ORIENTATION & TRAINING

Orientation Sessions

Orientation sessions are an important part of welcoming and informing your new volunteer base about your organization and the staff that they will be working with the most. It's often one of the first impressions people get of your organization, so making an effort to plan and practice the material you will deliver will have a huge impact on volunteer recruitment. The importance of holding orientation sessions or information sessions cannot be stressed enough. This is your way of welcoming potential volunteers into your organization, publicly reinforcing your commitment to diversity and inclusion. It also gives you the opportunity to come face to face with potential volunteers. For some organizations, attending an orientation session does not necessarily mean that the person becomes a volunteer. Sometimes, these sessions are followed up with one-on-one interviews or other screening processes to ensure that the candidate is a good match for the roles in the organization.

Once an interested candidate fills out an application, it's important to let them know what the next steps are in the volunteer process. Selecting orientation dates early on in the planning and prep stage ensures that you can communicate these dates to potential volunteers and gives them enough time to clear their schedules. The number of sessions you hold is entirely dependent on the overall number of volunteers you want to recruit (keep in mind that generally 50 per cent of people who RSVP for your session actually show up) and the size of the orientation session space. Before booking your space, take a quick moment to ensure that you have a fully accessible space for any interested applicants with mobility impairments.

To help you prepare for the session, set up a quick RSVP to keep track of numbers (Appendix K). This RSVP form is also handy to send out reminders a couple of days before each session so that you maximize the occupancy of each orientation. Feel free to utilize a Google form or something similar, or schedule the orientation sessions into your volunteer management software so applicants get to know your software and how to schedule themselves. Scheduling orientation sessions into your management software only works if you grant access to applicants before they attend orientation, and some organizations prefer to grant access to volunteers only when they complete orientation and are ready for the next stage in the process.

Plan ahead and take some time to think about the logistics of the session. Will attendees be signing in at the session? Will they receive any material about your organization? Ease your mind on the day of the session by enlisting the help of your current volunteers. This is another great way to involve current volunteers in the planning process and keep them engaged while you run around and work on other potential issues that may arise (Appendix E). Consider the following roles for your volunteers:

- Set up and tear down
- Signing attendees into the session
- Directing attendees to the right space
- Handing out orientation material to attendees
- Answering general questions about the space and session (the duration of the session, where are the washrooms, etc.)

Finally, the pièce de résistance, the voice of your organization and the thing that will captivate and motivate your applicants into continuing their volunteer journey: your presentation. Your presentation speaks volumes about your organization. It's a great indicator of how organized things are and the general feeling of the place. You want to wow your potential volunteers and impress them right off the bat, so take some time and make your presentation dynamic and fun. The use of PowerPoint, Keynote and Prezi will engage your audience and give them something to look at while you are speaking. Use multimedia in your presentation to mix things up; throw in some images of volunteers in action, maybe starting off with a quick video about your organization, or animating the slides of your presentation.

Now that you have a great-looking presentation, think about the delivery of the material. You don't want to have an amazing presentation with a dry delivery. Inject some enthusiasm and fun into the presentation, but most importantly, write, plan and practice your talking points. A lot people think that most preparation time should be focused on the content and look of the presentation, but in order to deliver a great presentation, one must practice the act of presenting. After you have plotted out your portion and rehearsed the material yourself, plan rehearsals of the orientation as a whole group. A good tip for a dynamic presentation is to avoid having one person speak for the full duration of the session. Bring in a guest speaker (i.e. staff member who will be supervising volunteers in the future), show a quick video about your organization, have a volunteer cover the roles that are available or speak about their experience. No matter what you choose, do not omit practising.

Lastly, be respectful of people's time. If you advertise that your session is one hour, make sure your presentation is one hour, not 90 minutes. People plan to come to your session, so do the same for them and plan your session accordingly. Don't forget, practice makes perfect. Take some time to complete a couple of dry runs to time yourself and to make sure you are comfortable and confident with the content on presentation day.

The following is a guide for planning an orientation session; feel free to amend it to best suit your organization. Here is a general outline of things that you should cover in your orientation session with a detailed explanation of each below:

- Welcome Volunteers & Overview of the Session
- Introduction of Your Organization & Staff
- Volunteer Expectations & Roles
- Volunteer Benefits
- Scheduling of Volunteers
- Policies & Dress Code
- Program Evaluation, Feedback & Additional Resources
- Thank You & Next Steps

Welcome Volunteers & Overview of the Session

- Often overlooked, a warm welcome goes a long way to making volunteers feel appreciated right off the bat. Providing an overview at the beginning of the session provides volunteers with a road map of what to expect during the session. It will also give them a sense of timing for the session, like when to ask questions if they have any throughout the session or when they can expect the session to finish.

Introduction of Your Organization & Staff

- Volunteers want to dedicate their time to organizations that have similar values as they do. Provide a brief history of your organization and include the mission and/or values, in addition to highlighting aspects of diversity found in your organization, so volunteers can buy into your vision from the start. Make sure to introduce the staff that volunteers will be closely working with. This can be the volunteer manager, management staff or staff that will be supervising volunteers on shift, if they are available. It's reassuring for new volunteers to know who is responsible for what and where to direct any questions so that they feel more confident when communicating.

Volunteer Expectations & Roles

- Communicate anything that is expected of volunteers in this section. You should include things like:
  - Time commitment (average shift length, minimum number of shifts, etc.)
  - Location(s) of volunteer position(s) and organization office
  - Brief description of volunteer opportunities
  - Additional training opportunities (is there another session scheduled or will they be trained on shift?)
  - Customer/client base they will be working with on shift
  - How to proceed with volunteering with your organization post-orientation
  - Additional resources volunteer can refer to for more info (orientation manual or one-page info sheet)

Volunteer Benefits

- A description of the benefits/rewards volunteers get while dedicating their time to your organization. This could include physical tangible benefits like tickets to upcoming events, certificates, appreciation events, workshops and snacks on shift or intangible benefits such as meeting like-minded people, developing skills and networks in your industry and gaining work experience in their field of choice.
- Be clear of how many hours/shifts volunteers need to complete before attaining the benefits.
- Make mention of any expiry dates for rewards like event tickets or vouchers. If there is an appreciation party, it is great to mention the rough timing of the event so volunteers can plan to attend accordingly (i.e. within a month of the end of the event, etc.).

Scheduling of Volunteers

- An overview of how volunteers will be scheduled and what criteria you will be using to schedule volunteers for certain tasks. If you are using scheduling software, try to include a live demonstration of the system or images to demonstrate signing up for shifts. Make note of dates when you will be either posting shifts for sign up or finalizing the schedule for volunteers.
- Indicate any areas volunteers can update to include more information about themselves or their preferred volunteer position(s).
- Include any resources that exist about how to sign up using your system and where to find them online.

Policies & Dress Code

- Any information on dress code while on shift should be made clear in orientation. If there is a uniform for volunteers, ensure that you specify when and how volunteers can pick up their uniform. Making mention of why there is a uniform is always helpful for volunteers (e.g. security reasons, being easily identifiable, etc.).
- Cancellation policies for cancelling shifts should be clearly outlined (e.g. last chance to cancel is 24 hours before the shift). Reiterate where this information can be found online or in the manual, just in case. This will help with last-minute cancellations.
- Any policies or protocols your organization has for employees should also be shared with volunteers. If a termination policy exists within your organization, it should be clearly presented to avoid future conflicts.
- In the event of an emergency, outline what the protocol is and the location of emergency exits.

Program Evaluation, Feedback & Additional Resources

- It is important to let volunteers know how they can express their comments or concerns regarding their volunteer experience with staff. Provide them with different methods of communicating any comments or concerns in the session (e.g. email address, telephone number, one-on-one meeting with staff, etc.).
- If your organization sends out a survey to gauge volunteer interest, make note of it in orientation so volunteers can start to think about making notes of their experience with your organization.
- Make note of where volunteers can find any additional resources like manuals, how-to guides, job descriptions, etc., either online or in person. Providing your volunteers with these additional resources may seem like a lot of extra work but will save your organization time when it comes to answering basic questions in the future.

Thank You & Next Steps

- Ending the session with a thank you will once again show your volunteers that your organization values their time. Feel free to spend a couple of minutes on how volunteers impact your organization and how necessary it is for volunteers to dedicate their time.
- Provide a clear outline of what volunteers can expect if they wish to continue volunteering with your organization. Keep in mind that not all volunteers who attend orientation will continue volunteering with you, but with a planned and organized orientation session, you can count a high retention rate.

Once the session is complete, ensure that the content you delivered in the presentation is available as an additional resource. Developing these resources is crucial to increasing a prospective volunteer's confidence and knowledge of your organization and will go a long way in answering inquiries. In an effort to reduce waste, Hot Docs hands out a condensed one-page version of key material delivered in the orientation session (Appendix L) while the full orientation manual is posted online where it can be easily accessed for reference.

Developing a compulsory volunteer contract, commitment agreement or terms and conditions is an important part of communicating your expectations to volunteers. The document does not have to be long, but it does need to outline certain organizational policies that volunteers have to abide by, as well as any definitive time commitments and additional training that must be completed by the volunteer (Appendix M). Having this document readily available at orientation, or by ensuring volunteers must read it and agree before signing up for shifts, will give you another option to reiterate important policies. This document should not be static and should be amended each year to include the latest training enacted by law, like the Accessibility for Ontarians with Disabilities Act (AODA), or policies set out by your organization.

Orientation sessions are also a great way to introduce the mission and goals of your organization to your new board members. Once a new member has joined the board, invite them to an orientation session for volunteers to give them the big picture of how volunteers contribute to the success of the organization. While this is a great way of providing the overall big picture, it is even more important for providing a more personal approach to each member.

Alicks Girowski


Alicks Girowski

Vic Murray (author of *The Management of Non-profit and Charitable Organizations of Canada*) states that the two most important reasons that boards are ineffective are because the members do not know what is expected of them or they lack the skill and knowledge to make good decisions. Developing an orientation manual with important information for new board members will make them feel at ease and lay out the expectations for their role. Beth Deazeley of Imagine Canada details what is often included in a board orientation manual:

- Articles of incorporation/letters/patents
- Bylaws
- Annual report(s) and financial statements
- Minutes from recent board meetings
- Information regarding insurance (including directors' and officers' liability coverage)
- Annual fundraising plan and list of major funders
- Operating budget
- Promotional material and website information
- Annual strategic plan
- Board's current year work priorities and plan, including schedule of upcoming meetings, AGM and retreats
- Policies including confidentiality, conflict of interest, investments, equity and diversity, AODA accessibility, etc.
- Organizational chart
- Profiles and contact information for senior staff and board members
- Board and committee mandates
- Director position descriptions

A well thought-out orientation for board members will do the same for them as it will for all of your volunteers. State your expectations clearly and empower your volunteer base with knowledge of the skills they can apply in their role. Overall, this will make your volunteers feel valued and will strengthen their commitment to your organization, bringing them back year after year.

Training Sessions

Training sessions cover the detailed instruction and understanding of what a volunteer will be expected to do on shift. For some roles, training is essential in making a volunteer feel confident and comfortable in their role. While orientation sessions provide them with a general overview of who you are as an organization, the training session will dive deeper into what the expectations and tasks are for the role the volunteer has signed up for.

Take a look at the training that currently exists in your organization and ensure that it complies with training that is required by law. A good example of this is the Accessibility for Ontarians with Disabilities Act (AODA), an act set into motion in 2005 in Ontario in an effort to break down barriers for residents with disabilities. It is now mandated that all Ontario organizations train their staff and volunteers on the Accessibility for Ontarians with Disabilities Act. The training can be modified to reflect the principles of the act in accordance with situations your volunteers may come across while on shift. This extra effort in modifying standard training and by making it a requirement to volunteer will provide the volunteer with real life situations and answers (Appendix N), thus giving them the tools to solve problems on site. Access Ontario is a great online resource that provides training courses and modules (both in person and online) and will get you started on developing AODA training for your organization. By adding scenarios or interactive components into your training, you can rest assured that your volunteers will be empowered with the knowledge to work with any customer.

If your training requires attendance by a large number of volunteers, or if you have a variety of training sessions happening around the same time, it may be wise to instate an RSVP form to keep track of capacity and who is coming to what session. Depending on what your training looks like, you may need some extra hands to help set it up and tear it down, a perfect opportunity for volunteers who have volunteered for that specific role.

Resources are critical in the training process. Making sure that the volunteer has something to reference when they need a bit of help is crucial to their success in that role. By introducing manuals and the people they will be working with on shift, the volunteer can feel at ease, since they now know who or where they can turn to for help. Volunteers want to help out and successfully complete their tasks, so it's your job to provide them with all the resources they will need.

If you feel that training is an important element of your volunteer program, here are a few things to include in your session and manual:

- Welcome Volunteers & Overview of the Session
- Introduction of On-Site Staff Supervisor and/or Team
- Volunteer Expectations & Responsibilities—The What
- Demonstration of Task & Tour of Facility—The How
- FAQs
- Emergency Procedures
- Additional Training Resources
- Thank You & Getting Ready for Your Shift

Welcome Volunteers & Overview of the Session

- A welcome is a big part of making a volunteer feel valued. Use this opportunity to warmly welcome volunteers and thank them for taking the extra time to learn about their tasks. A quick overview of the day's agenda will prepare your volunteers for the session, especially if you plan on including hands-on, interactive portions of the session.

Introduction of On-Site Staff Supervisor and/or Team

- Since the trainer may be a staff member who will be directly supervising the volunteers on site, they should take a minute to introduce who they are and provide a brief description of what they do in the organization. If there is more than one staff member participating in the training, quickly introduce them and their roles.
- If the volunteer will be working with other staff members or supervisors on shift, and they are not present at training, outline who these potential people are so that volunteers are familiar with their role and feel comfortable the first day on shift.
- Outline who volunteers can refer to as a resource when they are volunteering.

Volunteer Expectations & Responsibilities—The What

- This section differs from orientation as volunteers will get a greater insight into what their duties will be on shift. Take the time to describe in detail all the duties the volunteer may be asked to do on shift. Ensure the following is taken into consideration:
  - Where volunteers are to check in and with whom when they arrive for their first shift. Provide instructions on who to contact if they are running late or need to cancel the shift entirely.
  - Description of each task the volunteer may be required to do on shift.
  - Resources the volunteer will have to aid in the task (equipment, uniform, manuals, etc.).
  - Importance of why the volunteer task exists and who it serves (customers, clients, organizational staff, other volunteers, etc.).
  - How the task fits into the big picture and helps the organization achieve its goals.

Demonstration of Task & Tour of Facility—The How

- A demonstration of how to complete the task volunteers will be asked to do goes a long way in terms of understanding. People learn in different ways, so the more ways you can incorporate in your training session, the better chance you have of reaching all of your volunteers. Feel free to use photos in your presentation, provide live demonstrations of the programs, software or equipment the volunteer will be using and/or break out into small groups allowing the volunteers to try the task themselves.
- Take the group of volunteers on a tour of the facilities so that they are comfortable with the space and know where to find any resources they may need on shift. Outline where the emergency exits are and the area where volunteers and staff gather in the event of an emergency.
- If working with a large group for a variety of tasks, you may want to set up a circuit training model. In this model, your large group is broken down into multiple, smaller groups and each group moves to various locations where a staff member or experienced volunteer demonstrates each task.

FAQs

- In order to ensure that your volunteers will be ready for their first shift, it's helpful to quickly go through some Frequently Asked Questions that the volunteer may have or that will be posed to them while they are on shift. These FAQs should be gathered before the session and come from the staff who often work on site and have experience with each task.
- Include any contacts volunteer can turn to if they cannot answer a question. It is important for volunteers to know that they have the support of your organization's staff so they feel comfortable and confident in their role.

Emergency Procedure

- Prepare your volunteer base by including the emergency protocol in training. In the event of an emergency, outline what the organization expects from its volunteers and location of the emergency exit. Often there is a meeting place where all staff and volunteers meet in the case of an emergency.

Additional Training Resources

- Providing your volunteers with additional resources to supplement your training session will give volunteers an opportunity to review material and look for answers before their volunteering begins with your organization. In most cases, this will minimize the amount of questions you will receive from your volunteer base.
- Reiterate who volunteers can turn to on shift with any questions (e.g. volunteer leader, experienced volunteer, staff supervisor, etc.).

Thank You & Getting Ready for Your Shift

- Don't forget to thank your volunteers for taking these extra steps in the volunteer program. Ensure that you want them to be fully prepared for their first day and provide them with a contact with whom they can share their feedback about their volunteer experience.
- Outline any necessary outstanding tasks that volunteers may have to complete before their first shift, like where and when to pick up their uniform. At this point, reiterate if you have a minimum shift policy (e.g. volunteers must complete two shifts per month, etc.) and whether any additional training needs to be completed before beginning.

Training does not end with a training session; it's an ongoing responsibility. Well-trained volunteers are more productive and satisfied in their roles. Ensuring that adequate on-site support is present when volunteers are on duty is a must. Don't expect your volunteers to retain all the information provided at training when they first come in to complete their task. Complete quick on-site training to refresh some of the main points learned at the session. Pay attention to the fact that not all people learn in the same way; some may need a visual demonstration of the task in addition to vocalizing your expectations. Once the volunteer has started the task, it's important to check in on their progress and ask them if everything is going well. Brand new volunteers may be shy in asking for help and will continue doing the task not knowing that their approach is incorrect. The supervisor should check in frequently, especially if they know it's the volunteer's first shift. If it is noticed that the task is being completed incorrectly, an effective way of figuring out where the miscommunication happened is to ask the volunteer how they think the task is to be completed. Once it is identified where the miscommunication lies, it may take another demonstration of the task by the supervisor to reiterate how to complete the task correctly. In this instance, it's wise to hang around for a bit and watch as the volunteer performs the task again.

There are many models of training that are available and include:

- Group training
- Computer-assisted training
- On-site training
- Peer mentoring programs
- Simulations

It all depends on what the task is at hand and the best way for someone to learn that task. Your overall training program can include all of the above listed methods or just one. Although it may be a considerable amount of time to set up a training program, the result of having confident and comfortable volunteers is a big reward, and what's more rewarding is the increased productivity you will surely achieve.

Staff & Volunteer Leader Training

While the focus above is strictly on providing the best training for your volunteer base, it's equally important to ensure that any staff or supervisors working with volunteers are also trained on the basics of the task, the volunteer program and how to deliver feedback. You may want to consider diversity/cultural sensitivity training to address the subtle biases that can affect staff/volunteer interactions. Training your staff and supervisors will guarantee that the volunteer's experience will be consistent no matter the area they choose to volunteer within your organization. Creating a presentation or handout on how to work with volunteers will help answer any questions that may arise in the future. Ideally this material will give your staff and supervisors the following:

- Support to address any conflict on shift
- Details of what the volunteer is being asked to complete
- Policies of the volunteer program
- Guidance on how to provide effective feedback
- Contact information on how to reach you directly
- The importance of showing appreciation and how to administer benefits

A more detailed version of this training can be found in the Planning & Prep section of this manual.

In the end, you want to make certain that your supervisors feel prepared and comfortable in their roles and know what your expectations are of them. Providing your volunteers with the best experience possible relies on your organization's understanding of the volunteer program and the responsibilities of being a volunteer supervisor. This step may take some time to develop but is crucial in the development and growth of the volunteer program.


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