VIRTUAL VOLUNTEER SCREENING & ENGAGEMENT GUIDEBOOK

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IMPORTANT INFORMATION

This guidebook is current only as of the date of publication and does not reflect subsequent changes to law or policy.

Volunteer Alberta does not offer legal or professional advice. Therefore, you may wish to seek legal or professional advice to address concerns and issues.

LAND AFFIRMATION

Volunteer Alberta's main office is situated on Treaty 6 Territory, specifically, amiskwaciwâskahikan (ᐊᒥᐢᑿᒋᐚᐢᑲᐦᐃᑲᐣ) as it was referred to by the plains Cree peoples among other indigenous names, and the homeland of the Métis Nation. Our staff, board, and our work reach across Treaties 6, 7, and 8 and we affirm that the land we call Alberta is the traditional and ancestral territory, as well as present-dayhomes of many Nations, including the Blackfoot Confederacy – Kainai, Piikani, and Siksika – the Cree, Dene, Saulteaux, Nakota Sioux, Stoney Nakoda, the Tsuu T'ina Nation, and the Métis People of Alberta, which includes the Métis Settlements and the Six Regions of the Métis Nation of Alberta. Since time immemorial, First Nations, Inuit, and Metis peoples have cared for these lands, and they continue to do so today. We encourage you to visit https://native-land.ca/ to learn more about the land and its Nations where you live, work, and play.

Volunteer Alberta identifies and affirms the historical and current relationships of these Nations to the land as an act of reconciliation and with the awareness that acknowledging, recognizing, or affirming these facts is a small step and not enough. Quoting Sheila Batacharya and Yuk-Lin Renita Wong, Sharing Breath (2018):

"This recognition of land theft, while important, is discursive and thus remains limited. Indeed, our determination, as [mostly] non-Indigenous inhabitants of ... Turtle Island, to respect treaty relationships and acknowledge settler responsibility for the historical appropriation of Indigenous land is inescapably compromised, given that, in Canada, land can evidently be stolen and not returned provided you admit to wrongdoing, say you're sorry, speak solemnly about the need for reconciliation, and continue to make promises that, in fact, have never materialized."

Volunteer Alberta is committed to reflecting on, critiquing, and changing our ways of knowing, being, and doing in order to start concretely contributing to Indigenous resurgence in ways we have not yet done.

The Volunteer Alberta Team
June 2022

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INTRODUCTION

In response to public health measures over the last two years, virtual volunteering has emerged as an integral component of volunteer programs to continue service delivery. Volunteer Alberta recognizes the leadership and expertise of volunteer organizations in Alberta who have been at the forefront of meeting challenges brought on by the pandemic. Organizations have developed and implemented innovative strategies to meet these challenges and adapted the way volunteer programs are led. This resource is a compilation of trends and strategies volunteer organizations have successfully developed and implemented. It is meant to be a resource for organizations beginning, continuing, or enhancing their virtual volunteering activities. Specifically, this resource will explore volunteer screening and engagement from a virtual perspective. This guidebook is not an exhaustive manual of strategies and trends. Instead, it is a collection of good practices we have witnessed within the past two years. We also welcome feedback from other voluntary organizations, who we recognize as true volunteer management and engagement experts.

This resource follows Volunteer Canada's Screening Handbook, specifically the 10 Steps of Screening to organize the information and engage with volunteer screening and engagement from a virtual perspective. The Screening Handbook provides a comprehensive overview of screening, and we intend to add and expand upon the 10 Steps. In addition, we have provided templates, exercises, and case examples to facilitate meaningful engagement with the material.

The screening and engagement strategies in this guide are meant to be scalable. This means your organization could still do every step, but in a simplified version. It's also possible that your organization may not need all the 10 Steps to screen your volunteers effectively. As such, the information contained in this guidebook is presented as "good practices" in volunteer screening, rather than "best practices." We recognize the inherent assumption within the term "best practices" that there is only one best way.

> *In reality, we know that one-size-fits-all screening practices do not exist. Organizations must assess what works best for them and their community's unique circumstances while also adhering to their Duty of Care, Standards of Care, parent organization standards, and insurance expectations.*

We have identified platforms, software, or other products to support virtual volunteer activities throughout this resource. Volunteer Alberta and our partners do not endorse using one product over another. These are simply examples of platforms and tools that have worked for us and our partners.

WHAT IS VOLUNTEER SCREENING?

If you would like a more general introduction to volunteer screening, what it is and why it is important, please refer to Volunteer Canada's Screening Handbook (pages 7-8). For the purpose of this guidebook, screening is defined as the steps an organization takes to engage and build relationships with volunteers, find the best fit for volunteer positions, and assess and mitigate risk to program participants, volunteers, and the organization as a whole. Screening is not simply obtaining a Criminal Record Check (CRC), Police Information Check (PIC) or Vulnerable Sector Check (VSC). Obtaining background checks is one small step of the entire screening and engagement process. Screening should be seen as a holistic, multi-step process.

Some concepts that are central to volunteer screening are Duty of Care and Standard of Care.

DUTY OF CARE:

Duty of Care is a legal principle and the fundamental premise underlying volunteer screening.

It is the obligation to fulfill a legal, ethical, and moral duty to care for and protect clients, volunteers, employees, and, in some cases, funders. The appropriate level or standard is dependent upon the reasons why your organization exists, and the people involved (what client-base you serve). Duty of care is applied to both individuals and organizations, meaning that you have a duty to care as an employee, volunteer, or client, but your organization itself also has a collective duty of care.

STANDARD OF CARE:

Standard of Care is the degree or level of service, attention, care and protection that one owes another according to the law. You might also hear a standard of care referred to as "reasonable care." The Standard of Care you provide in a situation must account for the safety of all involved – the volunteer, the client, and your organization.

WHAT IS VIRTUAL VOLUNTEERING?

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Virtual volunteering is any volunteer opportunity someone can do on electronic devices, such as a phone, tablet, or computer. "Virtual volunteers can be episodic (participating in a one-time event, such as an online gaming fundraiser) or formal (providing support to an organization that does its work online, such as a support line)" (Government of Alberta, 2020). 'Remote volunteering' is often used interchangeably with 'virtual volunteering,' so it's important to be clear with volunteers and other stakeholders on what terminology you're using and what it means.
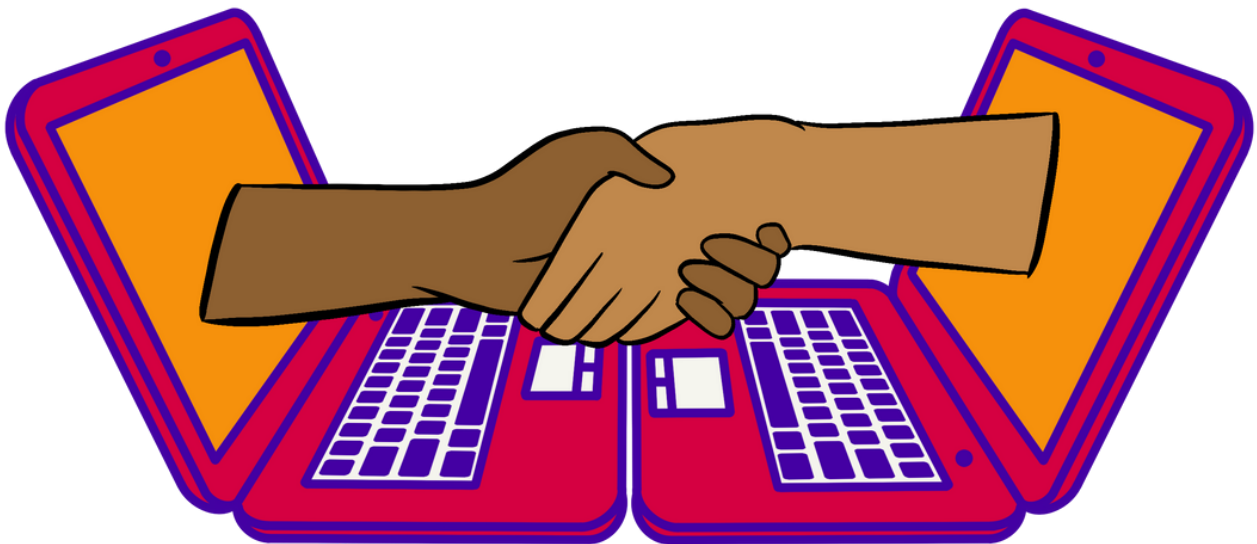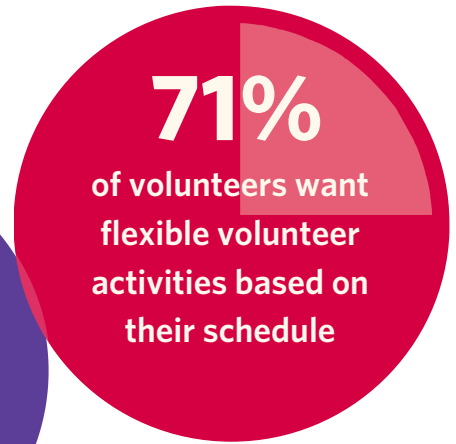
TRENDS IN VIRTUAL VOLUNTEERING

One main benefit of virtual volunteering often cited is flexible and adaptive scheduling. Virtual volunteering "is also not limited by geography, physical ability or work arrangement. You can choose to volunteer for an organization in your local community, across the country or across the globe all without needing to leave your home." (Volunteer Canada, [Virtual Volunteering web page](#)).

56% of organizations surveyed said they are now offering virtual volunteer roles.

[Volunteering Lens of COVID-19: Fall Survey Highlights, Volunteer Canada, 2020](#)

71% of volunteers want flexible volunteer activities based on their schedule

[Representing Volunteers in Alberta, Propellus, 2019](#)

There's no doubt that virtual volunteering in the face of public health measures has allowed some organizations to continue serving populations in important ways.

There are, however, some challenges present in virtual volunteering as well. One of the main challenges to virtual volunteering is the **'digital divide'**; that is, the discrepancy of Canadians with and without access to an internet connection of sufficient speed. In 2019 "the availability varied greatly between urban and rural areas, with only 45.6% of rural households having access to this kind of service, versus 98.6% in urban areas." Taking an **intersectional*** approach, this digital divide deepens even further. For example, only 34.8% of First Nations reserves were found to have access to this basic level of service, with the CRTC reporting that "this service was not accessible to First Nations reserves in Newfoundland and Labrador, Yukon, and Northwest Territories."

[The Canadian Radio-television and Telecommunications Commission (CRTC) has defined](#) sufficient internet speed as 50 Megabits per second (Mbps) for downloads and 10 Mbps for uploads.

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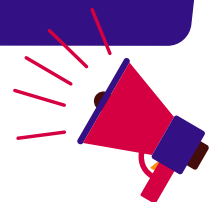
*Intersectionality is a term coined by Kimberle Crenshaw around 30 years ago. In a 2020 interview with [TIME Magazine](#), she describes it as "a lens, a prism, for seeing the way in which various forms of inequality often operate together and exacerbate each other".

HOW VIRTUAL VOLUNTEERING HAS IMPACTED ORGANIZATIONS

BENEFITS		CHALLENGES/LIMITATIONS	
Flexibility for volunteers and participants	69%	Some programs/roles not suitable for virtual delivery	78%
Improved technology skills for staff and volunteers	58%	Reduced volunteer to volunteer connections	65%
Brought new volunteers to the organization	41%	'Online fatigue'	64%
Reduces office or physical space	40%	Lack of access to and comfort with technology	61%
Broader access to volunteers: no geographic limitations for volunteers	36%	Time required to adapt all aspects of roles	44%
Operational cost-savings	36%	Difficulty obtaining PRC/VSC for some roles	14%

From Volunteer Canada: Volunteering Lens of COVID-19: Fall Survey Highlights.

Considering these trends and statistics, organizations must take an intersectional and equitable approach to adapt their volunteer strategy and utilize the benefits of and lessen the barriers to virtual volunteering.

If you would like more information on trends in virtual volunteering during the pandemic, please review Volunteer Canada's Volunteering Lens of COVID-19: Fall Survey Highlights.

EQUITY, DIVERSITY, AND INCLUSION (EDI) IN VOLUNTEER SCREENING

Co-written with Anagha Devkota, Programs and Evaluations Assistant, and Micheal McOuat, Administrative Assistant with Volunteer Alberta

The pandemic amplified injustices faced by equity-deserving communities. We can't ignore how the nonprofit and voluntary sector has contributed to these injustices. As your organization considers new or improved virtual models for volunteer screening, it's important to remember how the screening practices you use can either help or hinder volunteer engagement from different demographics of volunteers. Current trends show that nonprofit organizations have shifted to thinking more about equity, diversity, and inclusion (EDI). Still, the efforts are not well documented and cannot be leveraged and shared with the sector. Reports show that even if organizations committed to EDI in policies or communications, volunteers couldn't recall training or information focused on this topic (Timbrell, 2020).

Leaders of organizations need to ignite EDI discussions, initiate training, invest in resources and foster a culture of inclusion and equity. Organizations must approach this work through an intersectional framework and critically analyze how their screening and engagement policies may present varying levels of barriers to potential volunteers. Throughout this guidebook, we have tried to be intentional in providing examples and recommendations to help ground your screening and engagement activities in an EDI and intersectional approach. **Each step of the screening process requires careful review to identify where biases affect policies and practices and address power inequalities.**

A valuable place to start could be reviewing a recently published 10-page report by the Volunteer Centre of Calgary titled: An Anti-Racist Approach to Volunteering authored by Dr. Moyo Mutamba and Janet Rock. In it, they acknowledge that "like other sectors built on white supremacy culture, the volunteer sector is racist and colonial (Joyslin, 2020)." Their report provides preliminary Calgary-specific findings on the experiences of racialized volunteers, including barriers that disproportionately and negatively impact Black, Indigenous, and People of Colour (BIPOC). They state that "there is not a single step in the volunteer screening practice that does not impose significant barriers for BIPOC participants" (Mutamba, & Rock, 2021).

We encourage you to review this report and think carefully about how your volunteer screening practices contribute to these trends and how you can work towards making the nonprofit/volunteer sector more equitable, diverse, and inclusive.

Volunteer Alberta is in the continual process of learning and unlearning and we welcome conversations with our community on these topics.

Micro-Inclusions are small-scale actions you can do to create a culture of inclusion at your organization or in a social space. Micro-inclusions can be as simple as giving time to celebrate diverse holidays or giving space for people to share their pronouns if they'd like to. They are small things that can help people feel included, or that they belong in a space. Micro-inclusions are not formal actions or policies such as regulations for addressing discrimination. Micro-inclusions can be seen as the opposite of, or antidote to, microaggressions. If you would like to learn more about micro-inclusions, see these resources:

- **What to Do When You Encounter Sexism at Work: Micro-Inclusions**
- **Microinclusions: Daily Acts of Inclusion That Make a Difference**
- **Turn Microaggressions Into Micro-Inclusions**

Here are some other valuable resources to start learning and thinking about white supremacy culture and EDI in the volunteer sector:

- Volunteerism Best Practices: Not Best for Everyone - Minnesota Alliance for Volunteer Advancement, 2020

- Recognizing Racism in Volunteer Engagement - Minnesota Alliance for Volunteer Advancement, 2020

- White Supremacy Culture - Tema Okun

- Addressing Issues of Equity in Volunteerism: Where to Look & What to Do

- 2019 Nonprofit Diversity Practices

10 STEPS OF VIRTUAL SCREENING

Volunteer Screening is a holistic, multi-step process. Use the 10 Steps to plan and be intentional in your approach to volunteer screening, and know that one-size-fits-all screening practices do not exist. Organizations must assess what works best for them and their community, while also adhering to their Duty of Care, Standards of Care, parent organization standards, and insurance expectations.

1 ASSESS
Assess and develop standard policies and procedures for volunteer screening.

2 POSITION - ASSIGNMENT
Write clear volunteer position/role descriptions. Set guidelines and expectations for volunteer positions, and clarify roles and responsibilities.

3 RECRUITMENT
Establish and commit to a thorough recruitment process and make this commitment clear to potential volunteers by informing them of your recruitment process up front.

PRE-HIRING PROCESS

4 APPLICATION
Use an application form. Limit the collection of information to what is necessary to carry-out an interview for the volunteer role, and ask for permission to call references.

5 INTERVIEW
Get to know the volunteer. Communicate your organization's expectations and assess the suitability of the candidate for the role. Ask about past employment and volunteer positions. Remember to use your intuition!

6 REFERENCES
Check references in accordance with the requirements of the position and relevant legislation. Be sure to explain the position/role, the potential vulnerability of participants, and ask for open comments.

7 POLICE/BACKGROUND CHECKS
If you have determined a CRC/PIC/VSC is necessary for a volunteer role, contact your local police service to clarify which type of check you need. Be sure to include the volunteer role description for the benefit of the police service, your organization, and the volunteer during this process. Assess the results of the check against your policy.

HIRING PROCESS

8 ORIENTATION & TRAINING
Train the volunteer on appropriate organizational structures and policies. Introduce the volunteer to the specific tasks, procedures and scope of the position. Set expectations for behaviours, communication, and supervision or support.

9 SUPPORT & SUPERVISION
Develop a supervision/support plan. Provide regular supervision and support to ensure the volunteer is fulfilling their duties, and feels comfortable in their role. Clarify expectations, identify successes and challenges, and provide support.

10 FOLLOW UP & FEEDBACK
Elicit feedback from volunteers, participants, and community members about the screening process, the services provided by the volunteer, and the needs of the community. Ensure feedback is listened to, and acted upon.

MANAGING VOLUNTEERS

10 STEPS OF VIRTUAL SCREENING

1. ASSESS

The first step to moving your volunteer program to a virtual model is to do a broad-brush assessment or audit of your organization's current volunteer policies and practices and consider which ones can be converted into virtual volunteer policies and practices without much extra work.

Some important questions to ask are:

- **Do you have any policies on technology use that could apply to virtual volunteers?**

- **What is your organization already doing to manage or screen volunteers virtually, and what, if anything, needs to change if the role is moving online?**

- **What types of virtual or remote software or hardware is your organization utilizing already?**

- **Think about your staff and stakeholders: Do you have the internal capacity or are connected to an individual or organization in your network who identifies a particular interest, expertise, or passion in virtual technology and related issues?**

This step can feel overwhelming but at this point, try to stay high-level, focus on information gathering and move into detailed work later in the process. This will help identify your immediate priorities, what you already have the internal capacity for, or where you may need some external help or collaboration. Remember to engage all levels of your organization, when appropriate, in these conversations and considerations:

Board Members & Leadership:	Volunteer Engagement Specialists:
• Policies	• Recruitment
• Governance	• Retention
• Risk & Liability	• Positions & Roles
• Due Diligence	• Responsibility
• Duty of Care	• Duty of Care
Volunteers:	**Participants:**
• Giving & Sharing Feedback	• Recruitment
• Belonging & Inclusion	• Feedback
• Duty of Care	• Recognition

Volunteer Canada has created the "Online Code Audit Tool." The member-exclusive Code Audit guides organizations through analyzing the effectiveness of their volunteer involvement strategies and processes, identifying organizational strengths and prioritizing areas for further development."

An important part of assessing your screening policies, procedures, and practices is to better prepare your organization to identify and manage risk to your volunteers, participants, and the organization as a whole. IntegralOrg created an online risk assessment toolkit. This toolkit is for nonprofits of all sizes, whether they are new to risk management or have already established foundational risk management practices. Organizations can get a sense of where potential risks might lie and how to build their capacity to manage them. For organizations actively assessing and planning around risks, the tool complements that more fulsome and ongoing risk management process.

Here is a helpful workbook developed by Volunteer Alberta, which can help you to begin developing volunteer screening policies and procedures: Volunteer Screening Program: Policies and Procedures Workbook
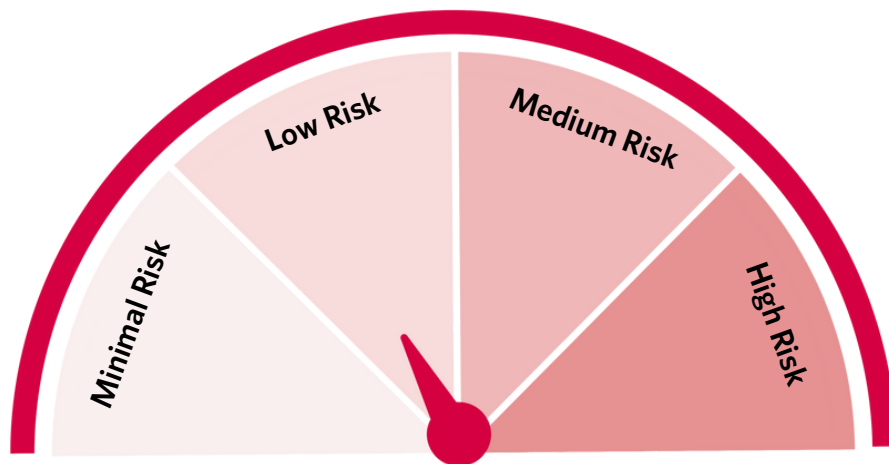
PRIVACY AND DATA COLLECTION

With a move to online activities and processes, we recommend reviewing and updating your privacy and data collection/retention policies. [Volunteer Canada's Screening Handbook](#) (pages 19 to 34) has comprehensive information about proper data collection and privacy. We recommend you read or review that information and assess your current policies and procedures. Moving your volunteer screening process online may mean collecting more data through virtual means. Therefore, it's important to know how to properly store and retain this information to protect the privacy of your current and prospective volunteers.

CYBERSECURITY

Written by Liz Tang, Program Coordinator with IntegralOrg

Chances are, if you think your organization has never had a cybersecurity attack, you aren't looking hard enough. Not only has virtual volunteering opened doors of opportunity for nonprofit organizations, but with volunteers on more devices with more access to sensitive data than ever before, it has also opened many more doors through which cybersecurity can be threatened.

Simply put, **cybersecurity** is the practice of protecting an organization's network, devices, and data from unauthorized access or exploitation. We will explore some ways in which these changes may increase your organization's **cyber risk**, that is, the potential for loss or harm related to the uses of technology within an organization.

Seeing as nonprofits are embracing remote and hybrid volunteering models for the long run, the issue of secure access is further complicated by personal electronics, commonly referred to as **Bring Your Own Device (BYOD)** practices. Opting for BYOD is a budget-friendly and commonly used alternative to purchasing and issuing work-specific devices to volunteers. However, the money saved from having volunteers provide their own devices may not always outweigh the potential financial, reputational, and operational drawbacks of a BYOD set-up gone wrong. Variety is not the spice of life in this case, as the mixed operating systems (i.e., iOS and Microsoft) and software and firewall capabilities that accompany the use of personal devices can pose challenges for IT assistance and ensure protection against viruses and malware are up to date. While the option to implement a mobile device management (MDM) application on BYOD devices to protect work data from personal apps and browsing activity may be a solution to many BYOD pitfalls, greater access to your volunteers' personal devices may make the lines between their work and personal life blurry.

With rapidly changing technology, it can be a challenge to keep up to date with emerging risks and best practices in cyber security – here are some general tips with links to resources:

- Consider assessing whether your sensitive data and website servers reside in Canada as it can be more difficult to ensure foreign service providers comply with Canadian privacy legislation (such as the federal Personal Information Protection and Electronic Documents Act; PIPEDA, and Alberta-specific Person Information Protection Act; PIPA)

- Create clear offboarding and data retention policies to wipe dormant and exiting volunteers' devices of any data and access they may possess.

- Secure your volunteer's identities along with your data by using multifactor authentication (MFA) on both primary platforms (ex., email services, cloud-based sharing) and secondary apps (ex., communication channels and online subscriptions).

- Reduce the number of entryways through which your critical data is accessed by conducting an internal audit to ensure that all users have appropriate access and authorization on all servers.

Inevitably, the worst may still happen; systems could fail and cause a service interruption or an incident affecting the confidentiality of data could put your organization's reputation on the line. Luckily, the process of addressing a cybersecurity incident can be similar to the way your organization responds to any incident. A good start would be to create an incident response team ahead of time, consisting of decision-makers and communications personnel, should a public statement of a security breach be required. The team's first task would be to compile internal and external communication plans and contact information of technology vendors, managers, and relevant law enforcement, both in digital and hard copies. Recovery should include close monitoring and documentation to ensure the incident is still not ongoing and debriefing the lessons learned and opportunities for improvement.

Ultimately, fostering a culture that empowers volunteers alongside staff with cyber risk training so everyone has a clear understanding of the security policies in place and can identify threats like phishing emails is a great way to set up your organization against a myriad of digital dangers.

2. POSITION - ASSIGNMENT

Next in your move to virtual volunteering is to look at your current volunteer roles/positions and assess which ones could be easily converted to a virtual experience without much adaptation. It's also possible that not all your volunteer positions can be converted to a virtual or remote opportunity, and that's okay! Volunteer Canada found that 30% of organizations surveyed said they could not offer/adapt to virtual volunteering roles. We encourage you to get creative and think about brand new ways to offer volunteer opportunities!

Volunteer Alberta has developed this worksheet for "Thinking and Acting Differently," and it may be a good place to start brainstorming before creating new volunteer positions. Perhaps you could offer some hybrid volunteer work if that makes sense for the position, with volunteers working remotely and in-person, depending on the work. Or introduce some microvolunteering opportunities! Part of this step should include renewed risk assessments to see what sorts of risks may or may not be present now that the role is moving online or remote. Review our Virtual Volunteer Risk Assessment Matrix and our In-Person Volunteer Risk Assessment Matrix below on page 16. You can use them independently or use them both if offering a hybrid model.

| Examples of microvolunteering that may require little to no screening:	VA Resources on microvolunteering:
• Filling out a survey • Testing websites for accessibility • Signing a petition • Helping with city or park clean-up events • Making face masks or mittens to give away	• Microvolunteering: the benefits and drawbacks • Re-thinking volunteer engagement during a pandemic: Micro-volunteering

The process through which your organization writes position descriptions for virtual volunteer roles should not differ much from how you write position descriptions for in-person volunteer roles. Some of the required skills, materials, or risks may differ. Still, the process to write an effective position description should be similar. Writing good position descriptions goes hand-in-hand with accurate risk assessments. We have provided templates on page 16 and a link to Volunteer Alberta's presentation on "Developing Volunteer Positions."

Suppose your organization does not have formal volunteer position descriptions, or they are outdated/incomplete. In that case, you should consider developing them for clarity and liability purposes. A position description can be a beneficial step in establishing expectations for a volunteer and organization. But additionally, Alberta's Freedom to Care Act provides individual liability protection for volunteers working within the scope of their volunteer position. To maintain this protection for your volunteer, it is a good idea to have a volunteer position description on file to establish what is and is not in the scope of their volunteer work, so you can ensure that your volunteers are working in scope for the position they were intended to fill.

If you want to see other examples of virtual or remote volunteer position descriptions, you can also search for current virtual, remote, or 'flexible' volunteer opportunities. Looking at how other organizations have phrased their role descriptions can provide a good starting point. Refer to the section below on page 16 about recruitment for links to online volunteer recruitment platforms where you can search and find other organizations' virtual, remote, or flexible volunteer positions.

Please note the Freedom to Care Act does not provide protection for organizations. It only protects individual volunteers. For more information about Freedom to Care, click here.
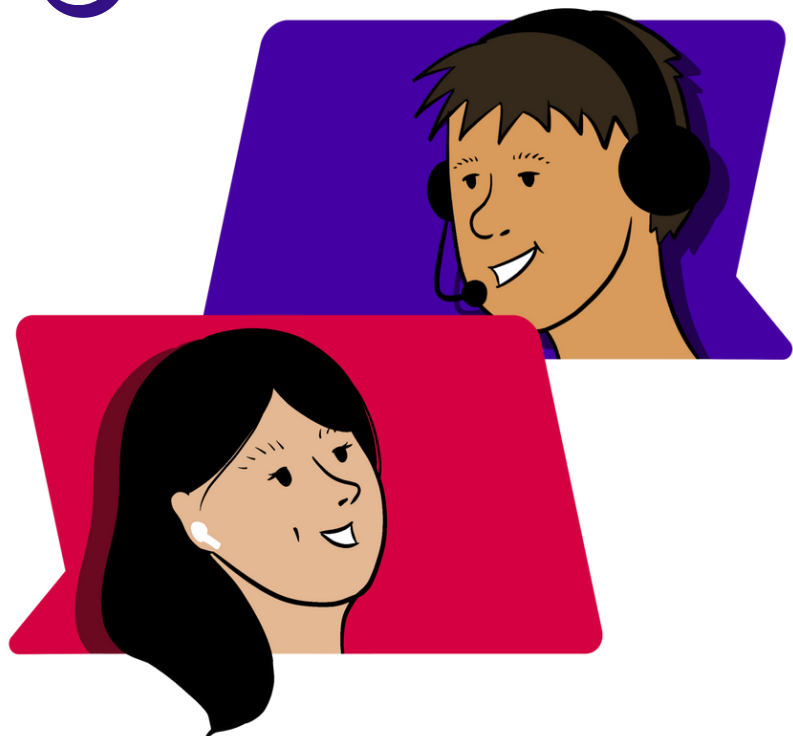
In general, your position description could include:

- Information about your organization – Vision, Mission, Values
- Position title
- Primary duties and responsibilities of the position
- Location (including an indication of whether the position is virtual, in-person, or hybrid)
- Qualifications, skills, and competencies required to carry out the duties and responsibilities
- Who the volunteer may report to or be supervised by
- Potential risks associated with the position
- Time commitment required
- Any materials or tools the volunteer may need to successfully carry out the duties and responsibilities, such as transportation, computer, tablet, mobile phone, steady connection to internet, specific computer programs, webcam, microphone, etc.
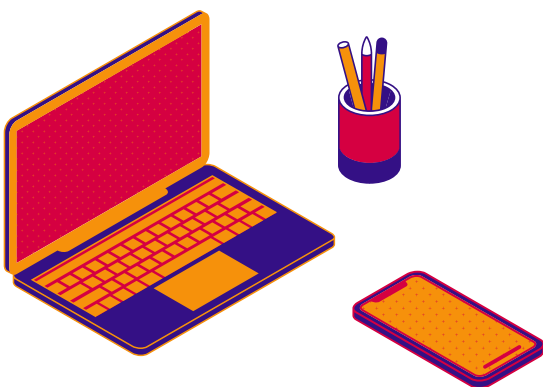
- It can be helpful to clarify whether the volunteer is responsible for providing these materials themselves or if the organization will provide access to the required materials or tools.
- Further, it's worthwhile to have some policies and procedures around the logistics of volunteer technology use. For example:
    - What happens if volunteers' property is damaged while carrying out their duties?
    - What happens if organization-provided property is damaged while carrying out volunteer duties?

Here are some useful risk assessment tools and templates you can use to review and assess the risks associated with specific volunteer roles. You can find these resources by clicking on the links and downloading your own .

- [Virtual Volunteer Risk Assessment Matrix](#)

- [Virtual Volunteer Position Description, Risk and Policy Considerations Template and Examples (Virtual Friendly Caller, Online ESL Conversation Facilitator, Social Media Coordinator)](#)

- [Virtual and In-Person Volunteer Position Description, Is a PIC/VSC Necessary? Blank Template](#)
  - Virtual Example: Friendly Caller
  - Virtual Example: Online ESL Conversation Facilitator
  - Virtual Example: Social Media Coordinator

- [In-Person Volunteer Risk Assessment Matrix](#)

- [In-Person Volunteer Position Description, Risk and Policy Considerations Template and Example (Head Coach for a Sports Organization)](#)

3. RECRUITMENT

Co-written with Katie Dodd, Head of Partnerships with Volunteer Connector (the Volunteer Centre of Calgary)

ONLINE RECRUITMENT PLATFORMS:

It's likely your organization is already utilizing online platforms for volunteer recruitment. Some common places for organizations to advertise open volunteer positions are Volunteer Connector, your local volunteer centre, or Volunteer Canada.

> **Other volunteer recruitment ideas:**
>
> - Posting on a university or college site
> - Word of mouth – tell your current volunteers when there are new opportunities or follow-up with former volunteers
> - Posting in a community-specific newspaper
> - Translate the volunteer opportunity in multiple languages
> - Share volunteer opportunities with other agencies that send newsletters to members

Social media can also be an effective tool for recruiting volunteers. If you are looking to recruit volunteers through social media, it is important to have policies and procedures to help guide these efforts, harness the benefits, and mitigate the risks.

Start by talking to other nonprofits or organizations in your community or who you look up to, and ask about their social media policies. Additionally, conducting a simple search on your preferred search engine for "social media policy for nonprofits" reveals a wealth of information, guides, and templates on how to develop effective social media policies and procedures, which include things like deciding who is responsible for posting and monitoring social media, how to respond to negative or controversial comments, or which platforms you could be engaging with and for what purposes.

This blog by Hootsuite provides a comprehensive, introductory overview of what information should be covered in a social media plan.

Social Media Policy!

A common challenge Volunteer Alberta has heard from organizations about virtual volunteer recruitment is when an organization feels they have exhausted their usual recruitment 'pool' and struggle to find new spaces to recruit in or a fresh demographic to communicate with. An exercise that may help address this challenge is to review your organization's communication strategy and do an internal inventory and an environmental scan related to online communications platforms. Volunteer Alberta developed this communications tool to help guide this process.

Start with your organization and take inventory of all the marketing channels you have access to and which ones get more engagement or attention. For example, does your Facebook page get more likes and comments than other social media platforms? Do lots of people open and read your newsletters? Does your website have a lot of visitors? By using the freely available analytics/metrics tools on social media platforms, you can take stock of your channels and which seem more effective. You can then narrow down which marketing channels you'd like to use to attract your volunteers.
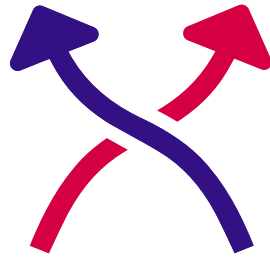
It can also be helpful to look at other organizations that you admire or partner with to see if they are utilizing any online spaces that you are not active in. Remember that you do not need to be active on every social media platform. It is better to do fewer platforms well than try to be active on every platform if you have limited resources to dedicate to social media management. If your organization does not have some communication channels, like social media or newsletters, consider asking other organizations in your community if there's an opportunity to cross-promote your content on their communications platforms.

It's a good idea to not only think about where you reach audiences but also who your current audience already is in comparison to the audiences or volunteers you would like to reach. Take some time to brainstorm the kind of people that are or would be ideal volunteers for your different roles or positions. Then, you can create volunteer 'personas' or brief profiles that tell you more about your ideal volunteers, such as their interests, personality traits, demographics, expected behaviours, etc. By creating volunteer personas, you can reference them when you revise your position descriptions or when you're putting a call-out through different channels. You'll be able to speak to and relate to your intended audience better and in a more relevant way. It could mean the difference between attracting a skilled volunteer for larger projects versus a volunteer who can only commit an hour a week. For templates and examples, search online for "creating customer personas" or "customer persona template" – there are lots of resources and examples of this exercise, and you can freely adjust the process to meet your organization's needs. LinkedIn Learning has many training resources and videos on marketing and communications. Check with your local library to see if courses like this can be accessed for free with your library card.

To continue grounding your work in an EDI and intersectional approach, and before you begin this exercise, **it's essential to reflect on and identify your implicit biases**, as they can influence how you recruit, where you recruit, or who you recruit. Think about the diversity, or lack thereof, of your prospective volunteers. One study conducted in the UK found that some organizations expressed hesitation to target recruitment efforts at diverse communities based on the unfounded fear that focusing on recruiting a diverse range of volunteers could risk upsetting current volunteers and lead to one demographic being prioritized over another (Timbrell, 2020). In fact, the Minnesota Alliance for Volunteer Advancement (MAVA) found from conducting listening sessions with BIPOC volunteers that 'representation' was a key motivating factor for volunteering. "They wanted to ensure that people delivering services to BIPOC communities both looked like the individuals being served and understood their life experiences." This factor of 'representation' "is not commonly cited as a motivating factor for non-BIPOC volunteers" and speaks to the importance of ensuring appropriate representation in your volunteer pool (Joyslin, 2021).

Another thing to consider, if one of your goals is to recruit a more diverse volunteer pool, is to first look inwards at your organization and think about your EDI work carefully. Trying to diversify your volunteer pool without first examining why your organization is not already attracting volunteers from specific identity groups may lead to some unintended negative consequences.

There is a difference between trying to recruit a diverse team of volunteers to bring to your organization and changing your organization from the inside out, being a leader in EDI, and having a diverse group of people seek your organization out for volunteer opportunities.

One of the benefits of virtual volunteering is that volunteers are not limited to specific geographic regions. When developing or revising your recruitment strategy, think about whether you want to recruit or accept volunteers from outside a particular geographic region, in another province or territory, or even from another country. This decision could have implications tied to your recruitment strategy and your risk assessments, application process, interviewing practices, or the process of obtaining background checks. There could be significant benefits to having a geographically diverse volunteer team, but there will also be inevitable challenges. Engage thoughtfully in a cost-benefit analysis and think about including your staff, Board, volunteers, and participants in the discussion.

Current or former volunteers can also tell you what enticed them to volunteer with your organization in the first place and give you feedback on how to advertise volunteering with the organization to other people. Your volunteer recruitment strategy should include getting feedback from your volunteers to ensure you know what draws people to your organization.

CAN VOLUNTEERS FIND YOUR OPPORTUNITIES EASILY?

ON YOUR WEBSITE

Make sure your link to volunteer opportunities is on your homepage, so visitors don't miss it!
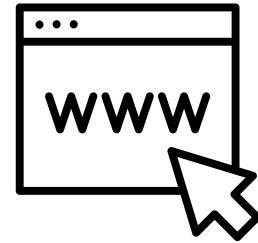
ON SOCIAL MEDIA

Share opportunities on your most engaging platforms, use eye-catching photos or videos!

GOOGLE SEARCH

If you want to be found through Google search, learn about search engine optimization (SEO)

SEO is when you incorporate commonly searched key terms/words/phrases that relate to your organization, the work you do and your volunteer opportunities through the front-end and back-end of your website

# *VIRTUAL VOLUNTEER FAIRS: A CASE EXAMPLE*

Co-written with Emma Wallace, Program Specialist with Edmonton Chamber of Voluntary Organizations

Another effective virtual recruitment tool that has increased in popularity during the last two years is virtual volunteer fairs. Like an in-person fair, virtual volunteer fairs use online software to connect prospective volunteers with organizations either in real-time or using recorded materials.

In 2021, the Edmonton Chamber of Voluntary Organizations (ECVO) hosted a real-time virtual volunteer fair using a platform called HopIn. HopIn is an online trade show platform that can be customized to suit the needs of a virtual volunteer fair. The platform is interactive, allowing individuals attending the fair to navigate through 'booths' and the 'mainstage' at will.

Booths can be previewed before the participant 'enters' (organizations can choose to have website links and a blurb or video about their organization for preview), and once entered, individuals can have a live video or audio conversation with the Volunteer Engagement Specialist at that booth. The mainstage provided a central area for various presentations from current volunteers, Volunteer Engagement Specialists, local government officials, or other experts in volunteering.

ECVO also contracted a production studio to support the entire online process. The production studio developed the event infrastructure through the HopIn platform, provided "how-to" sessions for organizations to understand how to use the platform, connected in the speakers, and provided overall tech support and oversight on the day of the event. ECVO cites this production studio as a key competent of the event's success. However, there are alternatives explored at the end of this section.
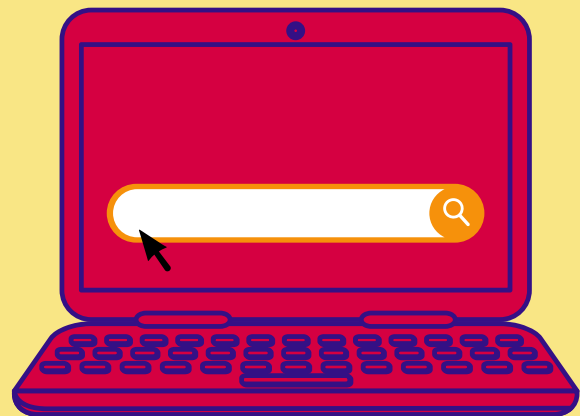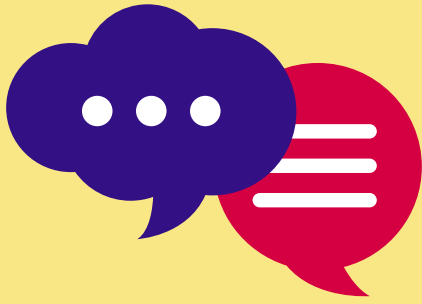
Two of the biggest challenges present during the event were technology and language barriers. ECVO planned to partner with local front-line serving agencies such as Sage Seniors Association and the Edmonton Public Library to have the volunteer fair open on their public-facing computers, but at the time of the fair, all potential partner organizations still had their doors closed to the public due to public health regulations. The HopIn platform supports closed captioning, but they were unable to hire translators or live captioners. Another overall challenge in organizing this event was the size and time constraints on ECVO at the time. Looking back, they recommend planning as far in advance as possible (at least three months) and partnering with other Volunteer Centres, funders, or organizations for support.

Another aspect to consider is how you will advertise or promote the virtual volunteer fair. ECVO conducted a social media campaign and partnered with a radio station to get the word out through interviews and commercials They also worked with the Canadian Broadcasting Company (CBC) and local newspapers for radio and TV interviews and news stories.

Lastly, they created advertising packages for all the registered organizations to facilitate easy promotion for them as well. Advertising packages could include digital graphics or posters about the event; branded with the host organization's logo, but also with space and in an editable format for the registered organization to include their branding as well, print materials if appropriate, and contact information if organizations or members of the public had questions about the event.

Overall, the feedback from participating organizations was very positive, with some saying they preferred the virtual platform because it was more accommodating to their schedules. For example, they didn't need to dedicate a weekend to the fair, and they could multi-task when no one was in their booth. Organizations also reported that despite having a lower overall turnout, they averaged eight meaningful conversations, which is the same as has been reported in previous years with in-person fairs.

Another strategy instead of a live virtual fair could be a pre-recorded volunteer fair. Organizations submit pre-recorded videos that briefly explain who they are, what volunteer positions they have available, and the benefits of volunteering with their organization. These pre-recorded videos can then be posted in an online gallery where visitors can watch the videos and then be directed to who they can connect with to follow-up and get more information or apply for the opportunity.

Some examples of ways to organize these videos could be posting videos to a gallery page on your website by embedding YouTube or Vimeo videos within the page, making a 'Playlist' on YouTube, or even using social media channels like Facebook, Instagram, or Twitter. The benefit of this type of virtual fair is it is much less expensive and does not require as much external support or coordination.

Other recommended software to look into for virtual volunteer fairs or engagement:

Run the World

Loom

Pheedloop

ACCESSIBILITY:

With all online activities, including recruitment, applications, or other steps in your screening and engagement process, it's important to think about making the content accessible and inclusive. Adding alternative text, or 'Alt. Text' to photos and videos when possible, having closed captions or subtitles on videos, or offering content in multiple languages are all things that can remove barriers and increase accessibility to your content and resources. This blog, written by TechSoup Canada, provides a comprehensive, introductory overview of things to consider when thinking about how to make your online spaces more accessible. Specifically, the section on "Test Your Tech" provides some handy tools to assess your website's accessibility. Check out Siteimprove for a quick assessment tool or this set of accessibility evaluation tools from the World Wide Web Consortium (W3C). You could even consider a microvolunteering opportunity where someone who uses accessibility tools, such as screen-readers, to navigate online could volunteer to help ensure your content is accessible.

One common way websites try to protect their data is through CAPTCHA. We can't comment on the effectiveness of this tool; however, we are aware that the use of CAPTCHA is a barrier to many people with disabilities.

When it comes to the digital divide and trying to make online content more accessible to those without a stable internet connection or other barriers to participating virtually, think about alternate ways they could still participate. Is there a way for individuals to participate over the phone? Could you partner with a local library or other community partners to offer any in-person support for technology use?

- **Is there a way for individuals to participate over the phone?**
- **Could you partner with a local library or other community partners to offer any in-person support for technology use?**

- VA Resources search results for "Recruitment"

- Volunteer Alberta Slide Deck & Presentation Notes – Volunteer Recruitment and Hiring

- VA Window of Work Template
    - This resource can be used in the volunteer recruitment process, as part of an application form, part of a volunteer's yearly check-in or evaluation, or even as a personal tool for individuals to assess what they'd like to do as a volunteer (or even as a staff member – this sheet works for staff as well!).

- Volunteermatch.org webinar on Social Media and Volunteer Engagement

4. APPLICATION

Application forms and processes for virtual or remote volunteering will be fairly similar to applications for in-person volunteer roles. Perhaps you use a word document or PDF and have applicants fill it out online, email, or print and scan it back to you. You could also use an online tool to facilitate digital applications. Some examples are Google Forms, Survey Monkey, and JotForm.

Think also about your points of contact with prospective volunteers:

- **Do you want them to have to speak with someone at the organization to get an application as a form of initial relationship-building?**
- **Do you want them to be able to fill out an application without speaking to someone at the organization first for efficiency?**
- **Does it make sense to have tiered applications?**

APPLY!

CASE EXAMPLE

Volunteer Alberta heard from a local organization that they have implemented a two-part application process. The prospective volunteer fills out the first application to indicate they are interested in a position and provide basic contact information. Then, the organization reaches out to the individual to talk more about the position and the person's interest. After that, the prospective volunteer submits a second application which provides more detailed information about their skills as they apply to the role. The organization has found that this has reduced the amount of time spent processing applications of volunteers who end up not being that interested in the role. They have also noticed an increase in volunteer retention after implementing this strategy, as the volunteers they work with have greater buy-in to the organization.

When developing applications, reference the risk assessment and position description, and ensure you provide opportunities for the applicant to list relevant skills and experiences related to the volunteer role. You could also consider including an explanation, if you are asking for specific information, as to why you are asking for that information. For example, some applications ask folks to indicate if they identify as a woman, a BIPOC individual, or from the LGBTQ+ community.

This could be seen as an inclusive act, but some people from those communities, due to adverse experiences in the past, may be distrustful and may not want to identify as belonging to one of these communities before building a relationship with the organization. Explaining why you are asking for this information and how it will be applied in the review process may help applicants feel more comfortable applying to volunteer with your organization.

On that same note, consider reviewing your application for implicit biases. For example:

- Do you ask applicants to identify their pronouns? Do you provide an option for no pronouns or "name only"?
- If you ask for gender, do you list more than just "male" or "female"?
- If you include "non-binary," do you also include "two-spirit"?

We can't tell you if you should be asking for this information on your application, but if you do, consider why you're asking for it and whether it needs to be asked.

- Is this information directly related to the bona fide requirements of the position? If so, consider explaining why in the application.
- Is it for organizational data and evaluation? Or other reasons?

In general, your application form should:

- Collect basic information to process the application
- Ask questions directly related to the bona fide requirements of the position or assignment
- Respect human rights legislation
- Request reference information and consent if required
- Notify the applicant that the position may require a PIC or VSC should they move to the next step of the screening process after the application
- Some indication of the application review process – the timeline for hearing back from the organization and how long the application and onboarding process will take

You could even consider a virtual application such as a video application, digital storytelling, or maybe a presentation on something the volunteer is passionate about. Don't be afraid to get creative! Just ensure you are clear about what skills or information you are asking the applicant to demonstrate.

You could also include an information sheet or package attached to the application form, which outlines:

- The organization – who you are and what you value
- Description of the position or assignment, which could include a copy of the risk assessment

The above lists were adapted from Volunteer Canada's Screening Handbook

5. INTERVIEW

Like applications, interviews for virtual or remote volunteers will be similar to in-person volunteers, but there may be some slight differences or new challenges to overcome. The first step is to review your current interviewing processes and practices. Does anything need to change to fit a virtual interview? Will you accept a telephone interview or only video interviews? Why or why not? Does it make sense to facilitate a group interview?

Some things to consider might be:

Cybersecurity

Ensure preventative steps and risk management policies and practices are in place to protect the interviewee and the organization. Review our section above on cyber security and apply any relevant information to your interview process.

Accessibility

As discussed above in this resource, there are many ways you can make virtual spaces more accessible and accommodating. Review those suggestions and think about how you can apply them to a virtual interview. You might even ask the applicant if there are any accessibility supports they would like to request before the interview.

Technology

As with any online activity, technology is our best tool and sometimes our most significant challenge! Ensure you test your technology before you engage in online activities. Be prepared for the reality that there may be a small or significant 'lag' or delay in the video or audio. Think from an accessibility and risk management perspective and picture or practice different scenarios and how you would address them live. It's always good to have a backup plan for what you will do if the connection is lost or if microphones or cameras aren't working.

Body Language

As beneficial as virtual spaces are, there are some key differences in interpreting body language, facial expressions, or other non-verbal communication.

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> "Using a video platform is generally agreed to be more psychologically demanding than a face-to-face contact for a number of reasons including a greater need to concentrate and the… very close proximity of facial images and sometimes a bank of faces. It has been reported that individuals have reduced ability to interpret body language and cues, difficulty detecting humour and irony and difficulty relaxing into a natural conversation." (Williams, 2021).

It's important to keep this in mind while conducting online interviews or other online activities with volunteers and participants. It might help to build a little bit more time into the beginning of the interview for folks to get more comfortable and relax. Asking 'easy' or enjoyable questions that help break the ice is a good strategy. For example, at VA, one of the first questions we ask applicants is, "do you believe in ghosts?" We found that it helps break the ice and allows folks to be personal and relaxed.

6. REFERENCES

In keeping with the last two sections, the process of asking for and checking references for virtual volunteer positions will not change very much from in-person volunteer positions. Like applications, you could use an online digital reference form using the same program or software you used for the application. Review the [Screening Handbook](#) for their suggestions on reference checks and apply the same principles to virtual volunteers. One thing that is important to mention is that in a recent report by the Volunteer Centre of Calgary, **personal references were cited as the biggest barrier to volunteering for BIPOC individuals** who participated in the report. As stated in the report, "there are many possible reasons for this, but it does highlight the white western influence of volunteering towards a capitalist and institutional HR experience" (Mutamba, Rock, 2022).

As with all steps in your screening and engagement process, think intentionally and critically about tailoring the screening and engagement process to meet your organization's, your community's, or your participants' needs. For example:

> If you are processing applications for microvolunteering opportunities or other low-risk positions, are one or multiple reference checks necessary? Why or why not?

7. POLICE/BACKGROUND CHECKS

There is a lot of information and discourse on the appropriate uses of background checks in volunteer screening. This guidebook will not be able to provide a comprehensive overview of the current discourses around the use of background checks in volunteering, nor can we provide cut-and-dry recommendations of when volunteer positions should require a Criminal Record Check (CRC), Police Information Check (PIC) or Vulnerable Sector Check (VSC).

Refer to the section in this guidebook on position assignment and risk assessment. The Screening Handbook also provides a comprehensive overview of the differences between various background checks. We recommend you review that information, and with the tools and templates we provided on page 16, embark on an intentional and comprehensive assessment of risk for each of your volunteer roles to determine whether a CRC, PIC, or VSC is truly necessary for a particular role. In addition, think carefully and create policies and procedures to address what types of records might still allow the individual to volunteer for specific roles and which records would not be accepted.

'Background checks' such as CRCs, PICs, and VSCs have often been cited as barriers to volunteering by BIPOC individuals. MAVA found that "because of systemic racism within the criminal justice system, BIPOC individuals are more likely to have a blemish on their background check" and are therefore more likely to be 'screened out' of a volunteer position. "By requiring background checks, this systemic racism carries over into volunteerism" (Joyslin, 2021).

Organizations tend to use these checks to mitigate risk and liability, but as stated in a 2014 report by the Canadian Civil Liberties Association, "there is no evidence that broad use of criminal records materially reduces the risk of crime or violent offences in the workplace" (Canadian Civil Liberties Association, 2014).

Furthermore, in Alberta, there is no legislation to regulate what types of information should be disclosed on PICs and VSCs. The Alberta Association of Chiefs of Police (AACP) developed, endorsed, and published the Alberta Police Information Check Disclosure Procedures in 2019. These procedures seek to standardize police record check practices and limit the disclosure of non-conviction information such as withdrawn charges, mental health apprehensions, testifying as a witness, or even 911 calls. The AACP Procedures mirror the only legislation in Canada on this topic (Ontario's Police Record Checks Reform Act, 2015). In a report published by The Alberta Law Reform Institute (ALRI) in March 2020, they acknowledge:

> "Although the AACP Procedures lack the force of provincial legislation or policing standards (which have compliance mechanisms), the AACP has advised ALRI that the procedures have been adopted by all of Alberta's police services, and have the support of the Law Enforcement Standards and Audits program within Alberta's Ministry of Justice and Solicitor General" (ALRI, 2020).

However, they also identify some fundamental differences in the Ontario legislation and the AACP Procedures and areas where the AACP Procedures fall short in reasonably balancing public safety interests with an applicant's privacy and human rights. For a full comparison and discussion, please refer to the ALRI Report.

Unnecessary use of background checks and the absence of other, relationship-based strategies in volunteer screening processes such as interviews, training, and ongoing support and supervision can result in individuals abstaining from formal volunteering due to what they feel is an invasion of their privacy and the fear that they may need to provide explanations for their non-conviction records. In addition, "some individuals – particularly those in immigrant communities – are fearful of government and therefore would not subject themselves to a background check" (Joyslin, 2021).

Many organizations cite insurance or parent organization requirements as reasons they ask for or require CRCs, PICs, or VSCs. We encourage all Volunteer Engagement Specialists to become familiar with your organization's insurance policies and review them periodically for any changes that may affect your volunteer screening policies and practices. We hope the above information helps spark conversations in your organization about when CRCs, PICs, and VSCs are truly necessary and when they may be introducing unnecessary barriers.

Once you have determined that the role requires a CRC, PIC, or VSC, consider having support in place for volunteers to access these documents smoothly. For example, you could have a process document that outlines the steps for volunteers. This could include information on how to access CRCs, PICs, and VSCs in your region, or even an outline of what types of information may be included on CRCs, PICs, and VSCs that volunteers wouldn't typically be aware of. You may wish to review the AACP Procedures document for PICs and VSCs, and call your local police/RCMP detachment to ask about processes specific to their detachment. The ALRI Report also provides valuable information on what should and should not be included on background checks in Alberta.

As noted in the recruitment section, a situation may arise in virtual or remote volunteering when a prospective volunteer does not live in the same geographic region, province, territory, or country as your organization. Because there is no federal legislation regulating the use of CRCs, PICs, VSCs, or other types of background checks in Canada, each region will have a different approach to what information is shared on a background check and different steps to access them. Expect for standards to be different in other countries as well. It's important to consider whether you are willing to accept volunteers from different locations. This will affect several aspects of your screening policies and practices and may require volunteers to obtain CRCs, PICs, or VSCs from different regions.

8. ORIENTATION & TRAINING
Written by Drew Delbaere, Volunteer Manager with Fringe Theatre

Virtual orientation and training go hand-in-hand with virtual volunteer positions. If volunteers complete their work virtually, they will likely expect training to take place online. Barriers to travelling and meeting in person, such as public health regulations or geographic distance, may also necessitate a virtual approach to orientation and training. It also provides you with an opportunity to evaluate your volunteers' technological literacy skills and access to equipment that may be required for their role. As discussed in earlier sections, whenever planning or developing online content, be cognizant of things you can do to remove barriers, increase accessibility, and help guide those who might find navigating technology a challenge.

When creating training for virtual volunteers, it may be tempting to simply replicate an in-person session online. Although this can work in a pinch, it is often not the most effective way to train your volunteers. There are many factors to consider about online training that will likely change what information you choose to share with volunteers and how you choose to deliver the content.
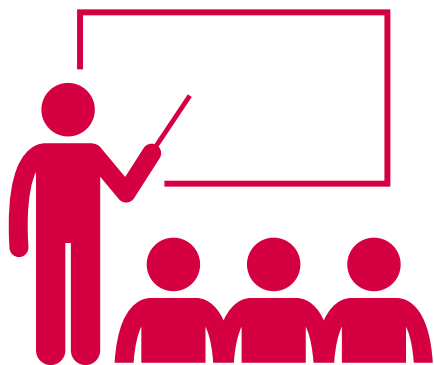
Create the Content

Start by developing your list of learning objectives. What information do your volunteers need to know to succeed in their role? If you have in-person volunteer positions, you have likely been through this process before. Feel free to draw upon existing resources but consider what might change for virtual volunteers. For example, virtual volunteers will still likely need to know the mission and structure of your organization, but they probably don't need a tour of your building or parking information.

Also, consider learning objectives that are unique to virtual volunteers. For example, do you need to train them how to access online tools, software, programs, and accounts, or set expectations for the professionalism they should exhibit when talking to clients virtually?

Don't forget to include learning objectives that aren't explicitly related to their volunteer duties. For example, an objective of orientation and training might be for a volunteer to meet other volunteers and feel like they are part of your community. Or maybe you want them to understand the impact of your organization's work on the people you serve. Although these may not seem as tangible as some of the previous objectives, it is important to identify them now since they will influence the creation of your online training.

Choose the Delivery Methods

Once you know what you want to teach your volunteers, you need to consider how you will train them. Online learning comes in two main formats: **synchronous and asynchronous.**

Synchronous learning happens in real-time; participants are learning together in the same online environment. An example of synchronous learning is an online video call or webinar where everyone attends and participates live. The advantage of synchronous learning is that it allows for interaction between you and your volunteers. For example, volunteers can ask questions in real-time, you can gauge their understanding and comprehension, and volunteers can work with each other.

Asynchronous learning is the opposite; participants engage with the information at their own time and pace. An example of asynchronous learning is watching a pre-recorded video or reading a handbook or training manual.

The advantage of asynchronous learning is that it allows volunteers to complete the learning on their own time and schedule and at their own pace. Volunteers can choose to review the content as often as they'd like and can split their learning into smaller, more manageable chunks.

There are several questions to consider when choosing between synchronous or asynchronous learning:

- How many volunteers do you need to train?

- Will you train all volunteers simultaneously, like for a special event, or will you offer ongoing training on a rolling basis?

- What is your capacity to deliver live training sessions or to create training tools like videos and online courses?

- What online programs and tools do you have available to you, or what budget do you have to acquire new tools?

- Are these tools accessible to your volunteers?

- How easy is it to gather your volunteers together at the same time? Are they all in the same time zone?

This is also the perfect time to refer to your learning objectives. Some learning objectives may suit themselves better to one of the formats. For example, if your volunteers must memorize, or at least generally remember, some essential information, it may be better to create a video or course that the volunteer can review multiple times.

Interaction and Evaluation

When creating online training, it is especially important to include interactive elements to keep your volunteers engaged while completing it. You may have experienced training or learning events where someone talked at you for a whole hour. Or maybe you've been asked to read a training manual that was pages and pages of unengaging text. Your virtual orientation and training can be better than that!

When leading live training sessions, use tools like breakout rooms to have smaller conversations, polls to get a sense of what volunteers know or have learned, and the chatbox or messages to ask questions or solicit ideas. Some tools that may be useful to add an engaging element to your training are [Miro](#) (a virtual whiteboard where many people can view and contribute to content at the same time), or [Mentimeter](#) (an interactive presentation software). Many of the same best practices of delivering in-person presentations apply to virtual training. Show videos and photos, share your screen to show volunteers how to navigate online tools and programs and encourage volunteers to follow along on their own devices. Remember to schedule time for breaks so everyone can step away from their screen for a bit.

When creating asynchronous learning tools, use a variety of media to present the information. Videos and photos can help break up text walls and grab a volunteer's attention. Audio clips or podcasts are often easier to create than a video and can achieve a similar objective.

Depending on the tool or program you use, you might be able to include other interactive features like labelled graphics, sorting activities, matching activities, scenarios or case studies, flip cards, buttons, timelines, and charts. Even simple tools like GIFs can be an engaging way to present information.

It can be more challenging to determine if your volunteers are achieving your learning objectives in a virtual environment. You may want to consider incorporating an evaluation to check their knowledge and understanding, especially for asynchronous learning. Many online courses include a quiz at the end to help ensure that the learner doesn't just click through all the content without engaging with it.

Your volunteers could also demonstrate their learning by working through scenarios, role-playing mock situations, or writing or recording a reflection. It may even be a good idea to check in with your volunteers after a certain amount of time in their role to ask whether they feel the orientation and training were sufficient and if there are any pieces of information or practice opportunities they would suggest adding or adjusting.
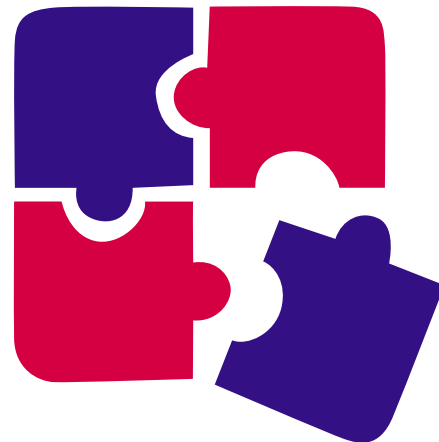
FRINGE THEATRE: CASE EXAMPLE

Fringe Theatre recently undertook a project to reimagine how they provide orientation and training for volunteers at the Edmonton International Fringe Theatre Festival. In early 2020, they received a [Digital Strategy Fund](#) grant from the Canada Council for the Arts to create an online learning platform and deliver virtual learning experiences to stakeholders across their organization, including staff, artists, and volunteers. The volunteer department recognized the opportunity to use the funding to transform how they train and support their volunteers. Traditionally, all training was offered in-person.

Before designing and developing online learning, the volunteer department consulted staff and leadership volunteers and analyzed volunteer survey data from previous years to explore current narratives about their training. In addition, they conducted an environmental scan through meetings and discussions with partners to explore how comparable organizations trained their volunteers. They also administered additional surveys about the training needs of new and returning volunteers. Once they felt they had enough data on their current orientation and training and how their staff and volunteers would like to see it changed, they began planning improvements.

One challenge that became evident during their assessment was that each volunteer team had unique training needs. The Fringe needed to tailor training to each team and have information that was broadly applicable. Volunteers also identified a need for scaffolding in their training, that is, having different training for new volunteers

and returning volunteers so that the returning volunteers would not have to go through so much repetition. Lastly, the staff and volunteers recognized the need for flexible, online training. Still, they didn't want to miss out on valuable team-building that happens at in-person events.

To address these challenges, they decided to make a clearer differentiation between orientation (information relevant to all volunteers) and team-specific training (unique information about a volunteer's role and duties). Since orientation applied to all volunteers, an asynchronous online course was chosen as the ideal delivery method. For team-specific training, they create four models to accommodate the needs of their teams:

- Model A: All volunteers complete team-specific training in-person;
- Model B: All volunteers complete team-specific training in-person, but online training is available for special circumstances (out of town or other travel barriers);
- Model C: New volunteers complete team-specific training in-person (online for special circumstances), and returning volunteers have the option of in-person or online training;
- Model D: All volunteers complete team-specific training online.

Most teams chose to adopt models B or C, but all models were selected by at least one team. They found these models provided the flexibility their teams needed while also standardizing the training process.

Given the challenges of planning a festival during a pandemic, at the time this resource was written, the Fringe had not been able to realize their new training models yet fully. Instead, they took an incremental approach to updating orientation and training. In 2021 they focused on moving orientation to an online, asynchronous format but delivered team-specific training in-person or through a live video call. Even though they hadn't implemented all their plans, they received lots of positive feedback from volunteers about their blended learning model. They plan to introduce the team-specific training models at a future festival.

FRINGE LEARN

As part of the grant-funded project, Fringe Theatre created an online learning platform called Fringe Learn. Formal online learning is typically comprised of two parts:

> **Authoring Tool**
> *(software or apps to create online learning)*

> **Learning Management System (LMS)**
> *(a tool to administer, track, report, and document the delivery of online learning).*

Some tools offer an all-in-one solution that allows you to create and deliver online learning in the same program.

For Fringe, it was essential that the tools they selected allowed them to create interactive and engaging online learning experiences. The volunteer department had previously experimented with [creating an online course through Better Impact](), their volunteer management system. There, you can add text, videos, and quizzes. There is also an option that will allow volunteers to access and apply for new opportunities once they have completed certain aspects of training.

However, Fringe wanted something with more capacity for interactive elements, branding, and design capacity. They chose Articulate 360 as their course authoring tool and used a WordPress plugin called LearnDash, along with additional customizations, for their LMS. Both tools accommodate responsive web design, meaning learners can access the site and courses on a computer, tablet, or mobile device.

In 2021, Fringe delivered <u>two</u> online courses to volunteers:

- *Volunteer Orientation*

- *Creating a Consent Culture*

> *Volunteer Alberta's*
> [*Screening Development Grant*]() *could also be used to update or enhance virtual training!*

The latter course was developed in partnership with the Sexual Assault Centre of Edmonton (SACE) and is part of Fringe Theatre's Safer Spaces program. At the beginning of each course, they clearly outline how long it will take to complete the course, what materials the volunteer will need to complete it, the learning objectives, and what the volunteer needs to do to complete the course. Course completion can be based on viewing a certain number of lessons or achieving a passing score on a quiz. For the orientation course, volunteers had to score 90% or greater on a 20-question quiz to finish the course. The quiz could be repeated as many times as necessary to pass.

The feedback from volunteers about these online courses was overwhelmingly positive. They appreciated the ability to complete them on their own schedule, at their own pace, and from the comfort of their home. The orientation course had a completion rate of over 95%, which was much higher than the attendance rate at the former in-person orientations. Fringe plans to continue expanding their course offerings for future festivals.

Fringe Theatre has shared a link to a basic sample course template, and has provided some screenshots of their courses, so you can see some of the possibilities!

What is your top tip for a new volunteer?

Ally Whittaker, Information and Merchandise

▶ ●————————————————————— 00:23

Just embrace the chaos. Let yourself laugh and have fun while you're at the Festival. Don't be afraid to ask questions or look at your fellow volunteers or Team Leaders for help. There's just like so much going on at the Fringe at any given time and we all understand how overwhelming it can become on that first day; but, if you just smile and have a good time, then you'll get through it just fine.

Volunteer tip from Fringe Theatre's online sample course

Quiz example from Fringe Theatre's online sample course

Teams example from Fringe Theatre's online sample course
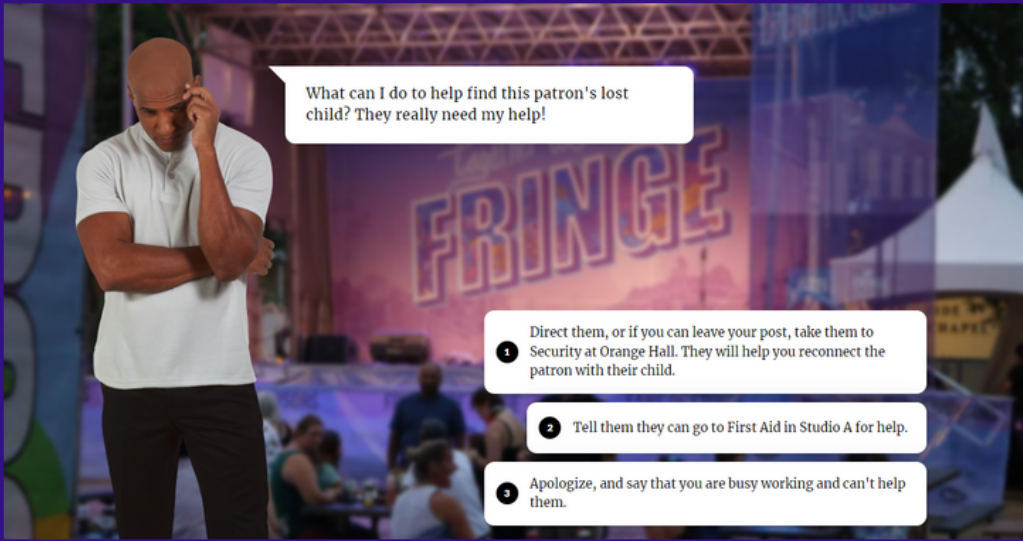
Scenrio example from Fringe Theatre's online sample course

9. SUPPORT AND SUPERVISION
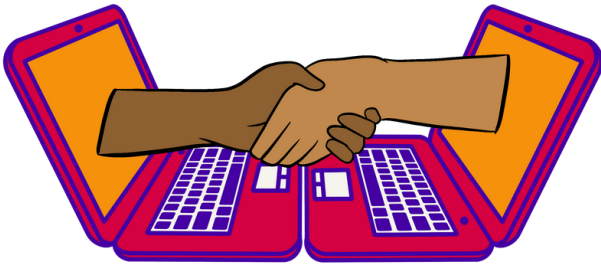
Transitioning support and supervision from in-person to a virtual or remote model will require an intentional approach to develop a sense of teamwork and reciprocal accountability between the organization and volunteer(s). A common motivating factor for people who volunteer is to be connected to a community and gain a sense of belonging. Moving to a virtual or remote model may worry some volunteers that the community connection they're seeking will be a challenge.
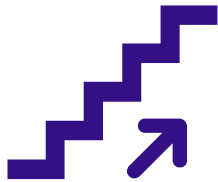
Fortunately, there are ways to overcome these challenges! The first step is to identify who in your organization is responsible for supporting and supervising volunteers in particular roles. You'll also want to come up with a backup plan if that individual calls in sick one day or transitions out of the organization. Then, consider how often you want or need to check in with your volunteer. This may change depending on the role or even the specific volunteer. Some may need more or less support and supervision depending on their qualifications, skills, comfort level, and the level of risk associated with the position. Consider including the volunteer in this decision.

If you've reviewed the Virtual Volunteer Risk Assessment Matrix you will have noticed the low-risk category includes the following description:

> "Supervision by a paid employee or fully trained/screened volunteer is present at all times through real-time communication methods (Teams, phone, etc.) and a solid plan is in place for when a volunteer must contact supervision for immediate concerns/support."

We recognize that not all roles require constant contact, and this matrix cannot address every variable. However, if you have decided that a role does require real-time lines of communication, ensure you still have periodically scheduled check-ins to provide overall support instead of only responding to crises or in-the-moment questions. Phone calls and texts, email, Teams, or Zoom, are all tools you can use to provide direct one-on-one support and supervision to your volunteer(s). Another method you could use to provide ongoing support or supervision to a volunteer is to schedule a Google Form to be filled out at an interval of your choice. It could include questions relating to the volunteer's capacity and whether they have time to take on more work, how comfortable they feel in their volunteer role, or whether they have any questions or concerns they'd like to discuss with the supervisor directly.

There are many different online platforms that can be the basis for your online community, and the above are only a few examples. But the important thing to remember is that just because there is an online space where volunteers can gather, chat, share stories and support one another doesn't mean they will. It is up to the organization, or perhaps some experienced mentor-volunteers, to establish and model an intentional culture of engagement and support. The space may also require monitoring and moderation by someone from your organization to ensure it's a safe space and group rules are being followed.

We also suggest reviewing pages 43-44 in the [Screening Handbook](#) for more general information on volunteer support and supervision. Although the Screening Handbook emphasizes standard of care and liability in providing support and supervision, we encourage you to think of support and supervision as a benefit to the volunteer; to ensure you are helping them to meet their volunteer goals and have opportunities to learn, grow, and connect with others.
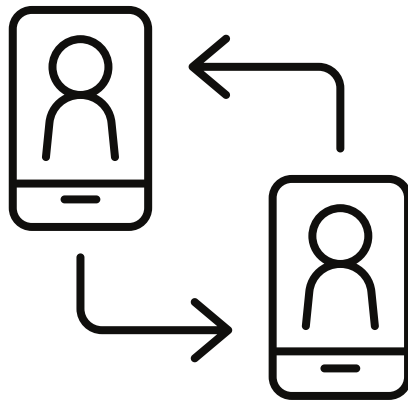
When developing your approach to supervision with volunteers, consider the 5W's of supervision and support:

Why
Why would your volunteers need supervision and support?

This may seem straightforward, but try to think about this from a user perspective. As a volunteer, what would happen if they didn't have support? What need would that absence highlight? This can help illuminate some of the key concerns you might have when supervising and supporting a volunteer. What would happen if you didn't supervise your volunteers when they do their work? They might not do the work in a good way. They might feel overwhelmed and like they don't have anyone to talk to. They might feel aimless. So, the answer to that why question could be: to ensure the volunteer is doing their work in a good way, to give the volunteer a person to reflect on their experience with and provide direction to your volunteers.

What
What does supervision and support of your volunteers look like?

Every organization and volunteer is different. This is where you start to think about, realistically, what a volunteer manager will be doing from day to day to supervise and support. At a high level, this could be keeping an eye on how a volunteer is doing, assessing if they are engaged or a good fit for the role. More specifically, it could be offering technical support if a volunteer looks like they may need it; providing all necessary process documents, materials, and tools for them to do their work effectively; giving constructive criticism or encouragement when needed; altering day-to-day duties if the volunteer is struggling, and so on. You may not have to start from scratch in answering this question, as supervision and support will be informed by your organization's unique processes and policies.

Who
Who will be responsible for supervising and supporting volunteers?

Do you have a volunteer manager to do this? Is it other volunteers? Is it a board member? It's important for people to know what they're responsible for to provide good support and supervision, so ensure this information is laid out clearly in advance.

When
Do you have a timeline for any related activities?

It's important to know what your schedule is. To determine this, there's a host of different questions to consider:

- When does the supervisor need to be available?
- Are they available to answer questions outside of their supervision shifts?
- Have you planned time for preliminary activities and made time to prep things like technology or software, the space the volunteer is working in, etc.?
- And how long is this commitment? Are you doing it for an event, or is this ongoing?
- Does the length of commitment affect how you offer support?
- Do you support a volunteer the same way if they're not looking to volunteer long-term?

Where
Where will the supervising need to be done, and what are your boundaries?

With a move to virtual spaces, it's easy to meld personal and professional communication methods. So, it's important to think about 'where' or which type of technology or software you'll use to provide supervision and support to your volunteers and set clear boundaries and expectations for communication. For example, maybe the volunteer role is virtual or remote, but the volunteer wants to have supervision in-person. Will you accommodate that or set it as an expectation? What are the limits of your support and supervision? Do the supervisor and volunteer need to have rules about what work is off-limits? Things the supervisor can't do for a volunteer? Answering these questions can help set a dynamic between supervisors and volunteers that includes healthy boundaries.

10. FOLLOW UP & FEEDBACK

Volunteer screening and engagement is an **iterative process, meaning it's important to review your policies and practices regularly and update or improve them.**

- When was the last time you checked in with program participants or their families about their experience with your organizations' volunteers, virtually or in-person?

- Do you have a process in place to seek feedback at regular intervals?

- Have you spoken to your volunteers to elicit feedback about your virtual volunteer screening and engagement process as a whole?

Review in the Screening Handbook for their tips on follow-up and feedback. Again, we would add that while follow-up and feedback are important to evaluate your programs and services, and risk management, it is an important opportunity for you to engage your community and stakeholders to ensure that both your organization and your volunteers are following good practices, guided by your community.

One method of collecting feedback from volunteers is through a survey. Surveys can be distributed to volunteers on a yearly or twice-yearly basis (or more or less as you see fit) to help gather information about how volunteers feel about their work.

Surveys can also be sent after a special project or event. It's up to you! Building surveys and data collection is a field of study on its own. We can't tell you exactly how to make the best survey, as it depends on your needs.

Good Practices

Only gather information you'll use	Try not to collect information you *might* use. Think about what you need to know and design your questions to gather this data specifically. This is relevant because of the Personal Information Protection Act (PIPA) and Freedom of Information and Protection of Privacy Act (FOIP). It is good practice not to gather personal information or feedback that you don't need. It makes it harder to interpret the survey later, takes up the volunteer's time, and could breach privacy.
Keep it short	The ease in which a volunteer can give feedback can help volunteers reflect positively on the feedback process, so make it easy for them and encourage them to want to give feedback.
Pick question formats that suit the information you need	Use multiple choice for questions with a limited number of answers, open-ended for qualitative data, number fields for quantitative data, etc. Think about what data you need and how the question format gathers it.

If you're in the process of rolling out a new program or volunteer position, it could also help to gather a small group of volunteers to answer questions about their experiences in a virtual focus group format. This can be a valuable way to garner qualitative data about your volunteer program.

Here are a few tips for setting up a focus group:

Keep it informal

This shouldn't be a scary process, especially for volunteers. ✓

Have a good facilitator

The person running a focus group must know how to guide the conversation and create safe or brave spaces. Otherwise, things can get off track quickly, or something may be said that is harmful to people in the group. VA has created a [Facilitation Tip Sheet](#) to help with this! ✓

Approach questions from a strengths-based perspective

Humans have a strong negativity bias, and it's easy to get stuck only talking about the things people don't like or have challenges with. Framing questions from a positive perspective will still uncover those challenges and will focus the conversation from a more positive or actionable perspective. Be aware though, that only talking about positives may result in people who are struggling not feeling heard. It's a balance, which is why having a good facilitator is so important. ✓

We encourage volunteer engagement specialists to, whenever possible, build an individual relationship with your volunteers. Try cultivating a relationship with your volunteers where you can just call them and ask what they think about certain aspects of their role. People, generally speaking, know what they need and will be able to tell you if and when they're asked directly. This can be in the form of a check-in, where you schedule a short, regularly occurring chance to talk to your volunteer about how they're feeling and doing.

Or it can be a more informal type of individual discussion where you meet about issues when necessary (there's some overlap here with general support and supervision, as that's also a way to get feedback). To stay equitable though, not everyone is okay with this kind of closeness in a volunteer role. And that's okay. That means it's also worthwhile to have a mechanism to provide feedback anonymously if people prefer. You could do this through a survey or anonymous feedback form.

Now that we've talked about how to collect feedback, it's also important to think about how to use the feedback you have collected. Over the next few pages, we'll present two models you can use to review and use the feedback you've collected.

THE LEARNING LOOP

"The Learning Loop is a tool that helps you to define how the work you do now informs what you do next. It provides a high-level perspective on how implementing social change can be broken down into a gradual process of iterative cycles"

Learning Loop – Development Impact and You (diytoolkit.org)
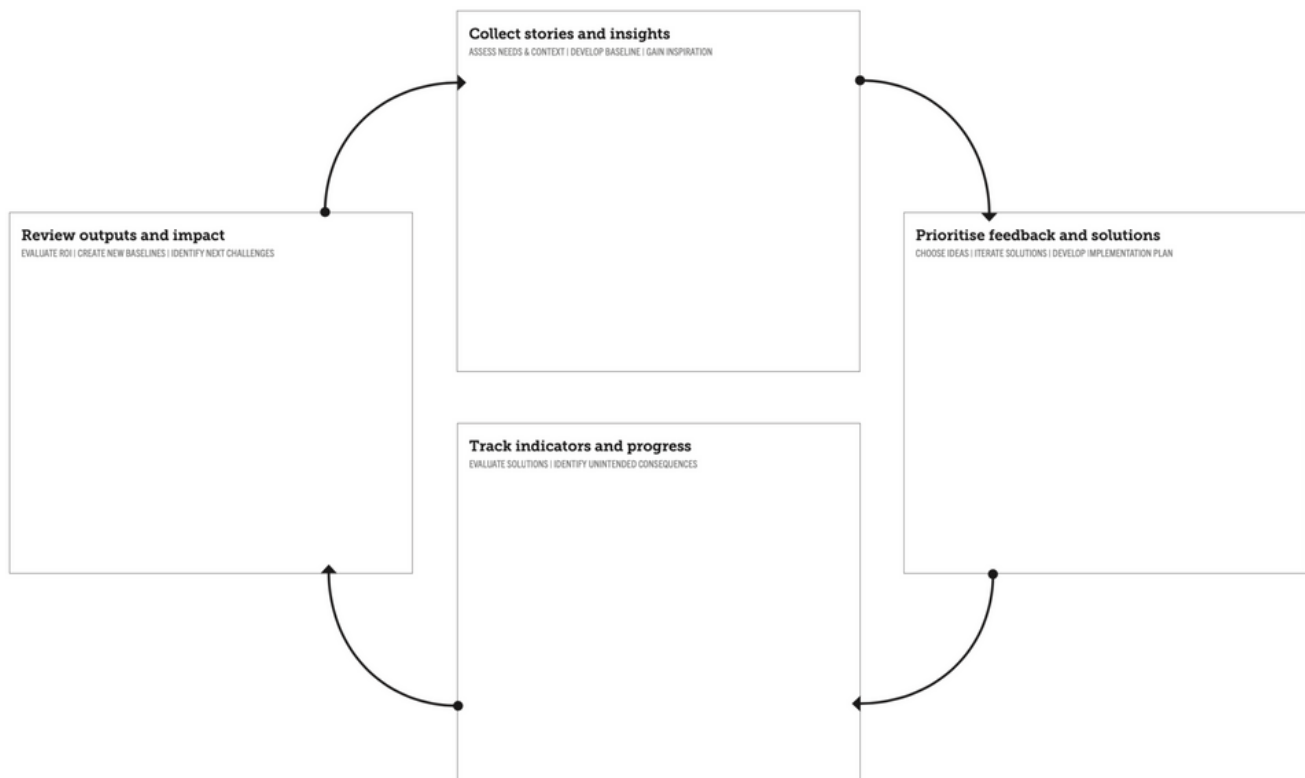
We've borrowed the below template from the DIY Toolkit. Start with "collect stories and insights" and work your way through the loop from there. Click the link in this box learn more about how to use this template, and download your own copy which you can print out and fill in yourself!

DIY 06

LEARNING LOOP

I want to develop a clear plan
by improving upon what I've done before

Collect stories and insights
ASSESS NEEDS & CONTEXT | DEVELOP BASELINE | GAIN INSPIRATION

Review outputs and impact
EVALUATE ROI | CREATE NEW BASELINES | IDENTIFY NEXT CHALLENGES

Prioritise feedback and solutions
CHOOSE IDEAS | ITERATE SOLUTIONS | DEVELOP IMPLEMENTATION PLAN

Track indicators and progress
EVALUATE SOLUTIONS | IDENTIFY UNINTENDED CONSEQUENCES
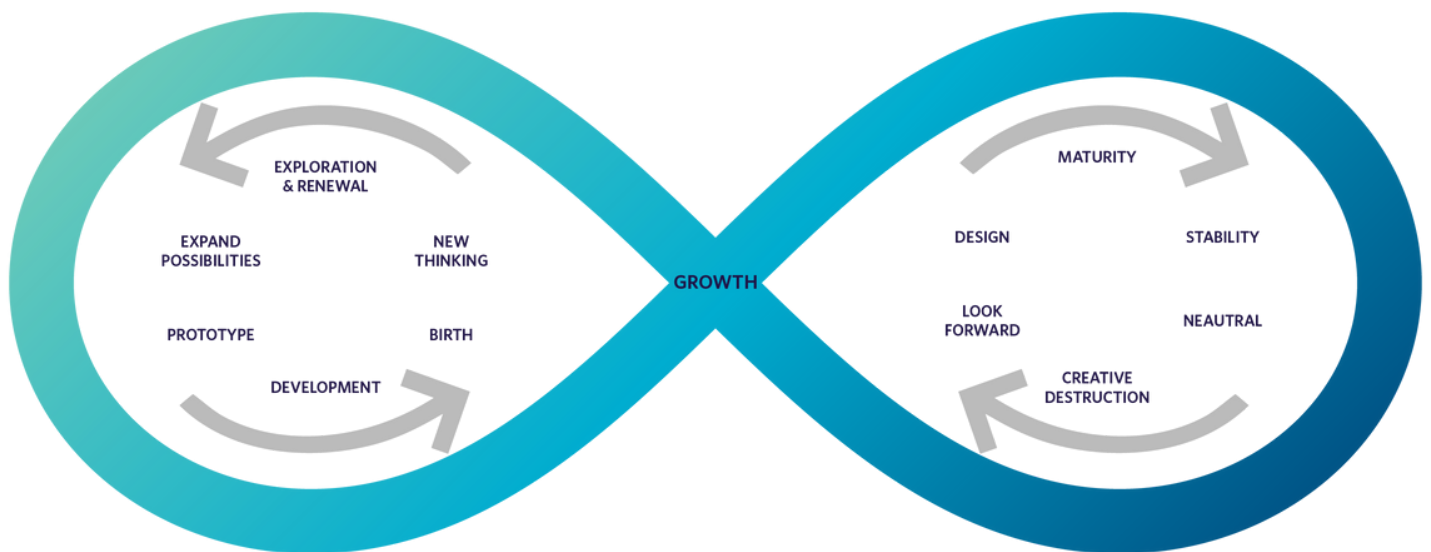
THE ADAPTIVE CYCLE

The adaptive cycle (also known as the ecocycle) is meant to be a sense-making and planning tool. It helps make sense of the different dynamics we see and experience as part of social systems. This tool invites us to focus on creative destruction and exploration in addition to typical themes regarding development or maturity. The adaptive cycle makes it possible to spur agility, resilience, and sustained performance by including all four phases of development in sense-making and planning processes.

Adapted from: https://www.liberatingstructures.com/31-ecocycle-planning/

EXPLORATION
& RENEWAL

EXPAND
POSSIBILITIES

NEW
THINKING

GROWTH

PROTOTYPE

BIRTH

DEVELOPMENT

MATURITY

DESIGN

STABILITY

LOOK
FORWARD

NEAUTRAL

CREATIVE
DESTRUCTION

The adaptive cycle differs from the learning loop in that each part of the loop creates an opportunity for growth. Using this model, the feedback you receive from a volunteer as you engage and work with them can become useful for growing a number of other processes in your volunteer screening work.

So, if we think about a volunteer program as a whole, its life cycle can be tracked using an adaptive cycle:

A volunteer program or a new iteration of a volunteer program starts with exploration and renewal. As you explore what your volunteer program needs to be, you think about what is in scope and not in scope to figure out what is possible.

Then you try it out. You make the program you were exploring a reality. You bring in volunteers to their roles and see how it goes. The program operates and develops as you go. You try to spot any issues along the way. And there you have it! You have a volunteer program. And these processes obviously lead to growth.

But, as with any program, things can become stagnant. At this point, you start to remove what you don't need and shake things up to reinvigorate the volunteer program. Looking forward, you start to grow again because you explore new ways to structure the program to fit your new needs and thinking.

And for a while, your program is humming along, and the processes you designed are becoming locked in. You've reached a point of maturity where things are fairly stable and what you planned is working.

Follow-up and feedback are complex duties that require some systems thinking. These tools are a great place to start mapping out your process, help make sense of it, and guide your activities in an intentional way.

RE-ENGAGEMENT

There is so much overlap between the 10 Steps to Screening that it might be helpful to think of screening as a cycle rather than a series of steps. For example, re-engagement of volunteers can fall under follow-up or even your recruitment strategy. One way to re-engage former volunteers is to follow-up with them and offer a new position.

Some volunteers can grow bored of their position or feel they are no longer learning or growing in the role, but if you have an opportunity to offer something that might spark newfound interest, it can be a great way to retain volunteers. This also works for current volunteers if the volunteer has grown to the point that a new position might be appropriate. Maybe they were doing front-line work for long enough that they could offer some real insight for a committee or the Board!

RECOGNITION

Although recognition isn't one of the ten steps to screening outlined in the Screening Handbook, it is an integral component of screening and engagement. **Recognizing volunteers' efforts is key to retaining them as volunteers**, and retaining more volunteers will impact your recruitment strategy, training processes, and support and supervision. Research has shown that recognizing volunteers doesn't have to be complex or expensive. Some of the most effective ways to recognize a volunteer is to send them a hand-written (or typed!) thank-you note from staff, other volunteers, or participants. A neat way to facilitate virtual thank-you cards is through a website such as Group Together. There, you can designate the occasion, who you are thanking, and send a link to others to add a personalized note, picture, or GIF to the virtual card. There are many free online services that can facilitate an online group card, Group Together is just one. You could even have staff, other volunteers, or participants record thank-you videos or audio messages and send these to volunteers through email or whatever online community space you are using.

One example of a micro-inclusion is to ensure you do not schedule volunteer training or recognition events on important holidays for different faith or cultural groups.

You can add faith and cultural holidays to your Outlook or Google calendars in just a few easy steps.

If you're interested in hosting a volunteer recognition event of some sort, refer to our sections on virtual training and orientation or virtual volunteer fairs for some guidance on how you could organize or facilitate this type of event.

CONCLUSION

We hope this guidebook has provided a solid foundation for beginning or enhancing your virtual volunteer screening process. We recognize all organizations are different and that the good practices presented in this guidebook may not apply to everyone. If you see information in this guidebook that should be changed or updated, or if you notice any important information is missing, please reach out to us!

screening@volunteeralberta.ab.ca

Other Volunteer Alberta Resources on Virtual Programming:

- Why I embraced virtual programming: How I learned and connected with peers online during Youth @ the Table

- Volunteering during COVID-19: Experiences from the network

- Volunteer Engagement – Building Community Online

- Re-thinking volunteer engagement during a pandemic: Virtual volunteering

- 6 ways to recognize volunteers during a pandemic this National Volunteer Week

- Strategic planning online: Lessons and recommendations for your nonprofit

- Successful Online Communications Means Thinking Like a Person, Not a Business

Volunteer Alberta Tip Sheets

- Tip Sheet - Good Practices: Sharing Volunteers

- Sharing Volunteers: Conversation Guide

- Tip Sheet – Good Practices: Screening During a Pandemic

- Tip Sheet – Good Practices: Volunteering During COVID-19

- Tip Sheet – Good Practices: Volunteer Screening

Other Resources on Virtual Programming

- Volunteer Canada: Virtual Volunteering

- Indigenous Guardians Toolkit: Virtual Community Engagement Guide

- Best Practices to Follow for Virtual Volunteers

- Volunteer New Hampshire: Engaging Virtual Volunteers Toolkit

- Edmonton Chamber of Voluntary Organizations – Virtual AGMS: Yes, You Can! A Virtual AGM Facilitation Guide

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