteers

By this point you have laid the essential groundwork for success with online volunteers. You have:

- Adapted existing policies and procedures for onsite volunteers to apply equally to virtual assignments.
- Designed a range of volunteer assignments that can be completed online.
- Developed an area of your organization's Web site that provides full information about volunteers, including position descriptions for any open volunteer role onsite or online and a posting of all important policies and procedures a volunteer should understand in advance.
- Provided a way for interested people to apply online or through forms they can download from the Web site.

With individual applicants, you have:

- Received whatever documents you requested to conduct appropriate screening and possible background checks, including acknowledgement that the applicant has read and agreed to the policies.
- Proceeded far enough into the process that both you and the applicant know you want to continue moving toward accepting the person as an online volunteer.

If you are unsure of any of these elements, we encourage you to read the previous chapters that introduce them all. Otherwise, we assume you are ready for the next step: preparing the new volunteer to make a final commitment and to begin the volunteer work.

New Volunteer Orientation

No matter how skilled they may be in the work they have agreed to do, all new volunteers need an orientation to your organization (or, as our British colleagues call it, *induction*). This includes an explanation of the organization's mission, goals, service focus, and value to the community—and the rules for all volunteers. New volunteers thereby learn to understand the organization and put their contributions into the context of the larger organization. This can include basic information, such as the history of the organization, a description of the clients served and the services provided, funding sources, and more. It should also include key "need-to-know" facts such as policies on confidentiality, risk management and safety procedures, chain of command for decision making, and so on.

You need to find a balance between overwhelming new volunteers with too many details and keeping them in the dark. Of course, you have the ability online to highlight key information on the Web site and then provide links to lengthier details that someone can choose to explore or not.

Beyond facts, an orientation sets the tone for the working relationship you want to establish with volunteers. It is possible to be welcoming, even humorous, and still convey serious intent.

For online volunteers who will do most or all of their service remotely, the orientation emphasizes that your organization and its work are real and that online service is a valued part of achieving your organization's mission. It is an opportunity to express your expectations and also to extend a warm welcome. This helps motivate volunteers to complete the activity they have undertaken and starts them on the road toward becoming longer-term supporters and even financial donors.

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At an onsite volunteer orientation, volunteers are often asked to sign a statement saying they have read and agree to the policies of the organization and the requirements of the assignments they wish to pursue. The orientation leader may say, "Let's take a few minutes for you all to read these materials before you sign the document saying you have read and agree to them," and then observe to make sure new volunteers are, indeed, reading the materials. Note that this cannot happen online; sending materials via e-mail or putting them up on a Web site is no guarantee that a volunteer has reviewed them. If this is a concern, develop a short quiz, a specific follow-up e-mail, or an interactive session for the new online volunteer with questions or conversation points that will let you know whether or not the volunteer has reviewed all necessary material.

Real-world single days of service such as a riverside cleanup become more successful by explaining to volunteers why they are picking up trash, why the organization has undertaken this activity, and how to stay safe during the event. Similarly, even if a new online volunteer will do a very brief assignment—such as proofreading a two-page document or testing a new online tool—that volunteer should receive some sort of formal welcome and orientation taking only a few minutes, not hours. It could be just a short narrative and a few questions that confirm the candidate understands what he or she is going to do and why. But this simple orientation and screening process will ensure micro-volunteering tasks are completed and you do not spend valuable time reassigning these tasks again and again, hoping someone *eventually* completes them.

Moving from Onsite to Online Presentation

Whatever you currently make available onsite at new volunteer orientations needs to be available online, either publicly on your organization's Web site or via your private online forum for volunteers (see chapter 2). That means posting policies and procedures, staff lists, tip sheets, work sheets, all forms, and handbooks. Current onsite volunteers as well as new online volunteers will appreciate this because everyone may need to reference these materials in the course of their service. You may find that placing your orientation materials online cuts down on the amount of time all new volunteers need to spend with you in person for the orientation process; you may decide to give onsite volunteers the option to do some of their orientation activities online, too.

The EPA's Volunteer Monitoring Program

A good example of making traditional volunteering materials available online for those volunteering virtually is the Web site for the Volunteer Monitoring Program of the U.S. government's Environmental Protection Agency (EPA).[1] This is an umbrella site for the many locally-based programs that mobilize and train volunteers in pollution prevention and monitoring. These volunteers monitor various environments and report on water quality, build awareness of pollution problems, help clean up problem sites, and provide data that is used by decision makers at all levels of government. EPA-produced support materials for these remote volunteers are all available electronically.

Online Video Orientation

Do you have a video that new volunteers watch at the onsite orientation for your organization? Get it converted to an online format and put it online! An online volunteer can even help with this conversion. If it is appropriate for this video to be public, you can upload it for free to online sites like YouTube or Vimeo and give new online volunteers the Web address. Your traditional, onsite volunteers may appreciate this as well; some will probably want to re-watch the video.

Developing orientation materials for online volunteers may give you the incentive to create a brand new video (or video series) for all volunteers, or you can produce something specifically for online volunteers (Infinite Family's online volunteer video is described in chapter 4). This video can be quite simple and made with resources you probably already have; almost all new laptops and tablets, regardless

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of operating system, come with a built in webcam and software to record videos. If you are just entering the world of online video, visit "Creating a Video Lecture" on Wikiversity[2] for the step-by-step basics of creating a video and posting it online. You might also visit OnlineVideo.net for more in-depth tutorials about producing videos for the Web.

Here are three examples of online videos for new volunteers. They were created for volunteers working onsite but will help you think about how you might approach online video orientations especially for virtual volunteering. More examples are listed on the Virtual Volunteering Wiki.

- Volunteer Orientation for World Relief Durham, http://vimeo.com/67855979
- Safe Sanctuaries Training (for reducing the risk of child abuse in churches) by Missouri United Methodists,[3] http://vimeo.com/35632870
- Parent Volunteer Orientation 2012–2013 by the Clinton Township (New Jersey) School District, http://vimeo.com/51937171

Once again, remember that online video is not accessible for people who do not have very fast Internet connections or relatively new hardware and software, or for people with some disabilities, such as hearing impairments. Online video should not contain any information that is not replicated in written materials and available to volunteers. If at all possible, create closed-captioning for any online video your organization produces; this not only helps people with hearing impairments but also helps people who may not be fluent in English.This is yet another task with which online volunteers could help!

The Case for Putting All *Your Volunteering Information Online*

We are often taken aback at the reluctance of VRMs or other staff to put most of their volunteering information online for anyone to see, including: volunteer policies and procedures; a list of tasks volunteers undertake; requirements for new volunteers; details about reporting requirements for volunteers, etc.

Some VRMs say they fear such information will scare potential volunteers away. On the other hand, perhaps it is best to scare some potential volunteers away before they get to your interview or orientation and discover that the requirements are more than they can handle or that volunteering at your organization is just not a good match for them.

But in reality, not every potential volunteer candidate is going to read all of the information right away—they will only read just enough to convince themselves that volunteering with your organization is right for them or not. Putting pertinent information online not only demonstrates transparency; it also shows just how seriously your organization views volunteer service.

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