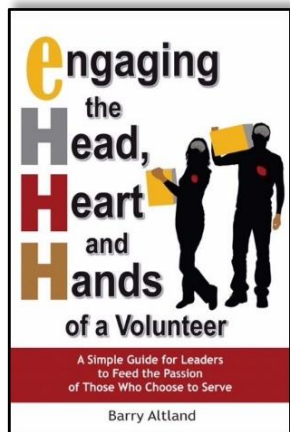


Leading Orientation and Onboarding for Your Volunteers

49th Annual Wisconsin Volunteer Coordinators Association Conference
May 2018



Barry Altland, Facilitator
Head, Heart and Hands Engagement Collective
Winter Garden, FL
<http://HHHEngagement.com>



Eight Questions - Group Discussion



Question #1



Orientation vs. Onboarding: Defining the Difference

Orientation	Onboarding
Event - Learning and Connection	Process - Prepare for Performance

Question #2



The Purpose of Orientation and Onboarding

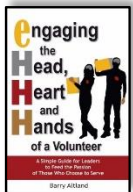
Information - Share the Story



Affirmation - Deepen the Emotional Bond

Preparation - Prepare for Performance

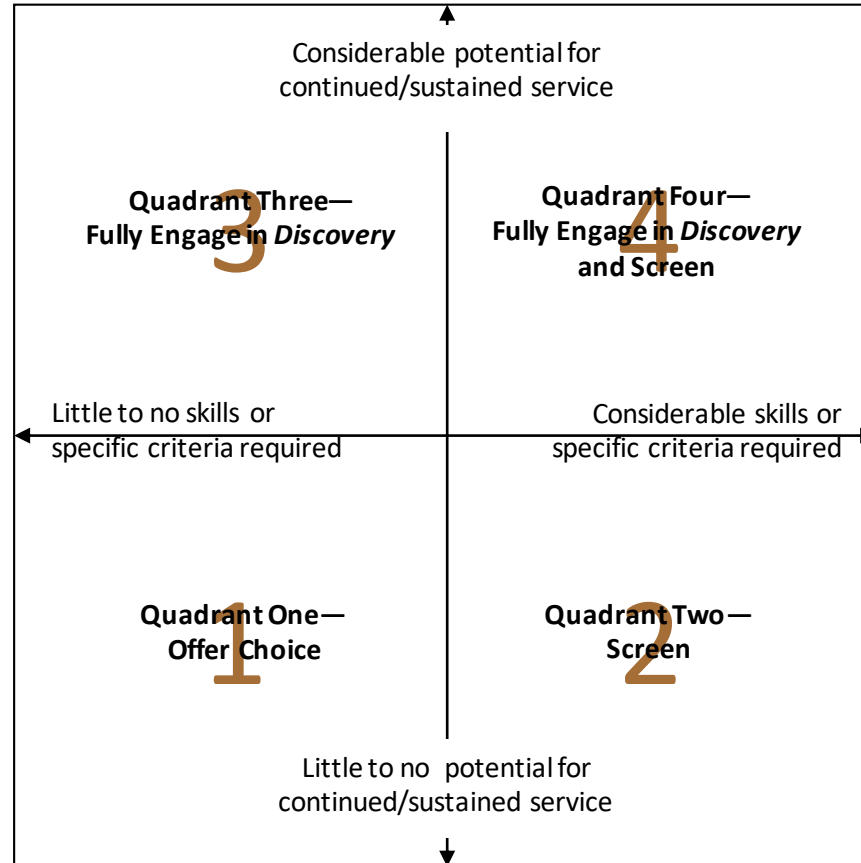
Connection - Foster Social Connection



Question #3



Time and Talent Matrix



When to Engage New Volunteers . . .

- ◆ Pre-Arrival
- ◆ Arrival/Orientation
- ◆ Extended Onboarding



Question #4



Methods/Modalities for Orientation and Onboarding

- ◆ Hard Copy Resources
- ◆ Digital
- ◆ E-Learning
- ◆ Video
- ◆ Internal Website/Portal
- ◆ External Website
- ◆ “Push” Method
- ◆ Others?



The Importance of Precision Execution

- ◆ Testing Technology
- ◆ Preparing Hard Copies
- ◆ Confirming Guest Speakers
- ◆ Prompt Greeting
- ◆ Name Tags/Cards
- ◆ Introductions
- ◆ Starting on Time
- ◆ Addressing Requirements First - Forms, etc.
- ◆ Facility Tour



Question #5



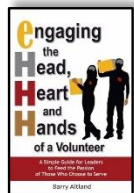
Topics to Be Included in Orientation

- ◆ Vision, Mission and Values
- ◆ History, Founders, Inspiration for the Movement
- ◆ Philosophies that Guide Decision-Making
- ◆ Organizational Structure
- ◆ Leader Names and Titles
- ◆ Locations and the Scope of the Cause
- ◆ How the Volunteer's Work Touches the Beneficiary/Community



Engage New Volunteers from the Outset . . .

“What have you learned so far about our organization?”



Question #6



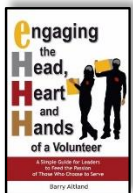
Deepening Affirmation



*“Will this
Volunteer role
feed my passion?”*



*“I made a
good choice
to serve here!”*



Question #7



By Any Other Name . . .

- ◆ Job Aid
- ◆ Task Reference Guides
- ◆ One-Sheeters
- ◆ Performance Support Tools



Task Guide Options . . .

- ◆ Hard Copy/Laminated
- ◆ Posted or Distributed?
- ◆ Mobile Easels/Dry Erase Boards
- ◆ Tablets/Technology
- ◆ How-To Videos
- ◆ Others?



Task Guide Components . . .

- ◆ What
- ◆ Why
- ◆ Who
- ◆ Where
- ◆ When
- ◆ How
- ◆ Visuals/Images/Diagrams/Graphics
- ◆ FAQs



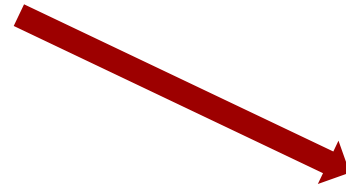
Task Guide Decisions Driven By . . .

- ◆ Accessibility
- ◆ Convenience
- ◆ Safety
- ◆ Cost
- ◆ Others?



The Goal of the Task Guide . . .

*Basic
Task
Competency*



*Future
Task
Mastery*

Question #8



Head, Heart and Hands . . .

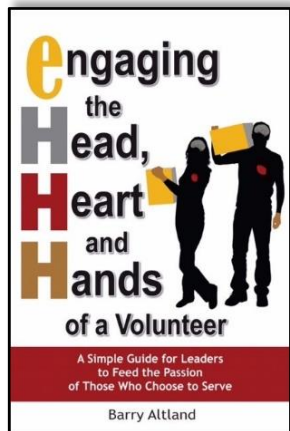


*Engagement happens
one person at a time.*



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