

Tier II Training

Course Description: This training will help Newfields Staff who directly interact with volunteers in their department as part of their position and daily routine, maintain and deepen positive relationships with volunteers as they embrace them and their contributions to the mission.

Goal: To help staff who work directly with volunteers build effective and positive relationships with our volunteers but also understand the healthy boundaries and differences between staff and volunteers.

Materials Needed: Whiteboard, dry erase markers, Volunteer Protocol example, Manager of Volunteerism job description/example, blank Volunteer Protocol sheet, Volunteer Corrective Action Process handout/sheet

Content Outline: *Italicized sentences are spoken aloud.*

- **Intro and Welcome**

- *Why are we having this training?*

- *This is the second level of training for staff in regards to Volunteer/Employee relationships. It is the result of our Volunteer Management Audit and Action Planning Process that took place from August 2017 to June 2018.*
- *The Volunteerism Department was rated in different areas and each area was given a score out of 4. The lowest score was in Volunteer/Employee relationships, which only scored a 1.6.*
- *Following this audit, the Volunteerism Department was given an action plan on how to improve Volunteer and Employee Relationships. The first part of this was the Tier 1 Training, which is basic training given to all staff on what our Volunteerism Department does for us here at Newfields, our expectations for volunteers and staff and how to handle basic interactions with volunteers.*
- *The next part of this plan is Intermediate Training for staff who work directly with volunteers or Tier 2.*
- *Our goal for Tier 2 is for staff to develop and maintain positive relationships with our volunteers but also to understand the differences between staff work design and our volunteer opportunities. We want staff who directly interact with volunteers to understand the extent of what our volunteers do for us but also the boundaries and different work and generational styles that must be recognized.*

- **Review of Tier 1 Training**

- *Before we start the intermediate training, let's review what was covered in the Tier 1 presentation.*
- **Repeat Newfields Mission**
 - *Our Mission: To enrich lives through exceptional experiences with art and nature.*
 - *Ask participants how volunteers contribute to our mission. Discuss w/ notes on whiteboard.*
- **Hourglass Visual Aid**
 - *What we do as staff filters down to what volunteers and guests see and experience here. Our volunteers are often going to be on the frontlines and directly interacting with guests. We are not only holding our volunteers to certain expectations but ourselves as well.*
 - *When staff, such as yourselves, are directly interacting with volunteers on a regular basis, it is up to you to be the example on how staff should be interacting with volunteers and to understand what Newfields is trying to achieve with volunteerism.*
- **Our Vision for Volunteerism**
 - *Our volunteerism model is focused on increasing capacity, not replacing staff.*
 - *Why would we want to do this?*
 - *As Newfields grows both as a campus and as an institution, there is little to no time or bandwidth for staff to complete certain assignments or tasks. Embracing volunteerism helps increase our departmental capacity so that staff can find a better work life balance and not feel overworked.*
 - *Staff do not need to be worried about losing their jobs. Staff who embrace volunteerism will have this success not only reflected in their performance reviews, since this directly affects the success of working to achieve our mission, but also in the relationships that they build with the volunteers, guests and co-workers.*
 - *We want Newfields to be a place where volunteers and staff can rely on each other to help the campus and institution grow.*
- **Discussion:** Have discussion and reflection with participants over following questions and write their answers on the whiteboard
 - *Why do we need specialized volunteer positions?*
 - *What specialized or departmental volunteer positions can you currently think of?*
- **Reflection:**
 - *Start thinking of:*
 - *Why your specific department has volunteers?*
 - *How do you interact with volunteers you regularly see?*
- **Volunteer Opportunities We Provide**

- *Up until a few years ago, the primary position the volunteer program offered was the Information Desk and later the Information Guide and Ambassador positions. We realized that was not wholly engaging for every volunteer and that we needed to expand the program to serve multiple skill sets and talents. The Volunteerism department is constantly trying to learn and evolve so that both volunteers and staff are satisfied with our efforts. We want to grow not just be stuck in a cycle.*
- **Onboarding Process**
 - *Let's start by reviewing the process of becoming a volunteer here at Newfields. Remember, not only does staff have an onboarding process, volunteers have one as well. We want to make sure our volunteers are qualified and know what to expect from Newfields and the Department they will most closely work with.*
 - **Activity:** *Ask participants to list what they think the onboarding process looks like on the whiteboard and compare their ideas with the actual process.*
 - Application
 - *The applicant reaches out to the Volunteerism Department and is directed to fill out our application that indicates passions and preferences.*
 - Review for Fit
 - *The volunteer's application is reviewed for fit of the institution. Their indicated preferences have been considered, as well as need.*
 - Interview
 - *If it seems like a good fit, an offer to attend a group interview to assess qualities and passions in further detail will be extended. If we believe that the applicant would not be a good fit for whatever reason, we extend communication that currently we do not have a place for them and that we encourage them to re-apply in 6 to 12 months.*
 - Orientation
 - *An orientation is held for the volunteers to get them integrated into Newfields. This orientation mimics the staff orientation but also includes details on all opportunities for volunteers at Newfields.*
 - Ambassador Training Sessions
 - *Ambassadors schedule one-on-one training sessions with Lead Volunteers in order to prepare them for volunteerism in this role.*
 - Fully Onboarded

- *After the volunteer feels comfortable, they are fully onboarded. However, training and check-ins don't stop because that is an essential part of keeping them knowledgeable and both them and the organization satisfied.*
- **Newfields' Volunteerism Road Map**
- *When we had a very select number of volunteer positions, we were stuck in a cycle, a cul-de-sac if you will. Now, as the program has changed and grown, we are more of a road map, with different ways and exits for volunteers to get where they want to go and be fulfilled. Volunteers have different skill sets, availabilities and backgrounds much like our staff. In order to make sure that our program is wholly engaging while also controlling expectations, different volunteers will start at different opportunities depending on what we will believe will be the best fit for them. We want our volunteers to start at a level that both they and the organization are comfortable with.*
 - Group
 - Episodic
 - Seasonal
 - Regular/Consistent: Working in Programs, Services, Events, Exhibits, Galleries and Gardens
 - *Ambassadors and Information Guides: Ambassadors are volunteers who are stationed at the entrances to the galleries and gardens and make sure guests are welcomed and assist them in any way they can.*
 - *Special Events: Public Programs*
 - *Specialists: Garden Guides, Docents, Department, etc.*
 - *Lead Volunteers: Lead Volunteers help the Manager of Volunteerism with some scheduling and management. Volunteers must have given at least one year of service before requesting to take part in the Lead Volunteer Program. These volunteers help in the onboarding training, communication with other volunteers, and partnering with the Manager of Volunteerism in coaching opportunities.*
 - Highly Skilled Pro-Bono (HSPB) Volunteers

- Specialists
- Governance and Leadership
 - Advisory Committees
 - Board of Governors
 - Board of Trustees
- **HSPB (Highly Skilled Pro Bono)**
 - *HSPB volunteers are volunteers who lend expertise in highly skilled areas. Their volunteer path will be fast tracked depending on what skills and specialties they bring to the table. If they are an expert in gardening than we would place them in touch with the Manager of Horticulture Volunteers. If they are a lawyer or have connections with other organizations in the city and are interested in supporting Newfields, we might extend them an invitation to get involved with our Board.*
- **Provide real life examples of Volunteer Road Map**
 - **David Bryant**
 - *Disconnected from the program because he was not happy about how it was run but later reconnected when the program was revamped and is now a Lead Volunteer.*
 - **Sharon Gamble**
 - *Started working as a Winterlights volunteer and is now a Lead Volunteer.*
 - Pictures
- **Discussion**
 - *Why is it important to guide volunteer expectations?*
 - *Why do you think we have HSPB volunteers?*
 - *What questions do you have so far?*
- **Staff vs. Volunteer Responsibilities**
 - *Since Newfields has such a robust volunteer program now, there are certain laws and protocols that Newfields must follow as an institution to make sure there is a difference between staff and volunteer responsibilities.*
 - **FLSA Law**
 - Fair Labor Standards Act
 - *This is a law that essentially guarantees employees minimum wage, overtime pay, prohibits child labor, etc.*
 - *Volunteers are not covered by FLSA so they can't do the same work as a regular employee and vice versa.*
 - **The culture of Volunteerism at Newfields and the reality of FLSA Laws**
 - *The FLSA ensures that anything that is already an assignment under a paid position can't be an assignment for*

a volunteer. This holds both the institution as a whole and the Volunteerism Department accountable for the opportunities we provide volunteers and what type of assignments they can sign up for.

- *This means that we must ensure that work design for both staff and volunteerism is clearly defined and has as little overlap as possible. We want there be black and white differences so that we are not liable for a lawsuit.*
- *If for some reason the institution decides to remove a paid position, the duties that fall under it do not automatically go to volunteers. It will depend on the situation but most likely they will be delegated to other members of the same department and possibly a new position. If in a few months after the removal/replacement there are assignments that regular staff do not have the time or capacity to fulfill, they will be considered to be moved to the volunteer program.*

○ **Volunteer Work Design vs. Staff Work Design.**

- Activity: Compare and contrast the Lead Volunteer Protocol sheet with the Manager of Volunteerism job description.
- Write on a whiteboard and ask participants what stands out about each of the descriptions and what similarities and differences they notice about them.
- **Navigating Volunteerism as a Newfields Staff Member**
 - *This has been and will continue to be reiterated throughout the training, but staff members are the example. While there will be differences in your responsibilities, volunteers are looking to you for guidance in your specific departments and will likely have assignments that will have you collaborate with them.*
 - *Don't be afraid to ask questions yourself. If you are unsure about how volunteers interact with your department or how to handle a certain situation, feel free to contact the Manager of Volunteerism!*

• **What Opportunities Are in Your Department?**

○ **Volunteer Work Design Activity**

- Walk through the Volunteer Position Description Template (Blank)
- Provide an example of a completed volunteer position proposal
- Use the blank template to construct a new volunteer role for your department
 - Discuss what they came up with, if any positions were similar and what challenges they had in designing these new volunteer opportunities, as well as what verbiage/language to use

- **What Happens When Boundaries Are Crossed?**
 - *Even in an institution such as ours, conflicts between volunteers and staff or guests can arise. While we hope such conflicts don't occur, they still can happen and it is vital for staff, especially those who interact directly with volunteers, to know how to handle such situations.*
 - **Policies and Procedures for Volunteers**
 - *Volunteers are expected to know and follow certain organizational policies. We want our volunteers to be dependable and trustworthy and we do have certain expectations for them, such as:*
 - *Being on-time, accountable and logging their attendance into Volgistics.*
 - *Wearing their issued badge and appropriate dress for their position.*
 - *Understanding Newfields' Non-Harassment, Equal Volunteer Opportunity, Non-Solicitation/Distribution and Confidentiality policies.*
 - *Understanding that Newfields requires a background check to be completed on all prospective volunteers*
 - *Understanding that Newfields reserves the right to terminate a volunteer's connection with the organization at any time.*
 - **Corrective Action Process**
 - **Activity:** Ask participants what they think the corrective action process looks like. Write answers/steps they suggest on the whiteboard. Compare it to the actual process.
 - *The Corrective Action Process for volunteers is based off the one that staff follow. If you believe that a volunteer is not following or is violating organizational or departmental policy and procedure in any way, the first step is to inform your immediate supervisor. It is not your job to correct/coach the volunteer in most cases and often the corrective action taken is just a conversation rather than a formal warning.*
 - *If it is a more serious matter, a formal verbal or written warning may be given with formal coaching as well.*
 - *If corrective action is not adhered to, the volunteer will be removed from the Volunteer Program and a letter may be given summarizing all previous corrective actions and specifics problems that warranted the termination. Such problems include:*
 - *Failure to adhere to Volunteer Handbook guidelines*
 - *Poor or inappropriate conduct on duty*
 - *Any breach of confidentiality*
 - *Conduct off duty that would adversely affect Newfields*
 - *Reporting to an event under the influence of drugs or alcohol*

- Theft
- Regularly being late or not showing up at all

○ Scenarios

- **Scenario 1:** *A volunteer who is stationed in your department is continually showing late for their shift and has twice, without calling in or notifying your supervisor in some way, not shown up at all. What should you do?*

- Bad Outcomes:

- You do nothing.
- Tell the volunteer off, get mad at them.
- Complain about it loudly to your co-workers in front of the other volunteers.

- Good Outcomes:

- Tell your supervisor about what is going on.
- Express concern for the volunteer and ask if everything all right and if there is something you can help out with.

- **Scenario 2:** *It is Winterlights and you see a few volunteers having a drink together out in the gardens with some of the guests. You are not sure if they are on duty. What do you do?*

- Bad outcomes:

- You do nothing.
- Tell them off, get angry, kick them out
- Join them

- Good Outcomes:

- Check to see if they are on duty.
- If they are, notify your supervisor so they can take corrective action.

- **Scenario 3:** *You have noticed that things around your office have started to go missing such as snacks, office supplies, a few desk knick-knacks and now some information about the museum's operations. Things have been disappearing when a particular volunteer is on duty. What do you do?*

- Bad Outcomes:

- Do nothing
- Confront your suspect personally, get angry, try to search them
- Try to get back only your stuff
- Email, text or call them and harass them about it

- Good Outcomes:

- Tell your supervisor what's going on. Inform security
- Be calm and don't jump to conclusions.

- **Scenario 4:** *You overhear a volunteer you work with having a conversation with a guest in the café. They seem to be telling the guest about recent restructuring and operational issues your department has been facing and how it has been making them upset. What do you?*
 - **Bad Outcomes:**
 - Do nothing
 - Immediately go up them and call them out in front of the guest.
 - Complain about it to your co-workers.
 - **Good Outcomes:**
 - Tell your supervisor about what you heard. Make sure that this information was meant to be kept confidential.
 - Check in with the volunteer and maybe ask why they are upset and if everything is ok.
- **Scenario 5:** *You are friends with a volunteer you work with outside of Newfields and have noticed some concerning posts on their social media accounts. They have been posting about meetings in your office and complaining about other volunteers and staff. When you ask if they are doing ok, they say everything is fine. What do you do?*
 - **Bad outcomes:**
 - Do nothing
 - Post mean comments on their social media
 - Show only your co-workers
 - **Good outcomes:**
 - Ask if they are ok again and bring up the posts in person
 - Tell your supervisor
 - Tell the Manager of Volunteerism
- **Maintaining Positive Relationships**
 - *Maintaining and deepening positive relationships with volunteers can be hard. As discussed earlier, there are certain boundaries and policies that must be maintained in order for Newfields to function properly as a cultural institution. However, we must recognize that everyone has different operating styles and that can strengthen the organization as well as bringing in new and different perspectives.*
 - *Every volunteer will be different, just as each staff member has a different work style. Think about how your method affects others.*
 - **Recognize** *that your style has both strengths and weaknesses. It is good to have self-awareness about how you work on your own and in a group setting, especially when it comes to coordinating with*

volunteers. What you are used to might not be what they are used to.

- **Adjust.** *As a staff member it is your job to adjust to the volunteer's style, not the other way around. Remember, our volunteers are the highest level of guest and we want it to be as easy as possible for them to bridge the gap between the rest of guests and staff.*
- **Consider** *generational and personality differences when interacting with individual volunteers. Many of our volunteers tend to be around retirement age while our staff is often younger. This means there will be differences in communication, how they are motivated, and how they want to receive recognition.*
- **Generational Styles and Differences**
 - *A major part of this recognition and understanding is knowing which generations both staff and volunteers are a part of and what values and work styles they might hold. We want Newfields to have both a diverse and multi-representative staff and volunteer program and that means understanding that different generations will expect different things. It also means having self-awareness when it comes to which generation you are a part of and identifying personal roadblocks that may impact positive relationships.*
 - **Generational Differences and Values**
 - Ask participants which four generations we see the most in our volunteers and guests and what values each generation might hold.
 - *Baby Boomers (1946 –1964): Professionalism, tailored experiences.*
 - *Gen X (1965 –1980): Loyalty, commitment to certain brands or organizations*
 - *Millennials (1981 – 1996): Experiences over material goods, things that make them feel better about themselves*
 - *Gen Z – tech savvy, value recommendations and multiple perspectives, prefer physical item over an experience*
 - **Activity:** Have participants discuss how they would reward or motivate volunteers from these different generations. Discuss which generation each of them are a part of and write it on the whiteboard. Have them describe their work style and generational differences and discuss the similarities, differences and pros and cons.
- **Communication Is Key**
 - *The most successful way to build a strong relationship with the volunteers you interact with is to be honest, open and communicative with them. This*

helps build trust between everyone and allows for personal growth on both ends.

- *This also means maintaining effective interpersonal communication with volunteers in your departments when situations are emotionally charged, stakes are high and opinions vary. We are all helping run a very complex cultural institution and stressful situations are going to arise. The key is to not only give help to those who need it but to ask and accept help as well.*

- **Conclusion**

- *For Newfields to achieve its mission, each of you must commit to applying what you have learned today in your daily work world. We are holding you accountable for your responsibilities and interactions towards volunteers.*
- *Working with volunteers directly can be challenging but remember to be open and honest with them while also knowing when to draw boundaries.*
- *Remember to listen, consider their opinions and ideas, and adjust your own perspective when needed. We are not just holding our volunteers accountable but our staff as well. What we do here at Newfields could not be possible without the help of our Volunteers.*
- *It is our duty to not only to meet these expectations, but to exceed them. This has always been the foundation of our goals here at Newfields and it should go without saying that it should be applied to volunteer interactions as well. We want all members of our community to feel that they are contributing to something greater than themselves here and that we are better for their contributions.*
- Pictures