Volunteer Kentucky!
Lesson Plan
Session #3: Educate

Generating, Educating, Mobilizing and Sustaining

Learning Objectives:

The participants will:

- *distinguish* elements of an effective new participant orientation program.
- *examine* organizational procedures required for client and participant protection.
- *identify* resource elements critical for a positive individual experience within the organization.
- *design* learning situations for continued participant skill development.

Resources:

- GEMS Model of Volunteer Administration
  http://www2.ca.uky.edu/agc/pubs/CLD2/CLD23/CLD23.pdf
- KELD Publication Series http://www2.ca.uky.edu/kccl/keld.php
- VRKC Taxonomy http://nextgeneration.4-h.org/volunteerism/vrkc/
- National Framework for 4-H Volunteerism Assessment
  http://www.uwex.edu/ces/4h/ncrvd/ref/NLPVolunteerism.cfm
- Volunteerism for the Next Generation http://www.4-h.org/resource-library/professional-development-learning/4-h-volunteer-development/

Session Goal:

To develop the educational processes that ensure a successful participant experience and continued service to the organization.

Pre-Program Preparation / Materials:

- Secure laptop computer, projector and wireless access capacity.
- Download PowerPoint presentation *"Volunteer Kentucky! Educating Members, Volunteers and Leaders"*
- Review *"CLD2-7 Educating Members, Volunteers and Leaders in Community"* fact sheet for content delivery background.
  (http://www2.ca.uky.edu/agc/pubs/CLD2/CLD27/CLD27.pdf)
- Prepare copies of *"CLD2-7 Educating Members, Volunteers and Leaders in Community"* for each participant.
- Solicit sample *Orientation Packet* with organizational letter and materials for each organization.
- Prepare copies of the participant worksheets--- *Project Resource Inventory activity sheet* and *New Member Orientation Letter* (if applicable to group.)
- Flip Chart and markers

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Cooperative Extension Service | Agriculture and Natural Resources | Family and Consumer Sciences | 4-H Youth Development | Community and Economic Development

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Review from Previous Session:

Ask   Encourage participants to share the results from the previous session's homework assignment.

(This will become a component of their culminating project.)

- Identify and articulate a Needs Assessment issue and conduct a SWOT Profile with your organization and gather the input of at least 15 people.
- Create a Volunteer Position Description for a high need or new position in your organization.
- Develop a Volunteer Recruitment Plan for your organization.

Background:

Share   Read the following excerpt:

"Educated, empowered members, volunteers, and leaders are more effective in serving any community organization. Educating adds stability, quality and effectiveness to organizations and its programs. Members, volunteers and leaders who understand their duties, roles and responsibilities will not only serve the organization more effectively, but also the clientele with whom they have contact. But all too often, little attention is given to helping a new member, volunteer or leader understand the "big picture" profile of the organization, its purpose, as well as the individual's service opportunities."

Introductory Activity:

Ask   Pose the following discussion questions:

- *"You just began volunteering for a new organization; what questions would you have as a new volunteer?"*
- *"Why would a new member be reluctant to ask questions?"*
- *"If an organization provides excellent volunteer opportunities for _____ _____ (insert the mission statement), what would you do to make new volunteers feel welcome and become engaged in service?"*
- *"What information should be shared with a new member who is joining or a new volunteer that is beginning to serve the organization?"*

Ask   Encourage participants to respond with different ideas in order to introduce the concept of differences in current and future roles in the organization.

Respond   Reply by reading the following:

"Educating, empowering and equipping an organization's volunteers adds stability, quality and effectiveness to the organization and the programs it provides."

Educated, empowered members, volunteers, and leaders are more effective in serving any community organization.

Objective 1: Distinguish elements of an effective new participant orientation program.

Share   Read the following points from the Fact Sheet CLD 2-7:

"*The initial step in educating is orient. Orientation provides an overview of the organization's programs and activities, policies, procedures and programs. Additionally, the roles and responsibilities of paid and volunteer staff, organizational leadership structure, and ways that individuals can serve the organization should be covered. Orientation should be presented to all newcomers; both paid and volunteer.*"

Learning Activity 1.1:

Discuss   Divide the participants into small groups of people from similar organizations. Provide this scenario for group discussion:

"You need to develop orientation packets that will introduce new volunteers to your organization. Orientation packets should provide an overview, introduction and any supporting materials that might answer volunteers' questions regarding your organization, as well as ways in which members, volunteers and leaders can be involved. You decide to provide an orientation letter with the packet. Provide copies of the example "Who are the _____volunteers?"

Utilize the sample letter to create your own orientation letter. Evaluate the letter to ensure that it contains the following orientation components:

- Does the language make new volunteers feel welcome? What additional items could be included to make them feel welcome and informed?
- What is the mission of the organization?
- Would you understand the culture of the organization from the information included in the letter?
- Is the focus of the programs offered by the organization clearly articulated?
- Do you find opportunities to be of service and be involved in this organization?
- Is the relationship between members, volunteers, leaders and paid staff outlined clearly?

Ask   Pose the following questions:

"What other items would you provide in your new volunteer orientation packet?"
(For example, you might include an annual report, pictures, an officer chairman directory, a membership brochure, a promotional incentive such as a pen from your organization, etc.)

"How would you present the orientation packet information?" (Packets could be distributed at a meeting, through a conversation with a mentor or new recruit, distributed through the mail or at an orientation luncheon for new members).

Objective 2: Examine organizational procedures required for client and participant protection.

Share   Read the following information from the Fact Sheet CLD 2-7:

"One of the most unfortunate aspects of group participation in public projects and activities is the issue of liability or risk resulting from participation. Many organizations often overlook or ignore making members, volunteers and leaders aware of risk management strategies. In the protecting phase of the education process, volunteers learn about risk management strategies such as appropriate and acceptable behaviors, conflict resolution, personal liability and confidentiality issues. Risk management education for members, volunteers and leaders includes explaining the concept of risk management, developing an awareness of potential liabilities, alternative methods of insuring losses, and developing procedures to minimize liabilities. Risk can focus on overall organizational protection or specific event risks for identifying necessary procedures. Client protection examples include a signed photo release on a membership form, allowing individual photos to appear in print or web-based media, a 'hold harmless' clause on an enrollment form, liability shields or other procedures related to specific situations."

Learning Activity 2.1:

Identify   Describe an activity involving volunteers and clients conducted by your organization. Assess the risks and liability inherent to that activity.
- What potential risk or liability issues could the organizations face with this project?
- What steps should the organizations take in educating volunteers to reduce risk?

Risk/liability potential
- o Discuss appropriate and acceptable behavior.
- o Identify areas on the property that have a higher risk for individual injury.

Potential steps to minimize liability
- o How to handle difficult situations and confidentiality issues.
- o Orienting and teaching all volunteers.
- o Consider organizational liability policy or site liability policy.

Objective 3: Evaluate resource elements critical for a positive individual experience within the organization

Share   Read the following excerpt:

"Leaders, members and volunteers should not be expected to provide their own personal resources in order to serve the community or organization. The organization should identify the specific resources necessary to allow the participant to be successful at all levels of participation: implementing leadership roles and responsibilities,

Members, volunteers and leaders who understand their duties, roles and responsibilities will not only serve the organization more effectively, but also the clientele with whom they have contact.

*community volunteer service projects for desired impact or simply member education activities. Resource areas can include **human** resources (identifying other individuals who can provide support, skills, or services); **financial** resources such as the identification of sources of funding, budgetary guidelines, and fund-raising strategies; **education or technology** resources such as curriculum, computers, software packages, internet access, wireless service or **facility** resources, such as meeting room space."*

What resources may be provided by sponsors or cooperating organizations? As an action plan is developed, the volunteer administrator should educate members, volunteers and leaders regarding resources available for use to ensure a positive experience in the organization.

Learning Activity 3.1:

Ask

Encourage each group representing organizations with similar missions or serving similar audiences to identify the resource elements required for volunteers to complete a specific project or activity, using the following scenario:

"The County Historical Society plans to hold a Spring Community Quilt Show in conjunction with the community's annual Spring Festival."

Using the **Project Resource Inventory worksheet**, ask small groups to identify the human, financial, technology or facility resources that the organization should provide for project success. (Examples may include):

Human: Includes project chairmen, project leaders, volunteers (such as marketing, registration, scoring, set-up, concessions, awards, etc), speakers, parents, support staff, etc.

Financial: Includes cash for awards, ribbons and plaques, refreshments, lunch, registration supplies (could be in-kind donations or sponsor donations), etc.

Technology: Such as computers for registering participants; software to prepare marketing flyers, registration sheets, judging cards; posting website information; wireless access for on-site scoring, projectors, laptops, etc.

Facilities: A large room for judging; break-out rooms for scoring, tabulations, refreshments, etc., restrooms, parking, registration area, private office space for tabulating results, kitchen for storing food supplies, concession area, etc.

Objective 4: Design learning situations for continued participant skill development

But all too often, little attention is given to helping a new member, volunteer or leader understand the "big picture" profile of the organization, its purpose, as well as the individual's service opportunities.

Share	Read the following excerpt:

"*Additional teaching or learning opportunities related to specific skills and knowledge can assist members, volunteers or leaders in carrying out their responsibilities. Additionally, teaching opportunities should be presented that will develop personal volunteer development and leadership skills. Education should be conducted in a variety of ways (individually, through group meetings, workshops, classes or on-line) and address multiple learning styles. One reason that contributes to volunteer turnover is insufficient learning opportunities.*"

"*Educational opportunities go beyond initial orientation, risk management, and resource access. Developing member, volunteer and leader skills makes the organization more effective in representing the organization throughout the community.*"

Ask	Pose the following question for group responses: "*What tools or resources could be used to educate members, volunteers or leaders?*"

Learning Activity 4.1:

Ask	Encourage participants to answer the following:

The Leadership Committee wants to add more depth to their traditional leadership programs – going beyond distribution of officer and chairmen training materials. How would you design different learning opportunities that offer skill development for both members, volunteers and leaders? Break into small groups to discuss the following questions:

- What specific knowledge or skills - beyond understanding officer/chairmen roles and responsibilities - would you select to educate members, volunteers and leaders?
- What different teaching methods could you use to meet the needs and fit the schedules of your members, volunteers and leaders?

   Example: A three-part program has been planned to enhance the skills of members, volunteers and leaders in our organization. This program includes:
- A lesson on "Effective Conflict Resolution" from the KELD curriculum Section I – to build skills for members, volunteers and leaders.
   http://www2.ca.uky.edu/agc/pubs/cld1/cld17/cld17.pdf
- A lesson for Councils and Boards featuring conflict resolution scenarios and role-play situations during the first 30 minutes, in addition to roles and responsibilities training.
- Website postings of all conflict resolution materials and roles and responsibilities for on-line reference.

"Educational opportunities go beyond initial orientation, risk management, and resource access.

Summary:

Share   Read the following excerpt:

> "*An organization must determine how to educate volunteers at different levels of service and stages of involvement and experience. Educating may involve getting a new volunteer off to a good start with orientation, helping volunteers manage risk by implementing prescribed risk management strategies, providing volunteers with resources for a positive experience or making continued skill education a part of ongoing support activities. Educating volunteers at all levels adds stability to organizations. Education volunteers enables and empowers members, volunteers and leaders to effectively represent, serve and lead. Including an effective education component to volunteer programs ensures that volunteers are more likely to be retained in their role and expand the outreach of the organization and its programs to audiences who would otherwise not be served.*"

Evaluation:

Review the orientation packet that each participant has created and determine if the criteria for an effective orientation packet (as identified in KELD 2-7 at http://www2.ca.uky.edu/agc/pubs/CLD2/CLD27/CLD27.pdf) have been met.

For next session:

- Choose one of the following options as your project to complete before the next session. (This should be a component of your final project.)
  - o Develop a Volunteer Orientation program for new volunteers. The Orientation could be on-line or presented to a group of people. It should be a complete, finished package including objectives and an evaluation. (A group Orientation must include a lesson plan.)
  - o Create a Development Activity for new or continuing volunteers. Include a lesson plan, objectives, a description of the target audience and an evaluation.
- Bring your Passport to each meeting in order to have credit given by the instructor.
- Stamp the passport of each attendee to signify completion of this session.
- Continue working on your culminating project.

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"Education volunteers enables and empowers members, volunteers and leaders to effectively represent, serve and lead."