



Engaging Virtual Volunteers  
Tool Kit  
Volunteer New Hampshire



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## Introduction

Nonprofits are the heart of New Hampshire – and volunteers have fueled nonprofits and other public organizations for generations. More than ever, the time, talents, and passions of volunteers are vital to meet community needs. Whether mentoring youth, providing food for the hungry, protecting endangered species, or inspiring new perspectives through the creative arts, volunteers extend organizational reach, increase financial resources, and build capacity to fulfill mission.

Volunteers have always served in many ways, but technological advancements of the last few decades have made it easier than ever for volunteers to serve meaningfully even when working remotely. While this type of “virtual” volunteering has been around for a long time, for many organizations, virtual volunteering remained the exception rather than the rule. Then, the global COVID-19 pandemic along with its associated limitations on in-person gatherings tested organizations’ engagement strategies – curtailing engagement for many and transforming it dramatically for others. The pandemic accelerated many organizations’ adoption of virtual volunteering and became the tipping point for volunteers becoming more willing and comfortable with engaging virtually.

### **What is virtual volunteering?**

Virtual volunteering has been in practice for generations and encompasses a wide spectrum of activities. In their seminal work, *The Last Virtual Volunteering Guidebook*, Ellis and Cravens define virtual volunteering as, “Activities completed, in whole or in part, using the internet and internet-connected devices.”

Expanding on that definition, this tool kit presents virtual volunteering as part of a wide spectrum of engagement activities – including offsite (remote) volunteering (such as volunteers monitoring wildlife activity in their own neighborhoods, neighborhood or trail clean ups, or food drives), direct service to clients (such as mentoring youth or visits or calls with older adults), pro bono services (such as graphic design or legal consultations), and any other opportunities where volunteers complete their engagement at least partly from a remote location and often leveraging internet based communications in some way, whether for training, check-ins, reporting, or the actual work (e.g., virtual visits with older adults or tutoring students online).

Despite a steady rise in virtual volunteering, many remain reluctant to engage volunteers virtually or lack the tools to do it well. While the strategy has been around for many decades, staff are hesitant to engage volunteers virtually, citing concerns about:

- accountability – If the volunteers aren't here with us, how can we monitor their performance?
- reliability – If the volunteers aren't even willing to come in personally, how can we be sure that they are dependable?
- risk management – If they are using their own computers, how do we protect our data and ensure that the volunteers respect organizational confidentiality?

Such concerns may stem from past experiences or from appropriate attention to risk management, nevertheless, all these matters can be addressed through best practices designed to mitigate these and other risks. Best practices for engaging and supporting virtual volunteers have been developed and refined over decades and adopting them can ensure that organizations – and volunteers – will reap the many benefits of virtual engagement. This tool kit presents a framework of best practices for engaging virtual volunteers which can be adapted and adopted by organizations of all sizes.

### **Why engage virtual volunteers?**

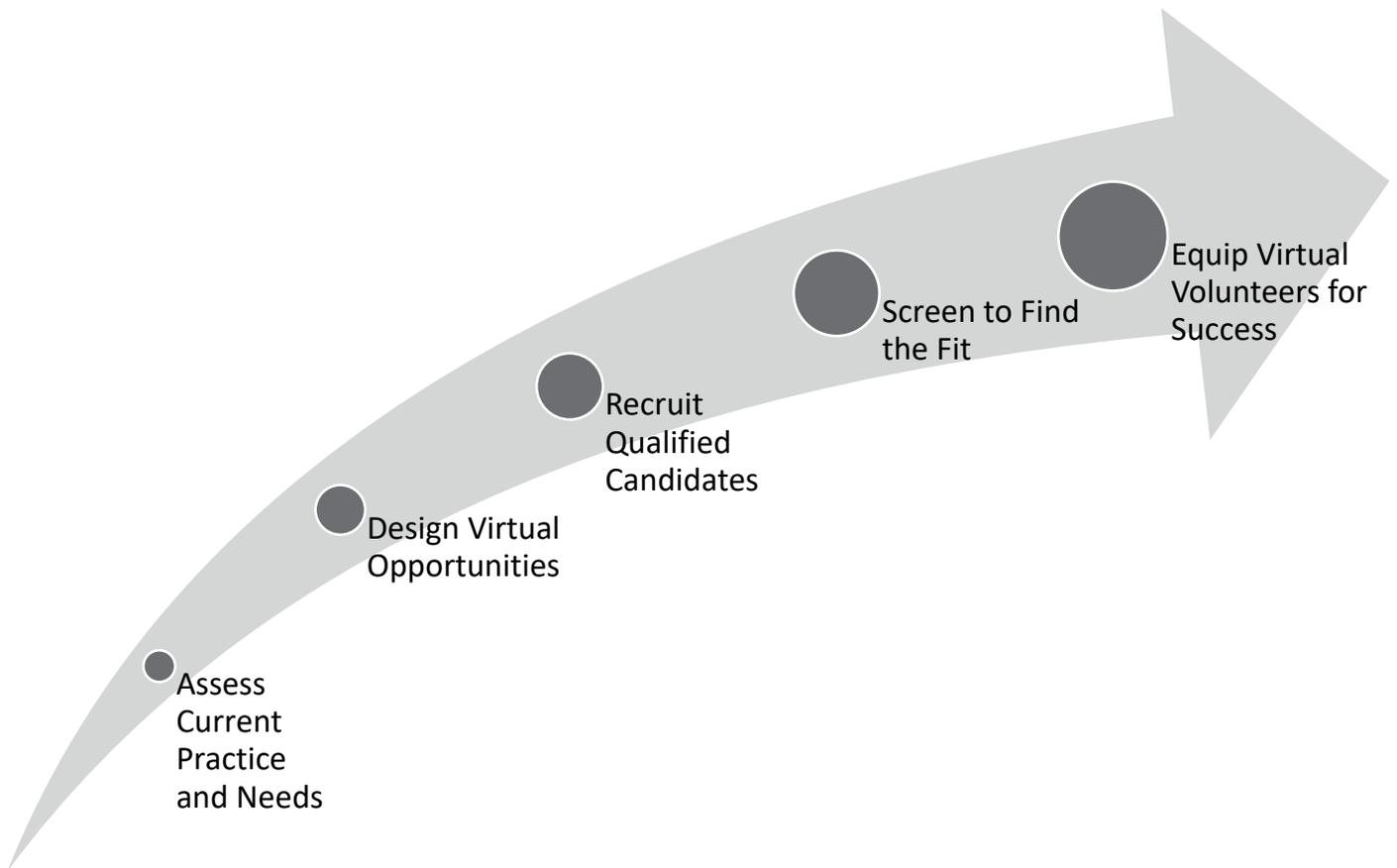
Organizations that engage volunteers virtually reap many benefits. Considering the cost of transportation, parking, and onsite office space, engaging volunteers virtually can save costs for both the organization and volunteers. Virtual volunteering can also make volunteering more widely accessible to those who care about your mission by enabling people to volunteer from any location and at many different times of day. In this way, it can also diversify the workforce by being inclusive of people of multiple physical abilities, of those who live or work in different locations, and of those with different schedule availability -- such as people who work full time, parents who might have needed to arrange childcare in order to volunteer in person, or others with scheduling challenges. Given the rural nature of New Hampshire and the impacts of winter weather, engaging volunteers virtually can be an important tactic to sustain engagement of existing volunteers and make it accessible to more remote volunteers.

Virtual volunteer engagement can also be an antidote to many of the unfortunate ripple effects of the COVID-19 pandemic. Specifically, millions have been laid off, yet have skills to share. Many will recognize that volunteering is a valuable way to keep their resumes fresh. Also, engaging volunteers virtually can keep people connected to your mission or leverage the surge of interest in volunteering as a way to help with post-pandemic recovery. In other words, while virtual engagement enables some older volunteers, for example, to remain connected while safely at home, it also makes volunteering more accessible to other volunteers who may have other obligations at work or home that preclude them from showing up in person.

## How to Use this Tool Kit

This tool kit provides information and templates to support you every step of the way towards engaging volunteers virtually. Each section includes an overview of the step, templates to guide your work, and tips for effective implementation. Together, these steps comprise the full lifecycle of volunteer engagement. To get the most out of this kit, consider these suggestions:

- Read the whole kit first then determine which tool(s) are most needed at your organization.
- Engage a task force of staff and volunteers to work through the tool kit together.
- If you are new to engaging volunteers virtually, start with just one or two new roles or adaptations of existing roles. If you already engage volunteers virtually, use the tool kit to identify gaps in practice or other areas where more intentional design and/or documentation could enhance your practice and improve the volunteer and staff experience overall.



## Assess Current Practice and Needs

Before designing any new opportunities for volunteers to engage strategically, it's important to understand your current practice. Based on the broad definition of virtual volunteering shared above, you may already be engaging volunteers virtually and not have recognized it.

Especially if you anticipate some resistance from colleagues or volunteers, identifying where you already engage and support volunteers who serve offsite or where you have already begun to institute online trainings or meetings can help make the case for more widespread adoption of virtual volunteering and build buy-in across the organization.

To that end, step one in assessing needs and identifying opportunities to engage volunteers is to review your current practice and document how you already engage or support volunteers virtually.

### **Adapting a Role for Virtual**

Interested in adapting an existing volunteer role for virtual? Consider these steps to ensure that the adaptation is done thoughtfully and effectively.

- Review the current position description (if one exists) and use the Virtual Volunteer Role Assessment form to confirm that the role can be done virtually.
- Revise the position description to address what additional skills or qualifications are needed for volunteers to complete the work virtually.
- Ensure you have the capacity and resources to develop online training, online monitoring, or other supports to ensure success.
- Secure buy-in from all staff and others involved and share the revised position description with them.
- Develop a plan for communicating the virtual option to all volunteers in the role currently.
- Determine whether they will be given the option to switch to virtual and, if so, what criteria will be put in place to determine eligibility for switching from in person to virtual (e.g., Will additional screening be expected? Additional training required?)

## TOOL: Assessment of Current Virtual Engagement Practices

Consider all the different ways that volunteers currently support your organization. Not only is it helpful to consider the breadth of volunteer roles, but also the various ways that the organization supports those volunteers, as some of that support may be occurring virtually. With that goal in mind, consider these questions and ask for input from others.

1. What volunteer work is already being completed remotely?
  - Are volunteers visiting clients at home? Do they also check in by phone or email or teleconference?
  - Do you engage pro bono attorneys or marketing professionals? In most cases, they work fully or in part from a location other than your organization's site.
  - To what extent are you screening, training, and supporting volunteers virtually?
  
2. How effective are those roles? What impact are they having on your organization?
  
3. How can you leverage these practices to expand the engagement of other virtual volunteers?
  - Are others aware of these practices?
  - How can you share these stories with others in the organization?

## Identify Needs

Volunteers today seek opportunities that are impactful, flexible, and skills-based. Meanwhile, the needs of most organizations are changing and evolving at an unprecedented pace. Today's circumstances demand a new or adapted way to do business and volunteers can help achieve that. Conducting a needs assessment can help identify new roles that serve both the volunteers and your organization. Some roles may be similar to the ways that volunteers have served at your organization for years, while others may address emerging needs such as developing virtual tours of your facility, tutoring clients on technology, or monitoring social media.

The key to ensuring that volunteer engagement is strategic is finding the overlap between what your organization needs and what today's volunteers seek out of their service. Understanding the ever-changing landscape of volunteer interests is one important step, and the other equally vital step is to understand your organization's needs and strategic priorities. Where those two results overlap is the opportunity to strategically engage volunteers for impact.



Conduct a needs assessment to document your organization's needs, opportunities, and priorities. Then, you will have the information to help identify new opportunities to engage volunteers.

### Needs Assessments

Needs assessments can take many different forms. Tailor one of these formats to best serve your organization.

- Survey staff and board members
- Facilitate discussion at department meetings across the organization
- Ask colleagues to share which items on their "to do list" have they lacked time to address
- Conduct analyses of internal processes to identify gaps and how volunteers might be able to address those gaps

## TOOL: Needs Assessment

Use this worksheet to guide an activity with colleagues – or to inform a survey or other facilitated activity designed to identify needs that could be addressed by volunteers. Convene with your staff and selected volunteer leaders. Consider advisory board members, committee leads, long-time volunteers, as well as emerging volunteer leaders. Encourage them to come with their committee or program priorities, work plans, or strategic plans as reference.

After introducing the activity, share this template and have individuals complete it first on their own. After 10 minutes of working independently, have participants regroup and report out on their ideas. Then, together, debrief and use the results to identify a few potential roles for volunteers to address some of those needs.

### **Part 1 – Work on these questions individually.**

1. What is your organization or team currently doing that you would like to increase, replicate, or expand?
2. What problems or challenges is your organization or team currently experiencing?
3. What specific skills and resources would your organization or team need to meet its challenges? To fulfill your dreams?
4. What items have you had on your “to do” list or “vision board” that you have not yet been able to address or create?
5. In what ways could your organization or team utilize a consultant or specialist to help you – now and in the future – as you work to fulfill your vision and mission?

### **Part 2 – After debriefing individuals’ answers to the above, work as a group to answer the following.**

Based on the answers above, what are three direct-service, skills-based, or leadership positions that would be an asset to you and your organization?

- 1.
- 2.
- 3.

## Design Virtual Opportunities

Successful virtual engagement begins with a volunteer role that is strategic, in other words, one that meets the needs of both the volunteer and the organization. Designing a strategic virtual volunteer position involves two important steps:

1. Assess the role to ensure it is viable for virtual engagement.
2. Develop a comprehensive position description.

Leverage the following tools to assess the ideas that emerged from your needs assessment and craft an effective position description. Well-written position descriptions can be instrumental in finding qualified people, making a good match, and setting volunteers up for success.

### Build Buy-In through Collaboration

Still need to nurture buy-in for virtual volunteer engagement among your colleagues, leadership, or volunteers themselves? Consider these tactics to help increase others' comfort with and preparation to engage and support volunteers virtually.

1. **Share stories of success.** What did you learn through the assessment of current practice that you can share to demonstrate that your organization is already engaging some volunteers virtually?
2. **Engage others in the needs assessment.** Demonstrate how engaging volunteers virtually can help address your colleagues' needs – how such engagement can help reduce your colleagues' pain points or challenges – by having them participate in the needs assessment process.
3. **Collaborate on the assessment.** Work through the assessment of the virtual volunteer role assessment together so that everyone is clear on how the responsibilities are divvied up. For example, program directors may be more open to engaging virtual volunteers if they understand that the volunteer manager will be handling online training.
4. **Co-develop position description.** Ensure that those who will be supervising the volunteers have the chance to provide input and review the position description, if not drafting it entirely.
5. **Agree on screening criteria.** Especially if the volunteer coordinator conducts initial screening of volunteer applicants, develop a screening rubric that takes into account what the supervising department considers minimum required qualifications so that the department only sees materials from qualified candidates or meets candidates who have specific qualifications.
6. **Partner to approve placement.** Either have the department supervisor conduct a final interview and approve placement or build into the placement process a probationary period so that both the volunteer and department supervisor have the chance to ensure that there's a good fit before making the placement official.

## TOOL: Virtual Volunteer Role Assessment

Use these questions to assess whether the role is **strategic**, **attractive**, and **viable** as a virtual opportunity. This form is designed to guide conversations among staff and volunteer leaders who are requesting new volunteer positions or seeking to adapt current roles for virtual to ensure that everyone involved has capacity to support volunteers in the proposed virtual role.

If you cannot answer all of these questions satisfactorily, your organization may not be ready to implement the position particularly as a virtual role.

### **Is the role strategic?**

1. What is the difference that this volunteer role will make?
2. What tasks would an individual in this role do?
3. How would this role help your organization, program, or committee achieve its priority goals?
4. When does the work have to be completed? (Not just the deadline by which the work should be completed, but does the work need to happen during traditional work hours, or can it be done during evenings or weekends?)

### **Is the role attractive?**

1. Would a volunteer find this work meaningful?
2. Would a volunteer find this work enjoyable?

### **Is the role viable virtually?**

1. Can the work be completed offsite (and if so, where)?
2. What resources would be needed for the volunteer to complete this work remotely? (Consider technology, access to information or data, equipment, transportation to a remote location, funds, etc.)
3. What skills would the volunteer need to be successful? (Consider not only skills related to the volunteer tasks, but also the communications and/or technology skills to do the work remotely.)
4. Are there additional or different security measures to mitigate risks of completing the work offsite?
5. Does the organization have the resources and training capacity to equip the volunteer for success?

6. Is there an employee or volunteer leader who has capacity to train and support volunteers in this role?
7. Which policies may need updating to accommodate virtual volunteering? (Consider risk management and information systems policies regarding which types of work require organization-issued computers with the organization's cyber security systems installed, which types of work can be conducted on personal devices but with a log in, and which types of work are publicly accessible. Consider also volunteer tracking and recognition systems to ensure that the work done virtually is meaningfully tracked and appropriately recognized.)
8. Does the volunteer handbook need updating to include virtual volunteering? (Consider whether there is a confidentiality policy, a social media policy, etc. Such policies would benefit not only virtual volunteers but all who engage as volunteers with your organization.)

## TOOL: Virtual Volunteer Position Description

Crafting position descriptions ensures that the role is meaningful and impactful. Refer to the answers to your Virtual Volunteer Role Assessment as you complete the components described below to write a comprehensive position description.

### Position Overview

First, write one or two sentences that give a compelling overview of the position and can be used in recruitment efforts. Then, draft your position description.

<b>Title</b>	A title, in and of itself, can be a motivator for volunteer recruitment. For example, “Committee Chair” is not as captivating as “Team Captain”; “Researcher” may not be as attractive as “CSI – Community Service Investigator.”	
<b>Key Responsibilities</b>	Distill the responsibilities into three or four key areas that accurately describe what is needed. Give prospective volunteers enough information to envision themselves in the position without feeling overwhelmed. Resist the temptation to put policy and procedures into the position description.	
<b>Initial Impact</b>	Initial impact is the difference that this activity/volunteer assignment makes in the near future. Consider the impact on the volunteer, on the organization itself, and on the community at large.	
<b>Sustained Outcomes</b>	Sustained outcome is the lasting impact as a result of the volunteer’s involvement. What are the long-term effects on the volunteer, on the organization, and on the community at large?	

<b>Training</b>	Volunteers value the opportunity for training. In what ways will you provide new skills, abilities, or knowledge? Will the training be delivered online?	
<b>Support</b>	Support defines what the volunteer will receive in terms of supervision, mentorship, regular meetings, check-ins, and other resources. Will training on technology be provided?	
<b>Commitment (Length, frequency, and amount of time; location)</b>	Be as specific as you can in defining the length and frequency of time for the assignment (one time, weekly, monthly) and the total time commitment for the project (hours, months, years). Include when and where the project can be done (evenings, weekends, weekdays, or anytime; over what technologies or remote locations). The more flexible you can make the assignment, the easier it is to recruit for the position.	
<b>Skills and Qualifications</b>	Define what you are seeking in terms of skills, behaviors, and willingness to learn. Don't be afraid to ask for the qualifications you need, especially around technological skills and access.	
<b>Benefits</b>	Define what is in it for the volunteer (meeting new people, learning new skills, training, or professional references). Consider both tangible and intangible benefits.	

## Recruit Qualified Candidates

The position description for this role is a valuable tool to guide your recruitment efforts. Use the position description to inform your recruitment plan and to craft your messages. With a plan and messages in hand, you will have what you need to broadcast your message to individuals whose interests and skills will likely be a good match for the position.

Start with the targeted recruitment plan and then design messages that can be adapted for the various target audiences and media (e.g., social media, newsletters, personal emails, or texts, etc.). Of course, when seeking volunteers who are comfortable with technology, posting volunteer opportunities online is a great place to start. But don't overlook the chance to tap into your networks of current volunteers and other supporters because one of the best ways to attract individuals to serve with your organization is through peer-to-peer recruitment.

### **Finding Virtual Volunteers**

When developing a recruitment plan for virtual volunteer positions, be sure to:

- Tap your existing volunteers and current database – including board members and donors. Equip them to be effective peer to peer recruiters by encouraging them to share messages with their networks.
- Post on volunteer search engines such as VolunteerMatch.org, Hands On affiliates, your state's volunteer recruitment site if you have one, Catchafire, Zooniverse, and others.
- Leverage social media by posting on platforms where likely candidates already spend time, and mine your networks on LinkedIn especially if you seek specific skill sets.
- Connect with partners whose members or constituents have the skills or interests you seek.

## TOOL: Targeted Recruitment Plan

### Part 1

Referring to the Position Description for which you are recruiting, answer the following questions. Be sure to pay special attention to the key responsibilities, desired qualifications, and availability to inform your answers. Then, use these answers to complete the chart on the following page to plan your targeted recruitment.

1. **Who** would have the skills and interest to do this work? (Consider professions, geography, life stage, education level, and more. For example, for an online tutor, logical candidates include individuals with teaching experience or current college students comfortable with online learning platforms, so you could look to retired teachers' associations or university offices of community service.)
2. **Where** will you find them? (Consider professional associations, clubs, social media platforms, etc. Don't overlook your current volunteers. Examine who is currently volunteering and look at previous volunteers to identify their professions, experience, training, and education.)
3. **When** is the right time to outreach to these prospects? (Are there specific seasons when it is easier to reach these individuals? Do they have a busy season that would be best to avoid?)
4. **How** can you reach them? Which is the most effective medium to use? (Would an email invite be effective, or would an in-person presentation be better? Both?)
5. **Which people** are your potential recruiters? (Who in your current community has connections with these individuals or groups?)
6. **What** information about the volunteer opportunity would recruiters need to make a compelling invitation? How will you train these recruiters to share your invitation and make a compelling invitation?

Use these answers to fill in a Targeted Recruitment Plan customized for each available volunteer opportunity.

**Part 2**

**Volunteer Role** \_\_\_\_\_

**# Requested** \_\_\_\_\_

**Desired Commitment** \_\_\_\_\_

**Target Audiences** \_\_\_\_\_

\_\_\_\_\_

**Method/Media** \_\_\_\_\_

**Recruiter or Responsible**

**Person** \_\_\_\_\_

**Timeline** \_\_\_\_\_

**Evaluation** (How will you track recruitment efficacy?) \_\_\_\_\_

## TOOL: Effective Recruitment Messages

With targeted recruitment, it is important to create a message that will appeal to qualified prospective volunteers. For example, a message to ask a CPA to review your audit would be different from the message to a volunteer to make calls to check in with teens who haven't visited your youth center recently.

An effective recruitment message starts with the impact that the volunteer will have. Describe the assignment in one or two short sentences. Include information on the time commitment, location of the assignment, and the benefits for the volunteer. Finally, specify how to follow up and get involved.

Some examples are:

- Share your life experiences and enrich the lives of others! Become a volunteer instructor and help your peers learn new skills, engage in inspiring content, and share great social experiences. In just four hours a week you can make a difference by sharing your passion for history, science, literature, hobbies, travel, or more – and all from the comforts of your home or office. Support from our curriculum committee is provided. Contact us today.
- The hero we are looking for is you! For just 5-10 hours per month, you can help connect job seekers to meaningful careers by reviewing resumes and conducting mock interviews. This vital volunteer role helps our employment center serve more community members. Put your professional skills and networks to use by helping those looking for work in your field from the comforts of your own home or office. Training on resume writing and interviewing provided. Contact us today.

Volunteer messages should include a catchy, descriptive title, an attention-getting call-to-action, and information on how to learn more.

### **Position Title**

### **Crafting the Message**

To help develop the strategic message, start by writing three sentences on impact of the work, three sentences on impact of the organization, and three sentences describing actual tasks and time commitment.

### **Strategic Message**

Using the nine sentences developed above, design a few brief, compelling messages that can be posted online, shared in emails, or used as speaking points when reaching out to potential volunteers.

## Screen to Find the Fit

Impactful engagement relies on finding the best match between your organization's needs and the skills and interests of prospective volunteers. When seeking to engage volunteers virtually, take the time to ensure that the organization's screening policy addresses virtual volunteering.

- Are all components of the screening policy friendly for virtual use? For example, if you seek to engage virtual volunteers but your application is only available in paper form, it may be challenging to reach those who are comfortable with technology!
- Are the screening practices for each virtual role appropriate for the level of risk involved (consider risks to property, data, individuals, etc.)? In other words, are background checks necessary for all virtual volunteers, or just those who have access to vulnerable populations or private data or information?
- Are interviews necessary and/or helpful? If so, can a telephone conversation suffice, or would a video conference be required? Remember that, in some cases, requiring a video interview may make the opportunity less accessible to qualified candidates who either lack the necessary technology or prefer to remain off camera. If such technology is not a requirement of the associated volunteer duties, a video interview may not be necessary.

Elements of screening can include:

- **Application**  
An application provides information that supports your screening and interview process.
- **Eligibility Requirements**  
Are there specific requirements that volunteers must meet? For example, must be 16 years of age or older, possess a valid driver's license, hold current certifications, etc.
- **Background and/or Reference Checks**  
Volunteers are screened for the same reasons employers conduct background checks – to verify identity and minimize potential problems. Consider background checks for volunteers with access to financial data, handle money, or interact with vulnerable populations.
- **Interviews**  
Interviewing provides an opportunity for you to get to know the potential volunteer and for the candidate to learn more about your organization and expectations for their role.
- **Training and Certification**  
Some positions may require volunteers to complete specific training and certification requirements prior to being assigned to a volunteer position.
- **Probationary Periods**  
Probationary periods are used to assess whether a new volunteer or newly promoted volunteer is a good fit for the position prior to making a longer-term commitment.

Review this list and design a screening policy and process that is appropriate for the level of risk and responsibility for each virtual volunteer role.

### **Tips for Interviewing**

Interviews are dynamic, structured conversations designed to give both the interviewers and the candidates the chance to determine if the candidate is the right fit for the volunteer position and the organization as a whole.

If an interview is appropriate for this virtual volunteer role, be sure to use the interview to:

- **Set the stage** by welcoming the candidates and introducing yourself, clarifying the purpose of the interview, and setting a positive tone.
- **Ask questions** designed to learn about the individuals' experience, perspectives, and approaches to handling challenges they will likely encounter in this position.
- **Take notes** to minimize bias and ensure fairness in your evaluation of all applicants.
- **Give the candidate a chance to ask questions** as their questions can reveal a lot about their intentions and experience as well.

## Equip Virtual Volunteers for Success

The practices that have been used for decades to equip onsite volunteers for success are just as important when engaging volunteers virtually – they just may need a little adaptation. Onboarding, training, check ins and communications, and teambuilding are building blocks of successful engagement, but when applying them to those who serve in virtual and flexible roles, extra consideration should be given to how to implement, schedule, and document these practices.

### **Onboarding and Training**

Onboarding and training volunteers ensures that volunteers understand how their work fits into the organization overall and equips them with the skills and tools they need to fulfill their volunteer role effectively, which, in turn, will help your organization be successful. Additionally, receiving training is a benefit to many volunteers and so will motivate some individuals to apply for the opportunity.

Remember also that all staff who engage and support virtual volunteers should be trained in basic volunteer engagement skills and competencies. Many such trainings are available online from statewide associations, commissions, and volunteer centers as well as through national organizations and consultants, and all staff should know who in the organization they can consult with questions on volunteer engagement and how to address any challenging situations.

### **Orientations vs. Role-Specific Trainings**

Orientations and trainings generally serve different purposes.

Orientations:

- Introduce the organization's mission
- Provide context for the volunteer work
- Introduce the organization's team
- Set expectations of volunteers and the organization
- Introduce policies
- Review scheduling and reporting processes, if appropriate

Role-Specific Trainings:

- Introduce information and resources specific to this position
- Introduce the department or program team
- Demonstrate and train on skills
- Share more detailed resources
- Establish protocols around scheduling, check-ins, security, etc.
- Confirm knowledge acquisition of trainees, if appropriate

## TOOL: Virtual Volunteer Training Plan

Developing a virtual volunteer training plan helps you to identify:

1. What volunteers need to know to be successful.
2. Effective and efficient ways to communicate this information and build the necessary skills.
3. How to put these pieces together into an effective training program.

Answer these questions as part of your training planning. This training plan can be applied to only virtual volunteers, onsite volunteers, or both.

### 1. What do volunteers need to know to be successful?

- **General Orientation for all Volunteers**

Brainstorm and list the core information every volunteer needs to know. Consider information about your organization's mission and vision, history, leadership, and basic policies and procedures.

- **Role-Specific Training**

What information and skills does this particular volunteer position require? What skills and information would help volunteers in this role fulfill their responsibilities? What gaps in knowledge would impede their success?

**2. What is the most effective and efficient way to communicate this information and build the necessary skills?**

Complete this chart for each of the items on the skills and information list generated above.

<b>Vital Skill and/or Knowledge</b>	<b>How can this information or skill be effectively imparted?</b>  In writing or video? Through lecture or demonstration? By mentoring and on-the-job training?	<b>What is the best way to transmit the information and build the skill?</b>  Online lecture? Participatory convening? A written document?	<b>Who should present this or facilitate the learning?</b>  A volunteer? Staff member? Guest specialist?	<b>How long will it take?</b>  In minutes or hours? How long will it take for a trainee to learn and apply the skills and information?	<b>Notes and requirements for training</b>  Specialized software? Experts? Equipment?

### 3. What is the best way to put these pieces together into an effective training program?

Use the chart below to design a training plan that will effectively build all the above knowledge and skills.

#### Training Plan

<b>Training Module</b>	<b>Method of Delivery</b>	<b>Developer(s)</b>	<b>Presenter(s)</b>	<b>Key Content</b>	<b>Timeline for Development</b>	<b>Evaluation</b>
Name and Primary Topic	In person? Online? Handbook? Video? Other?	Who is responsible for developing, writing, creating the module?	Who is responsible for delivering or presenting?	Primary messages and topics to be addressed?	Deadline for having module ready to deliver?	How will you ensure participants have learned the information and can move on?

## Check Ins and Communications

Equally important as training is creating a culture of mutual support and accountability. In a culture of support, the organization's staff and leadership ensure that volunteers have all that they need to be successful, which can include sufficient training, space, technology, and other tools as well as clear communications and people to contact with questions so that all volunteers can do their job – and do it well.

### Technology Tips for Virtual Engagement

Technology does not need to be the center of all virtual engagements, but, when used wisely, it enhances the accessibility of volunteering, improves the efficiency of the work, and increases the impact of the engagement. Consider these tips:

- **Use real-time communications**, such as broadcast texts, instant messaging, and web conferencing. Don't forget, however, that sometimes a quick, old-fashioned phone call can also quickly get the job done while adding a chance for a personal check-in.
- **Take advantage of shared workspaces and collaborative work tools**, such as Google Docs, Sharepoint, Dropbox.
- Ensure volunteers have **access to shared documents or project management software** and that permissions are set appropriately.
- **Use group scheduling tools** such as shared calendars when appropriate. While the organization may use a calendar tied to the internal systems, including volunteers in the team may require linking to a more publicly available calendar system.
- **Train the whole team** on the online systems so both staff and volunteers are comfortable and proficient with the work systems.
- **Update policies around information, data, security, and confidentiality** to include virtual volunteers.
- **Select a volunteer management system** that integrates with mobile technology for maximum flexibility in reporting engagements and communicating with volunteers.

## TOOL: Volunteer Support Plan

Complete the following chart to ensure that each volunteer has a designated support person and a plan for checking in regularly.

<b>Volunteer Position Title</b>	<b>Staff Partner/ Supervisor/ Volunteer Leader</b>	<b>Date of first meeting to define expectations</b>	<b>Method of check ins (What technologies will be used for regular check ins? Web conference? Phone? Email?)</b>	<b>Checkpoint plan (How will you communicate and how often?)</b>	<b>Checkpoint dates and milestones</b>

## **Teambuilding**

Virtual volunteers are not only part of your volunteer corps, but a part of your organization's team in general. The events of 2020 accelerated the way that many organizations engage a hybrid team of paid employees – supporting staff working remotely or rotating through working onsite and offsite in shifts. If engaging virtual volunteers, then it is certainly equally important to support a hybrid pool of volunteers – those who serve onsite and those who engage wholly or in part virtually.

Building and nurturing a hybrid team of staff and volunteers takes a little more intention than simply expecting to build community by eating lunch together in the break room at your organization's building – if you even have one. Community building happens when you welcome in new members, have common experiences, share values and rituals, and, in the case of organizational volunteers and staff, have a shared commitment to your mission.

## Tool: Teambuilding Checklist

Consider these tactics to build community and teams when partly or entirely virtual. Add your current practices to each or include ideas to enhance your community building efforts.

### Communicate Effectively

- Provide a designated contact person.
- Share general information with all volunteers – regardless of where or how they complete their work. Access to information is key to ensuring that all volunteers feel informed and valued.
- \_\_\_\_\_

### Create and Reinforce a Team Identity

- Formalize entry into the community through orientations, welcome emails, or other forms of official initiation. When volunteers serve onsite, receiving their official volunteer badge often serves as an initiation that officially marks the individual's entry into the new community of volunteers. How can you translate that to virtual? Assignment of an organizational email address? Welcome video or email from the CEO? Other?
- Share other visual indications of who is a member of the volunteer community, such as a listing of new volunteers in the organizational e-newsletter or introduction to others on the team.
- Create and share "insider" resources such as e-newsletters, a member-only social media page, or other benefits to being part of the volunteer community.
- \_\_\_\_\_

### Build Relationships

- Provide opportunities to convene and get to know one another. For example, offer informal group lunches or brown bag breakfasts over video conference to enjoy down time together and plan some activities or discussions to enable people to get to know one another.
- Create study groups, book groups, or other peer groups to share experiences or learn together skills or research that can inform their work as volunteers and staff.
- Build small but meaningful rituals in virtual team meetings, such as check ins or wrap up activities for each convening.
- Invite volunteers to the department meetings or team convenings of staff with whom they partner. Online technologies make this more accessible than ever and, by including

volunteers in team meetings, the information only needs to be communicated once and volunteer input is more easily gathered.

- Assign new volunteers a buddy or mentor from among the more experienced volunteers to provide support and connection.
- Schedule one-on-one time with volunteers, through video calls, telephone calls, or other means.
- \_\_\_\_\_

## Recognize Impact

Traditional volunteer recognition programs often consist of certificates, banquets, and gifts, but those tactics appeal primarily to volunteers' extrinsic motivation. Today, however, more and more volunteers seek to know that their efforts make a difference and are motivated by being acknowledged for that impact.

Be sure to measure and track the impact of virtual volunteers beyond just logging their hours. How are their efforts extending the reach of the organization, making training more accessible, saving staff time, and more? Consider their impact in your overall evaluation and communicate those impacts with leadership, with colleagues, with the community, and, of course, with the volunteers themselves!

Review your full recognition plan to ensure that all volunteers are appropriately recognized in ways that are personally meaningful.

## TOOL: Virtual Volunteer Recognition Brainstorm

Use this checklist to inspire additional ways to acknowledge the impact that volunteers have on your organization regardless of where they serve (onsite or virtually). Consider ways to recognize and acknowledge all volunteers for their tangible and lasting contributions.

### Opportunities to **share the impact of their work**:

- Have volunteers make a presentation to the board whether in person, virtually, or through a recorded message
- Invite volunteers to write an article on their project for a publication
- Ask volunteers to represent you at meetings; this is especially easy as more and more convenings are occurring virtually
- Offer to write a letter of recommendation or commendation to the volunteer's workplace or school

### Opportunities to **gain or develop new skills**:

- Offer to send volunteers to a conference or cover their registration for a virtual conference
- Provide volunteers with training or mentorship on new technology, practices, or research
- Send volunteers (or cover their registration cost) to a lecture or program by an expert in a field related to their volunteer work or interests
- Offer to provide a time-limited mentorship or coach to a volunteer in a field related to their service or to their career goals

### **Small but meaningful tokens** of appreciation:

- Donate a book to a library in volunteers' names
- Order and deliver cute gifts to support their virtual work, such as a branded mousepad or yard signs that acknowledge that a valued volunteer lives there
- Create and issue branded digital backgrounds, clothing, or coffee mugs for the team which they can use when convening online with the team

### **Fun and memorable ways** to show appreciation:

- Create humorous awards such as...
  - Best attendance in meetings
  - Best Zoom background
  - Most inspiring pep talks
- Create a photo album or digital slide show with pictures of volunteer activities, programs, or events

### **Brainstorm additional ideas for volunteer recognition below.**

## Resources

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Sterling Volunteers, *Volunteer Recognition eTool Kit: Beyond Pins, Plaques, and Parties*. Sterling Volunteers. 2018. <https://offers.sterlingvolunteers.com/volunteerrecognition>

VQ Volunteer Strategies. Blogs, Tools, Templates. <https://vqstrategies.com>

## About the Author

Beth Steinhorn, VQ Volunteer Strategies President

Beth partners with organizations and their leadership to increase their impact through strategic and innovative engagement. The author of multiple books and articles on strategic volunteer engagement, she is a popular speaker and trainer. As a thought leader, Beth regularly participates in the national dialogue about volunteerism and engagement. Prior to becoming a consultant, Beth worked as an executive director and marketing director with education and faith-based organizations and spent years as a museum educator, manager, and anthropologist. She draws upon her anthropology experience still, helping organizations through the culture shift process – from viewing volunteer management as a program to embracing engagement as a strategy to fulfill mission.