



Volunteer
Toronto

Orientation & Training

Resource Guide & Workbook

Compiled by the Engaging Organizations Department

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Using this Resource Guide & Workbook

The Orientation & Training resource guide & workbook has been compiled by Volunteer Toronto to help community groups, non-profits and charitable organizations with the basic tools to effectively maintain and value their volunteers.

Each resource has been selected to give you an idea of the straightforward needs of each step of the process. It is important to remember that these are guidelines informed by best practices; you can adapt them to your situation as needed.

Orientation & Training

When volunteers are new to your organization, you should conduct an Orientation to get them adjusted to your organization's processes and systems. They should receive initial training to help them succeed in their role, but it doesn't have to stop there, as you can provide workshops, refreshers and skills development training throughout their experience.

This workbook will explore tips and techniques for being effective volunteer trainers, as well as information on planning and preparing your orientation and keeping volunteers learning throughout their engagement. There are two main sections for this workbook:

Orientation

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Training

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What is Orientation?

A volunteer orientation helps volunteers feel welcome, it clarifies the relationship between the volunteer and the organization and it provides information and context. Every volunteer should receive an orientation to help them prepare for the role and become comfortable with the organization and their team. The information they receive will also help them be stronger organization ambassadors. An orientation to your organization not only makes new volunteers feel welcome, it can also be a great way to establish boundaries, clarify roles and explain policies.

Why is an orientation important for new volunteers?

Helps volunteers feel welcomed, know how their role fits in to the overall structure of the organization and contributes to the organization's mission

What information should be included in an orientation?

Give volunteers information about the organization's mission, vision, values and history

How should the information be presented?

Groups, one-on-one, virtual, handbook

ORIENTATION VARIETY

Get creative with your orientations! You may have to do it multiple times throughout a year or program, so find ways to make it fun and engaging - encourage volunteers already with your program to suggest ideas for improving and energizing orientation.



Components of Orientation

A volunteer orientation should include three components:

Social

- Introduces volunteers to other volunteers and staff
- Welcomes volunteers to the team
- Helps to place volunteers into the broader scope of the organization, especially in terms of other staff, volunteers, senior management and structure
- Orients volunteers to the organization's culture/etiquette (e.g., dress code, where they can find/store food and drinks, whether people take breaks together, etc.)

Examples: Icebreaker-style activity, walking tour through facility, mix-and-mingle event

Position

- Gives volunteers more information about their specific role
- Provides a deeper understanding of how that position contributes to the mission
- Lays out position expectations – standards of performance, deadlines
- Explains volunteer evaluation procedure (when, how, how often)
- Defines boundaries of the position & consequences for crossing the boundaries

Examples: Reading through description point-by-point, activities on different parts of the handbook

System

- Describes the history and structure of the organization
- Gives context to the volunteer's role in the organization's work
- Shows the "bigger picture" of the organization in relation to the volunteer
- Covers relevant policies and procedures
- Includes signing and/or collecting of necessary paperwork

Examples: Senior leadership staff-person talking about institutional history, table or station for signing documents

Formats for Orientation

In-person orientation can be done individually on a volunteer's first day or in groups, at a set time. The in-person aspect is a necessary part of social orientation, allowing you to introduce volunteers to their peers and others in the organization.

The volunteer handbook is another important aspect of orientation as it allows volunteers to refer back to different information as is necessary – specifically policies, procedures and other contextual information about the organization.

Planning Orientation

- Make sure you cover the social, position and system orientations
- How the information is presented will depend on the organization and volunteer role
- Organizations with high volunteer intake can do regular group orientations for all volunteer programs combined, projects recruiting all of their volunteers at once can do a more specialized group orientation at the beginning of the project, and smaller organizations may have to do one-on-one orientation
- Orientation can be done in person (group setting, one-on-one) or online (pre-recorded online learning modules or live webinars)
- Provide written orientation materials so that volunteers can continue to reference them after the orientation
- Leave plenty of time for volunteers to ask questions
- You can extend the orientation by assigning an experienced volunteer to be a mentor to new volunteers
- It can be difficult to provide an orientation for certain volunteers, such as special event volunteers or those who work from home. Think about different ways to deal with these challenges - *Written orientation package; For events, you can train volunteer leaders to provide orientation to groups*

Use this chart to help you determine ways to cover each of these areas of the orientation:

Topic	Method
Meeting supervisors/staff/other volunteers	
Learning about organization history	
Filling out paperwork/forms	
Understanding boundaries	
Understanding requirements	
Learning about evaluation plan	
Getting to know facility/activity space	

Volunteer Handbook Checklist

Part of planning for volunteer involvement is ensuring your volunteer program has systems, policies and/or procedures in place for volunteers. Creating a volunteer handbook will help you and your volunteers grasp the full extent of the organization's programs and effectively serve its goals. The information you include in your volunteer handbook will depend on the way your organization approaches volunteer involvement and the nature of the roles that volunteers will be fulfilling. Below are some of the things that you should consider including:

- Mission, Vision, and Values**
Your organization's mission, vision and values will help new volunteers gain a better understanding of the goals and purpose of your organization, and how their contribution to your organization will make a difference.
- History of the Organization**
Knowing the history of your organization can help volunteers understand the context of the work they will be doing, the importance of your organization in the community you serve, and the impact your organization has had over the years.
- Structure of the Organization**
Information about the structure of your organization can help volunteers understand where their role and their program fit into the bigger picture. It will help them understand the reporting structure of the organization, and who else is involved in the development or delivery of the programs they contribute to.
- Programs and Volunteer Roles**
Information about your organization's current programs, and the volunteer roles within those programs, can help volunteers identify the roles that would be a good fit for them. It also provides them with the information they need to accurately represent your organization in the community.
- Policies and Procedures**
Policies and procedures relevant to volunteer involvement in your organization can be included in the handbook itself, or information about where they can be found when volunteers need to refer to them can be provided. This will help volunteers understand both their rights and their responsibilities as a volunteer in your organization.
- Volunteer Code of Conduct**
Including a volunteer code of conduct in your handbook will help volunteers understand what sort of behaviour is expected of them, and what the consequences are if they don't meet those expectations.
- Contact Information**
Including the name and contact information of the people who supervise and support volunteers will help the volunteers feel supported by the organization and will make volunteer involvement run more smoothly for everyone involved.

What is Training?

Training is an opportunity to:

- Provide volunteers with specific information about their role
- Ensure that volunteers have the necessary knowledge and skills to perform their roles safely and effectively
- Expand a conversation about volunteer boundaries or other important topics
- Provide volunteers with learning related to their personal or professional goal

Training volunteers should be ongoing, proactive and reactive. More high-risk roles will usually require more ongoing training. For instance, if a volunteer is engaged to provide support to clients with serious illnesses, training should be provided up front and refreshed throughout the volunteer's engagement on the necessary knowledge of maintaining safe and healthy practice with these clients.

Adult Learners

- Tend to be internally motivated, self-directed, knowledgeable and experienced
- Are goal and relevancy-oriented
- May require different techniques than training youth audiences
- Want to be respected and expected to understand
- Sometimes want to jump ahead
- Prefer practical learning – learn by doing, scenarios, role playing

Learning Types

Visual	prefer to learn through being shown or seeing things
Auditory	prefer to learn through being told or hearing things
Verbal	prefer to learn by communicating in their own words
Physical	prefer to learn by doing and take in knowledge through movement
Logical	require rational explanation and analytical steps
Social	prefer to work towards solutions in a group setting
Solitary	prefer to work towards solutions on their own

Use a variety of approaches to help every learner!

Training, in various forms, should be provided regularly throughout the volunteer experience – whether monthly in-person trainings or online offerings. Some training can or should be mandatory while others can be optional and more beneficial for the volunteer than the organization.

Training Self-Assessment

Think about a volunteer role in your organization and answer the following questions.

Volunteer Position Title:

What skills and information do volunteers need to learn?	
How do you currently teach volunteers these skills and information?	
Do you face any challenges training volunteers? Are any training needs going unmet?	
What are some new strategies and possible solutions to improve your training?	

TIP: If you're having trouble answering these questions, you may need to rethink your training strategy. This workbook will help you determine new ways to better prepare and train your volunteers.

Now think about your training plan for your whole volunteer program:

Is all of your training role- or organization-related?	
What else could you offer as a benefit to volunteers to improve their social and/or professional skills?	
How can you involve partners and other staff in the training process?	

4 Easy Ways to Keep Volunteers Learning

Orientation shouldn't be the end of your volunteer's learning journey. Training and learning opportunities allow your volunteer to continue to grow throughout their engagement with your organization. These four easy ways of rethinking volunteer learning will help you and your volunteer program succeed.

1. Think Ahead

Reconsider what training looks like. Training doesn't always need to happen in the classroom; plan ahead to make sure that learning continues after the workshop is over. For example, you could set up a buddy system to pair up your new volunteers with more experienced ones, so that volunteers can learn on the job through observation and hands-on practice.

2. Start Where You Are

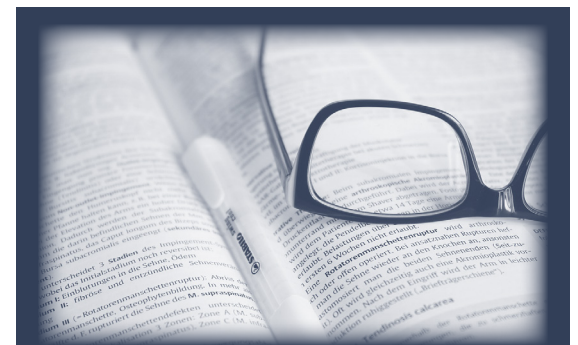
What resources and opportunities do you already have? Do you have staff members who can share expertise in particular topics? Do you have experienced volunteers who would like to share their insights? Do you have a partnership with another agency that might be willing to team up for training sessions? Set realistic goals to increase continuous learning opportunities by taking advantage of your current resources.

3. Mix it Up

Use lots of different training strategies to help your volunteers learn. Webinars, work groups, readings, mentoring, learning aids, and peer to peer coaching can all supplement more traditional training sessions.

4. Let it Happen

It takes more than just training for your volunteers to apply the things they've learned. The learning process continues after formal training is over, and it requires ongoing support. Make sure that volunteers are encouraged to practice their new skills, that they have plenty of opportunities to give and get feedback, and that they have the support they need while they adjust to changes.



ONGOING TRAINING
Ongoing training is vital to meeting the professional and personal goals of volunteers while meeting the changing needs of your organization and your community. Always consider a variety of topics and methods to keep volunteers learning!

The Trainer's Toolbox - Sample Activities

Warm-Up Activity: Meet the Neighbours

Goals: <ul style="list-style-type: none"> Participants meet the others in the session Share information about themselves and their objectives for the session in a dynamic way Walk about helps to decrease tension 	Materials needed: <ul style="list-style-type: none"> Paper and pen
Method: Ask all participants to stand up, or come to the centre and give the following instructions: “Please find someone you don’t know (or don’t know well) and introduce yourself. Share 3 things: <ul style="list-style-type: none"> your name something we don’t know about you one objective you have for today Please repeat this process with three people. When you are meeting the third person, be sure to note what they are saying as you will be introducing them to the group.” Invite participants to introduce the third person to the group.	
Variation: <ul style="list-style-type: none"> People may remain seated if mobility is an issue People could ask each other their names and questions relevant to the session, for example in a volunteer position information session people could ask each other what type of position they are looking for 	
Your Turn: In what context can I apply this type of activity? What do I need to consider regarding the learners? What knowledge, skills, and attitudes could I communicate using this exercise?	Notes:

Warm-Up/Energizer Activity: Silly Smiles

Goals: <ul style="list-style-type: none"> Meet others in the session quickly Increase the energy level Move around the space to get the physical/mental kinks out 	Materials needed: <ul style="list-style-type: none"> Space to move around the room quickly
Method: <p>Ask people to introduce themselves to every person in the room with a handshake and their first name. Key element is that this MUST be done while smiling as broadly as possible and maintaining that smile until the completion of the exercise.</p> <p><i>Not suggested with very large groups – probably the maximum would be 20 people.</i></p> <p>Upon completion of the exercise, take a few moments to ask:</p> <ul style="list-style-type: none"> How did that feel? (Responses could include: “my face hurts,” “it feels silly to paste a smile on my face for so long”) What did you notice happening in the room? (Responses might include: noise level increased, energy went up, temperature of the room changed, people felt more in charge of the space) 	
Your Turn: <p>In what context can I apply this type of activity?</p> <p>What do I need to consider regarding the learners?</p> <p>What knowledge, skills, and attitudes could I communicate using this exercise?</p>	Notes:

PLANNING TRAINING

Needing to provide training that fits a volunteer’s schedule is an ideal opportunity to explore online and self-directed learning. Encourage volunteers to suggest topics to cover and find new ways of bringing that information to your volunteers.

Energizer Activity: Stand Up If...

Goals: <ul style="list-style-type: none"> To learn more about each other To re-energize the group; get the group to move around Can be used as a warm-up 	Materials needed: <ul style="list-style-type: none"> List of “Stand up if...” statements 		
Method: <p>Tell the participants you will be reading out a list. Ask them to stand up if any of the following pertains to them. You can also start with everyone standing up and ask them to sit down if... You can adapt the statements to the topic of your session, or use statements that are for fun or a mix of both. Some of these can include:</p> <p>Stand up if...</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; vertical-align: top;"> <ul style="list-style-type: none"> You’ve volunteered before You’re wearing red You love winter You train volunteers </td> <td style="width: 50%; vertical-align: top;"> <ul style="list-style-type: none"> You have a picture in your wallet You’ve used warm ups in sessions before You play a musical instrument You like to sing Karaoke </td> </tr> </table>		<ul style="list-style-type: none"> You’ve volunteered before You’re wearing red You love winter You train volunteers 	<ul style="list-style-type: none"> You have a picture in your wallet You’ve used warm ups in sessions before You play a musical instrument You like to sing Karaoke
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Variation: <ul style="list-style-type: none"> People may clap their hands or raise their hand if mobility is an issue May also be done by putting participants in a line and asking “Step forward if...” 			
Your Turn: <p>In what context can I apply this type of activity?</p> <p>What do I need to consider regarding the learners?</p> <p>What knowledge, skills, and attitudes could I communicate using this exercise?</p>	Notes:		

Adapted from “Stand up if...” exercise from Building Groups and Warm Ups, Discovering Life Skills, v 1, p 195, YWCA Toronto

Brainstorming Activity

Goals: <ul style="list-style-type: none"> To give participants the opportunity to problem-solve in a safe environment To give participants an idea of some of the situations they may encounter and offer some options To give the group the opportunity to share wisdom and experience 	Materials needed: <ul style="list-style-type: none"> Scenarios that reflect possible situations participants may encounter (number of groups = number of scenarios) Flipchart paper Markers
Method: <p>Divide participants into groups. Hand a scenario to each group and tell them to brainstorm possible solutions to the scenarios and to list these on the flipchart paper.</p> <p>Participants are invited to share their scenarios and then to share the options they generated.</p> <p>Facilitator adds supplementary information to the options generated by the group.</p>	
Variation: <ul style="list-style-type: none"> Each group may do the same scenario. This may bring out the various perspectives people may adopt when problem-solving 	
Your Turn: <p>In what context can I apply this type of activity?</p> <p>What do I need to consider regarding the learners?</p> <p>What knowledge, skills, and attitudes could I communicate using this exercise?</p>	Notes:

Knowledge Transfer Activity

Goals: <ul style="list-style-type: none"> To review content or concepts of the sessions Encourage participants to share knowledge 	Materials needed: <ul style="list-style-type: none"> Paper or index cards Pens
Method: <p>Give participants a piece of paper or an index card.</p> <p><i>Alone:</i> Ask them to note the key information or concepts they learned that will help them when they are back on the job.</p> <p><i>In pairs:</i> Compare notes, add concepts that you don't have.</p> <p><i>Large group debrief:</i> Ask questions about the exercise. What concepts were noted? Did any come up more often than others?</p>	
Variation: <ul style="list-style-type: none"> Use a form of "musical chairs" (except without the chairs!) to get people moving and when the music stops, they share their concepts with the people they are closest to. 	
Your Turn: <p>In what context can I apply this type of activity?</p> <p>What do I need to consider regarding the learners?</p> <p>What knowledge, skills, and attitudes could I communicate using this exercise?</p>	Notes:

Adapted from "Training makes cents incorporated" Christie Sterns, "Idea Shuffle" & "At the End of the Day" www.trainingmakescents.com

Closing Activity: String/Yarn Exercise

Goals: <ul style="list-style-type: none"> Practice the skill of giving positive feedback Develop group cohesion End a session on a positive note 	Materials needed: <ul style="list-style-type: none"> Large enough space for people to stand in a circle, side-by-side A ball of string or yarn with one end tied into a loop
Method: <p>Get people to form a circle and ask each person to select someone to whom they wish to give a piece of positive feedback. Once you have chosen the person you wish to give feedback to, tell them you are going to throw the ball of string/yarn to them and that they are to wrap it to hold a bit of the yarn, receive your feedback and then select another to continue the process with. The exercise continues until everyone has had a turn giving and receiving feedback.</p> <p>As facilitator, make sure you select the unexpected candidate who, for whatever reason, is less likely to receive feedback quickly.</p> <p>As a closing exercise, draw attention to the fact that everyone in the group has something to contribute and that being a member of the group automatically creates invisible connections to everyone else. The string/yarn is a demonstration of how those invisible bonds can be created, and also how people appreciate receiving positive feedback as a way of creating group cohesion. This exercise is usually used to conclude a training session and participants are then asked to remove the string/yarn around their wrists, place it on the floor, step away from the shared experience and complete whatever evaluation is required to end the session.</p>	
Variation: <ul style="list-style-type: none"> Can be used as a way of beginning a training session Can be used as a way of saying goodbye to a longtime group member or at the end of a project 	
Your Turn: <p>In what context can I apply this type of activity?</p> <p>What do I need to consider regarding the learners?</p> <p>What knowledge, skills, and attitudes could I communicate using this exercise?</p>	Notes:

Being an Inclusive Facilitator

1. **The inclusive facilitator** has an understanding of disability and how it manifests.

Disability can:

- Be visible and “invisible”
- Include physical (e.g. use of wheelchair), development (e.g. autism spectrum), learning (e.g. dyslexia), chronic illness (e.g. diabetes), mental illness (e.g. mood disorders)
- Have varying degrees of severity
- Have varying degrees of permanence

2. **The inclusive facilitator** works with the 4 principles of the Accessibility for Ontarians with Disabilities Act (AODA) – Dignity, Independence, Integration and Equal Opportunity.

3. **The inclusive facilitator** utilizes Universal Learning Design to improve the session for everyone.

Universal learning design is a framework for designing curricula that enables all individuals to gain knowledge, skills and enthusiasm for learning.

- *Multiple means of representation:* Give learners various ways of acquiring information and knowledge
- *Multiple means of expression:* provide learners with alternatives for demonstrating what they know.
- *Multiple means of engagement:* Provide different ways to motivate, stimulate learner.

4. **The inclusive facilitator** understands different ways that people learn:

Using the senses – seeing, hearing, touching, feeling & tasting

Using different processes – understanding by reading, by moving, by copying, etc.

5. **The inclusive facilitator** ensures that the work gets done, but also facilitates a climate of collaboration and trust. The process of accommodation occurs before, during and after sessions or meetings.

Being an Inclusive Facilitator

Take a look at your training plan to determine what's accessible and what possible barriers may exist:

Training Plan	What's accessible	Barriers	What can be added, removed, or changed to improve accessibility
Materials How is the information conveyed?			
Environment (room, building, geographical location)			
Activities			
<i>Write your own</i>			

ACCESSIBLE TRAINING

Considering accessibility when training is necessary to ensure that everyone can understand and learn the information you're teaching. By providing alternatives for different learning types, you're giving everyone a fair chance to learn and excel.



Enhance your Workshop Exercise

Think of a presentation or exercise that you use in one of your workshops or that you have participated in and complete the following exercise.

Skill/ability/knowledge to be trained	Current method of presentation and participant expression (choose and/or add)	Alternatives for different learning types
	Lecture Demonstration Single exercise Group work & reporting Video Podcast Skit / role play Case study Handouts Large group discussion Pre-assigned readings Drawing Collage Writing	

Facilitator's Accessibility Checklist

Please check the box that best describes the practices in your organization. Note any comments that may help you determine ways to better meet the accessibility needs of your volunteers.

	Yes	Some-what	No	Comments
Before the Workshop				
Our registration form asks participants about accommodation needs				
We conduct needs assessments before the workshop				
If accommodations are requested, they are clarified with participant with a phone call or email				
Material is made available to participants who request it at least one week in advance				
A confirmation email is sent to participants outlining the general activities they will be invited to participate in				
The registrations are limited to numbers that allow comfortable space in the training room				
The location is verified for sufficient outlets to accommodate assistive devices				
The room is set up to ensure that there is space to get around easily				
Tables are easily available in the room and can be moved and adjusted				
Our staff and volunteers are trained to welcome and serve participants with disabilities				
Reserved signs are put on seats that are to be occupied by participants with disabilities (by the door, by a plug, the front of the room, etc.)				
Wires and power cords are taped down and secured every time				

	Yes	Some-what	No	Comments
Before the Workshop (continued)				
The building and room are accessible and easy to get to				
We have appropriate signage using universally recognized symbols				
We have people on hand who to assist participants and act as note takers				
<i>Add your own</i>				
During the Workshop				
Refreshments are readily available				
An introduction setting the tone for inclusive, safe and respectful environment is communicated				
Participants are informed about the role and the correct way to interact with support persons, service animals				
Participants are informed of the communication guidelines that will enable all participants to be heard				
Exercises are explained clearly and some variations are also suggested				
Documents are in clear language and in various formats				
Breaks are inserted at regular intervals				

	Yes	Some-what	No	Comments
During the Workshop (continued)				
During individual activities and group work facilitator circulates to support all participants in their interactions				
Large print version of the PowerPoint presentation and other materials are on hand in case they are needed				
<i>Add your own</i>				
After the Workshop				
The evaluation is accessible and made available in various formats				
A summary with the main points of the session is sent out				
Participants with disabilities are invited to provide feedback on their experience and any improvements that are needed				
<i>Add your own</i>				

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Next Steps

After providing orientation and training, your next steps are:

- Managing, supporting and evaluating volunteers
- Retaining, recognizing and motivating volunteers

To continue your volunteer journey, there are a number of other workbooks created by Volunteer Toronto to assist every step of the way:

- **Planning for Volunteer Involvement** – preparing and planning for volunteer recruitment, establishing policies and procedures
- **Volunteer Recruitment** – how to write and post role descriptions, how to attract specific audiences
- **Volunteer Selection** – interviewing and making the right decisions, communicating with potential volunteers
- **Volunteer Retention & Recognition** – recognizing and motivating volunteers, planning for volunteer succession
- **Giving Volunteers Feedback** – different ways to provide feedback to volunteers, dealing with difficult volunteer situations and conflicts

This Resource Guide & Workbook has been compiled by the Engaging Organizations Department of Volunteer Toronto, Copyright 2015

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