

Orienting Volunteers

Orientation is a critical component of any volunteer development program in that it is the first training stage for new volunteers. It's an ideal opportunity to help volunteers focus on the vision, achievements (and potential for more!), and momentum of the organization. The orientation process should provide a specific set of learning experiences tailored to various volunteer positions. Orientation should provide a sound knowledge of the volunteer organization and should prepare volunteers to begin the role for which they were selected.

Orientation can also be the first step in determining future training needs for volunteers. Marlene Wilson, nationally known volunteer management author and trainer, suggests the following specific items to include in volunteer orientation: the organization's mission, vision, values, philosophy, objectives, and staffing patterns; specific expectations and responsibilities of the volunteer role; the need for future training and the specific role description and any adjustments needed to fit the individual volunteer's talents or abilities.

Orientation is the responsibility of the supervisor. It should take place during the first three to six months of employment.

Some of the common orientation tactics are planned conferences; informal discussions of brief duration to answer an immediate problem or to offer assurance; sessions and work experiences arranged with other staff members; review and study of times and minutes; attendance at committee and staff meetings; visits to other agencies; visits to other affiliates of the same agency; review of association pamphlets and films; reading assignments; and interviews with selected volunteer leaders, including committee chairpersons.

Orientation sessions often include a summary of salaried and volunteer rights and responsibilities. This particular set was taken from Ohio's **4-H BLAST** program guide.

Rights and Responsibilities of Volunteers in 4-H

Our 4-H volunteers have certain rights and responsibilities. These include:

RIGHTS

- To be assigned a role that is worthwhile and challenging, with freedom to use their existing skills or develop new ones.
- To be trusted with confidential information that will help them carry out their assignments.
- To keep informed about what is happening in the 4-H program through communications, attendance at meetings.
- To be provided adequate orientation, training, and supervision for the role they accept; to know why they are being asked to do a particular task.
- To expect that their time will not be wasted by a lack of planning, coordination, and cooperation within the 4-H program.

Responsibilities

- To accept an assignment of their choice with only as much responsibility as they desire.
- To respect the confidence of the public and the 4-H program.
- To fulfill their commitment or notify the event superintendent, chairman, or agent early enough that a substitute can be found.
- To follow guidelines and policies as established by the university Extension system, the state 4-H program, and the county 4-H program.
- To provide feedback, suggestions, and recommendations to agents, leaders, and council officers if these might increase the effectiveness of the 4-H program.



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RIGHTS (Cont.)

- To know whether their work is effective and how it can be improved; to have an opportunity to increase their understanding of self, others, and the community
- To declare allowable non-reimbursed, out-of-pocket expenses for federal (some state and local) income tax purposes.
- To be provided appropriate recognition in form of awards, certificates, etc., but even more importantly, recognition of day-to-day contributions by other participants in the 4-H program.
- To ask for a new assignment within the 4-H program when ready for new challenges and/or responsibilities

Responsibilities (Cont.)

- To use time wisely and not interfere with the performance of other volunteers and professional staff.
- To communicate their limitations concerning their participation to the appropriate person.
- To provide feedback, suggestions, and recommendations to the leaders, council officers, or agent if these might increase the effectiveness of the program.
- To be considerate, respect others' competencies and work as a member of a team with all professional and volunteer staff.

Responsibilities of the 4-H Program to Volunteers

4-H salaried staff and volunteer managers have the holistic responsibility of orienting, supporting, and nurturing 4-H volunteers.

4-H professionals have the following responsibilities to 4-H volunteers:

- To accept volunteers as part of the staff by including them in training and meetings that pertain to their volunteer assignment.
- To establish and communicate clearly-defined lines of authority so volunteers know to whom they are responsible.
- To accept and treat volunteers with the same respect accorded salaried staff, sharing confidential information if they can function better with that information.
- To help volunteers understand why their contributions toward a particular responsibility are important.
- To communicate volunteers' suggestions for different ways of accomplishing objectives or new approaches that will improve the goals of 4-H will be taken into consideration.
- To orient new volunteers, particularly those with limited experience and resources, to feel accepted by others.
- To be willing to counsel a volunteer if the individual is no longer performing a useful function.
- To allow a volunteer to leave a particular position once the objectives have been accomplished.
- To allow new experiences, or encourage improperly placed volunteers to seek new assignments.
- To extend appropriate recognition to volunteers.
- To encourage 4-H members, parents, and professional and volunteer staff to welcome and involve volunteers.



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Expected Conduct of 4-H Volunteers

The Extension 4-H program prides itself on providing hands-on education and opportunities for youth. The major purposes of these conduct standards are to ensure the safety and well-being of youth in the 4-H program and to provide a positive learning environment.

4-H volunteers will:

- Represent Extension 4-H Youth Development with dignity and pride.
- Respect members, parents, other volunteers, extension faculty, and others. Refrain from physical or verbal abuse.
- Work in a cooperative manner.
- Conduct oneself in a courteous, respectful manner, exhibit good sporting conduct, and provide positive role models.
- Respect and follow the state 4-H policies along with specific county policies and project expectation.
- Comply with equal opportunity and anti-discrimination laws.
- Not consume alcohol or drugs at 4-H events where youth are present.
- Not use illegal drugs.
- Accept the responsibility to promote and support 4-H in order to develop an effective county, state and national program.

All 4-H volunteers must adhere to these standards. Failure to do so may lead to possible action which may include dismissal from the program.

Three Important Steps

In orientation, new volunteers learn about the organization, including its philosophy, mission, and staffing. They also learn about working with others and their specific job responsibilities.

Orientation should occur very soon after the new volunteers have been recruited. This makes their volunteer commitment real, and lets the volunteers know that what they are doing is important and needed. The three basic steps in orienting a new volunteer are described here briefly. They are taken from Missouri's **Volunteer Training Handbook**.

Step 1: Planning

Since each new volunteer is unique, the orientation planned should be unique. The volunteer and the salaried staff should work together to answer these questions:

- What does this volunteer already know?
- What does this volunteer need to know in order to do the job?
- What is the most effective way to present this information?
- Who should present this information?
- When will the orientation be conducted?

Once these questions have been answered, an orientation plan should be written. This plan should be specific, outlining when and where the training will be held, the type of training, and who will present the training.

A volunteer role agreement form and orientation checklist are useful in planning the content of the orientation. When using an orientation checklist, keep in mind, however, that not every volunteer needs all this information. Tailor your presentation to the volunteer's needs and develop a written plan to follow.



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Step 2: Conducting Orientation

- **When:** It's essential that orientation be held very soon after the new volunteer is recruited. In some cases, orientation for groups of new volunteers may be scheduled on an on-going basis. For example, orientation sessions for new volunteers might be scheduled at the county level at regular intervals. New volunteers can simply be given the schedule of orientation sessions and register to attend one.

More often, special orientation sessions will need to be scheduled as new volunteers are recruited. Orientation may take the form of small group meetings or individual visits. One advantage of group meetings is that new volunteers begin to form networks for support and encouragement. They also gain a sense of being part of a larger effort. If orientation is being conducted for a group, be sure to include some get acquainted activities.

- **Who:** You may conduct the orientation yourself, or involve others in presenting the information. Some others who might help with orientation are members, experienced volunteers, salaried staff, or other professionals.
- **What:** Each new volunteer should receive an orientation packet. The packet should include:
 - Agenda for orientation.
 - List of other volunteers in similar positions.
 - List of individuals who can act as resources or provide information.
 - Forms and paperwork to be completed.
 - Copy of volunteer's preliminary role agreement form and a blank copy of the role agreement form.

Try not to overload volunteers with materials at the first session. Decide which materials need to be explained immediately and which can be discussed at future training sessions.

At the end of the orientation session or soon after, a final role agreement form should be completed. This form should be signed by the volunteer, the trainer, and the salaried staff member. Copies of the agreement form should be kept by each person signing it. This becomes the volunteer's contract.

Step 3: Follow-Up

A personal visit, phone call, or note soon after orientation is vital for several reasons:

- It builds a sense of belonging and teamwork.
- It provides the volunteer with an opportunity to ask questions and seek clarification.
- It stimulates the volunteer to begin work on his/her task.
- It sets the stage for future training.

As volunteers begin work in their new roles, it is important that open, on-going communication be maintained.



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Use this worksheet to identify specific information a new volunteer will need for your specific program.

Program Policies and Procedures

A few significant highlights of our program's state and county heritage are:

In summary, our county program's philosophy is, stated briefly

State and county policies which will affect my volunteer efforts are . . .

confidentiality: _____

training sessions: _____

staff meetings: _____

volunteer association: _____

assignments: _____

resignation: _____

use of resources: _____

performance evaluation: _____

affirmative action: _____

liability: _____

other: _____

Diagram (or attach a diagram) of your organizational chart or program system here.



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Orientation Checklist for Supervisors of Volunteers

1. The volunteer's relationship within the particular program unit
 - a. Explain statewide program issues
 - b. Discuss mission, purpose, and scope of the program unit
 - c. Explain the responsibilities of the program committee
 - d. Share organizational chart
 - e. Describe types of volunteers involved in program
 - f. Give a brief history of the program
 - g. Explain the various 4-H delivery modes in the county
 - h. Provide a glossary of terms
2. The volunteer's position responsibilities
 - a. Give volunteer current position description
 - b. Discuss individual duties and responsibilities
 - c. Provide detailed instructions, if applicable
 - d. Indicate availability of resources and other help when needed
 - e. Provide learning aids and procedural manuals
 - f. Explain procedures for obtaining and caring for property
 - g. Explain relationships to other agencies
 - h. Stress security of confidential information and public trust
 - i. Use volunteer role agreement if you find it helpful. Adjust responsibilities to the individual situation, using the role agreement.
3. Skill Assessment
 - a. What other training or experiences have you had that prepared you for these tasks?
 - b. What skills do you **already** have?
 - c. What skills do you need or feel would be helpful to be effective and satisfied in this role?
 - d. What barriers exist in your functioning in this role? What resources do you need to function?
4. The relationship of the volunteer's work to that of others
 - a. Tell the volunteer who his/her supervisor is and who, if anyone, reports to the volunteer
 - b. Discuss the responsibilities and rights in volunteer relationships
5. The physical layout and available facilities
 - a. Show volunteer his/her own work area
 - b. Show volunteer classrooms, elevators, rest rooms, water fountain, etc
 - c. Discuss eating facilities, coffee machines, etc



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6. Other staff
 - ___ a. Tell other staff the new volunteer's position
 - ___ b. Briefly mention duties of each person introduced to volunteer
7. Office management and operations
 - ___ a. Explain office procedures
 - ___ b. Discuss office practices, procedures, and policies
 - ___ c. Explain any unusual working conditions, hazards, etc
8. Volunteer benefits
 - ___ a. Discuss liability and other insurance coverage
 - ___ b. Explain travel regulations, reimbursement, and procedures
 - ___ c. Discuss use of program owned automobiles
9. Training programs available
 - ___ a. Explain in-service education and training
 - ___ b. Indicate policies regarding other staff development opportunities (e.g., discounts for classes and workshops)
 - ___ c. Discuss future goals with volunteer
10. Ground rules for staff operations and performance.

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