



Orienting Extension Volunteers

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Abstract:

Volunteers are vital to Extension, and organizing a strong volunteer base is essential to Extension's mission. The process of orienting volunteers such a fundamental part of successful volunteer programs that it is a process within all volunteer program development models.

This module identifies three types of volunteer orientation: social orientation, position orientation and system orientation. Ensuring that these phases of orientation are done correctly sets volunteers and volunteer programs on a path for success.

Objectives:

- Participants will be able to list and describe the three types of volunteer orientation phases
- Participants will be able to list at least two items that should be covered or presented within each of the three orientation phases

Advance Preparation:

- Review the abstract, background, PowerPoint and handout materials

Materials Needed:

- Laptop and projector
- Copies of handouts

Time Needed: 1 hour

BACKGROUND

Organizing a strong volunteer base is essential to the Extension mission. Volunteers help Extension reach more clientele, ensure the relevancy of programs, deliver Extension education and interpret the value of Extension to stakeholders.

Numerous volunteer program development models exist, such as ISOTURE (Boyce, 1971), L-O-O-P (Penrod, 1991), and GEMS (Culp, Deppe, Castillo, & Wells, 1998). All of these models include volunteer orientation as a key component of building a strong volunteer organization.

Orientation is the process of familiarizing volunteers with Extension and their new duties. Orientation begins with the first contact between a volunteer and the Extension staff. The county Extension agent should focus on teaching about the agency and explaining the ways that volunteers fit into Extension's big picture. The orientation step is fundamental to getting the best and most from Extension volunteers. County agents should never assume that volunteers fully understand the Extension program and the roles they play to support its mission. Instead, agents should take steps to ensure that all volunteers understand the agency, its educational programs and the volunteers' contributions to Extension activities.

INTEREST APPROACH

"Snow White Goes to the Movies"

Instructions: Break up into groups of three. Within your group, assign the following roles:

- A designated reader, who will read the scenario, but other than that they are only allowed to answer "yes" or "no" questions.
- One person must put the characters in order, and does not have a copy of the scenario, and cannot speak.
- The third person can only ask questions.

Snow White and the Seven Dwarfs and three of their friends went to the movies to see "Bambi." Snow White was the first in the ticket line, since the Dwarfs were gentlemen, and the rest fell in behind her. From the clues below, can you determine the order in which they stood in the ticket line?

Sleepy was in front of Smelly. Grumpy was behind Droopy and Bashful. Bashful was in front of Sneezy and Doc. Happy was behind Grumpy, Dopey, and Doc. Doc was in front of Happy, Dopey, and Stumpy. Stumpy was behind Dopey, Sneezy, and Happy. Droopy was in front of Smelly. Dopey was in front of Sleepy, Grumpy, and Droopy. Smelly was in front of Sneezy. Happy was in front of Sleepy and Stumpy. Smelly was behind Droopy, Bashful, and Happy. Grumpy was in front of Smelly. Dopey was behind Bashful.

Answer:

Snow White, Bashful, Doc, Dopey, Grumpy, Happy, Sleepy, Smelly, Sneezy, Stumpy

This is an analogy of what often happens within our volunteer groups. As volunteer administrators, we sometimes give limited and confusing information. Sometimes we even stifel communication channels. We need to orient our volunteers so that they have all the information, skills and tools they need to get a job done efficiently and correctly with the least amount of frustration.

As the leaders of our volunteer groups, we need to give clear, easy to understand information about our group (who we are, what our purpose is, what our goals are, etc...). Volunteers should not be left feeling like they are trying to solve a riddle when it comes to understanding our organization and their role within it.

LESSON

The lesson follows the PowerPoint presentation. Commentary is given in the “notes” section of many of the slides. The following information will also complement the delivery of this module.

As volunteer administrators, county Extension agents need to manage volunteers systematically to enable them to be more effective. A key element of successful volunteer management is a three-step orientation process that familiarizes the volunteers with their duties, the local Extension office and the overall Cooperative Extension system. According to *Best of All: The Quick Reference Guide to Effective Volunteer Involvement* by Linda L. Graff, new volunteers need to complete three types, or phases, of orientation:

- Social orientation
- Position orientation
- System orientation

Social orientation

The goal of social orientation is to help the new volunteers find a social comfort zone as quickly as possible in their new work environment. This type of orientation is like that of a new employee on the first day of work; such orientations can include introductions to the office staff, an explanation of the dress code and directions to the break room.

Social orientation is the simplest of the three phases of orientation, and it takes the least amount of time and preparation. In Extension, a social orientation should include the county Extension agent introducing the volunteer to Extension staff members, such as other county Extension agents and support staff. These introductions help the volunteers feel more at ease working in their new roles and interacting with other staff members.

Volunteers will also become more comfortable in the new environment after they are introduced to the office setting and procedures—such as how to operate the equipment in the workroom, how to access computers and where to store personal belongings.

Position orientation

The goal of position orientation is that the volunteers understand their roles and responsibilities. The agent needs to provide an overview of the volunteer’s position description, outlining specific details and expectations of the job (see handout).

System orientation

The third type of volunteer orientation is a system orientation. Often overlooked, this phase gives information to new volunteers about the organization they are serving and their roles in it.

System orientation should occur soon after a volunteer begins work with the agency. Without a system orientation, volunteers can feel lost and unsure about the organization they work for, which can diminish their motivation and enthusiasm. Although sometimes this orientation is held in a group setting because of a large number of new volunteers, at other times the orientation must take place one-on-one or in small groups.

Tip for Using this with your Group

- Have your volunteers brainstorm ideas with you about how to personalize the three phases of orientation for your specific group. Examples might include conducting group social events that coincide with community activities, or veteran volunteers listing their tips for specific positions within the group along with the written position descriptions.

When orienting volunteers to the system, county Extension agents should explain the structure of Extension. This includes a review of Extension’s mission, the definition of Cooperative Extension and the legislation that created Cooperative Extension (see handout).

Volunteers should understand the program area they serve. Although some volunteers may serve in only one program area, all need to know about all the base program areas within Extension:

- Agriculture, natural resources and environment
- Family and consumer sciences
- 4-H and youth development
- Community development

Although people usually volunteer with particular interests or are recruited for specific purposes, they also need to understand the many other roles and opportunities available to them. As some volunteers continue serving and become more familiar with the agency, they may want to advance or expand their level of involvement. Others are content to maintain their current activities.

Throughout the system orientation process, volunteers should be given an overview of such opportunities as participating in a volunteer association or group, becoming a certified Master Volunteer or serving on a leadership advisory board, program area committee, task force or youth board. This overview can also include an explanation of the purpose of random, or episodic, volunteers and the roles that youths can play as volunteers.

During the system orientation, volunteers should also be given an outline of Extension's policies and procedures as it applies to the volunteers and their positions. Policies that should be covered include program area guidelines, such as 4-H membership guidelines; reporting guidelines, such as reporting of service and education hours for Master Volunteer candidates; youth protection standards training, such as training on types of child abuse and recognizing signs of abuse; and financial resource management training.

Training on policies relevant to the volunteers' work will give them a clear picture of the expectations and guidelines they should operate within.

Extension is committed to helping volunteers develop the competencies they need to fulfill their responsibilities. One facet of that development is an orientation that familiarizes the volunteers with Extension, the agency's staff and other volunteers, and their specific responsibilities.

If volunteers clearly understand Extension and the expectations for their positions, they are more likely to be confident and motivated to fulfill their job responsibilities and represent Extension in the community. They will also be able to serve as advocates for Extension.

APPLICATION

Have participants think about the three types of orientation related to their volunteer program or programs. Ask the audience to write down, on their own sheet of paper, methods that they are currently implementing to onboard new volunteers within each of these three orientation types. Give them time to think about this and write their answers. Then ask the audience to think about things that they are not doing currently, but that would be good to implement, related to the three types of orientation.

REFERENCES

- Boyce, V. Milton. "A Systematic Approach to Leadership Development." Presented to county and area 4-H youth agents conference (PA and MO). Publication: Extension Service, USDA (4-H-5), 1971.
- Culp, I., Ken, Deppe, C. A., Castillo, J. X., & Wells, B. J. (1998). The GEMS Model of Volunteer Administration. *The Journal of Volunteer Administration*, 16(4).
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- Graff, Linda L. (2005). *Best of All: The Quick Reference Guide to Effective Volunteer Involvement*. Linda Graff and Associates Inc.
- Penrod, K. M. (1991). Leadership Involving Volunteers: The L-O-O-P Model. *Journal of extension*, 29(4).

HANDOUTS

Sample Volunteer Orientation Checklist

Use this checklist as a guide in providing an adequate and complete orientation for new volunteers.

Social orientation

- Introduce the new volunteers to other Extension volunteers they will work with.
- Introduce the volunteers to Extension staff, including Extension agents, program assistants and support staff.
- Give them a tour of the Extension office and facilities, showing them the equipment and supplies they can use.

Position orientation

- Define the expectations of the volunteer position, giving an overview of the position description, including the:
 - Benefits of volunteering
 - Purpose of the volunteer position
 - Specific volunteer responsibilities
 - Time commitment for the position
 - Resources and support available to the volunteer
- Explain how volunteers fit in the Extension program and the critical role they play in Extension's success.

System orientation

- Review the structure and design of Extension, including the:
 - Mission of our state's Extension Service
 - Definition of Cooperative Extension
 - Legislation that created and defined Cooperative Extension
- Explain the base program areas of Extension, targeting the program area for which they are volunteering.
- Outline the various volunteer roles and opportunities within Extension.
- Provide an overview of Extension policies and procedures as it relates to their volunteer roles and responsibilities.

Support Material Addressing “Position Orientation”

The goal of position orientation is that the volunteers understand their roles and responsibilities. The agent needs to provide an overview of the volunteer’s position description, outlining specific details and expectations of the job, including:

- **Title:** What is the title of the volunteer position?
- **Advisor:** Who is the volunteer’s super-visor? To whom can the volunteers turn when they have questions or need help?
- **Purpose of the position:** What is the purpose of the volunteer position and/or the committee/task force on which the volunteer will serve? Emphasize the importance of the volunteers, their positions and the benefits they bring to Extension programs.
- **Benefits to the volunteer:** What are the benefits of volunteering? For example, volunteers can:
 - Gain and/or enhance knowledge and skills in a specific subject-matter area
 - Play a significant role in the educational process
 - See a positive change in program participants
 - Learn of the impact the Extension program has in the county
 - Experience personal growth by serving as a volunteer
- **Responsibilities:** What are the specific responsibilities of the volunteer? What are the boundaries of the volunteer position? Volunteers have a responsibility to fulfill the duties outlined in the position description. They should also try to attend trainings and obtain resources that will help them fulfill their responsibilities.

County Extension agents need to stay abreast of the volunteers’ work and accomplishments; likewise, the volunteers should keep Extension faculty informed about the results and impacts of their contributions.

By understanding Extension and helping provide high-quality educational programs, volunteers also can serve as advocates for Extension and better understand how their collective work benefits the entire agency.

- **Qualifications and special skills:** What specific knowledge and skills are needed to fulfill the volunteer role?
 - **Time commitment:** To be successful, how much time is the volunteer expected to devote to the position? Is the volunteer committing to a short-term or a long-term position?
 - **Resources and support available:** What resources and materials are available for the volunteers to use in fulfilling their responsibilities? Who provides support to the volunteers?
- The position orientation should take place early in the volunteer’s time of service. Often, volunteer managers worry about overwhelming volunteers early on with high expectations; however, this orientation is crucial to the volunteers’ effectiveness. They cannot fulfill their duties if they do not know what is expected of them.

Volunteers should also understand how they benefit Extension and how important they are to the agency’s success. Volunteers are valuable assets, helping the agency:

- Reach many more people
- Ensure that its programs are relevant
- Deliver Extension education
- Interpret the value of Extension to others

Support Material Addressing “System Orientation”

System orientation

When orienting volunteers to the system, county Extension agents should explain the structure of Extension. This includes a review of Extension’s mission, the definition of Cooperative Extension and the legislation that created Cooperative Extension:

- **Mission:** (*Your state’s Extension mission here*)

- **Definition of Cooperative Extension:**

Cooperative Extension is an entity of the U.S. Department of Agriculture (USDA) and the Land-Grant University System. It was created to disseminate, explain and promote the practical use of knowledge to improve the quality of life for all citizens in every state.

The Cooperative Extension System employs agents in 3,000 counties across the United States and specialists at each state’s land grant university or at regional sites within the state. The agents draw upon their own expertise, the expertise of specialists and the educational resources of the land grant university to provide information and educational programs that address local citizens’ issues and problems.

Extension agents and specialists are also linked to regional and national networks and the USDA. This integration of teaching, research and public service enables the Cooperative Extension System to respond to critical, emerging issues in communities and offer research-based information to address those issues.

- **Legislative foundation**

Several federal laws provide the foundation for today’s Cooperative Extension System, including two Morrill acts, the Hatch Act, the Smith-Lever Act and two extending legislative actions.

Morrill Act: The Morrill Act of 1862 provided for at least one college in each state to be established in which “the leading object shall be, without excluding other scientific or classical studies, to teach such branches as are related to agriculture and the mechanic arts.”

For each state, the federal government provided income from public lands—30,000 acres or equivalent in scrip for each representative and senator.

Hatch Act: In 1887, the Hatch Act provided grants to establish agricultural research stations at one land grant college in each state. This established agricultural research as a recognized function of the land grant university.

The findings of these research stations were disseminated to general audiences primarily through Farmers’ Institutes. Demonstrations were used as a teaching methodology, and soon “demonstration agents” were being hired with public and private funding.

The nation's first county demonstration agent, W. C. Stallings, was hired in 1906 in Texas. Extension work began to flourish in many states, leading to public support for establishment of an extension system.

Second Morrill Act: In 1890, the Second Morrill Act appropriated more funds for the land grant colleges. To receive the money, a state had to show that race or skin color was not a criterion for admission to the land grant college or to designate a separate land-grant college for black students. The then-segregated Southern States then opened or designated colleges that became known as “the 1890 land grants.”

Smith-Lever Act: The Smith-Lever Act of 1914 provided for cooperation between the USDA and the land grant colleges in conducting agricultural extension work. The law specified that the work “shall consist of instruction and practical demonstration in agriculture and home economics to persons not attending or resident in said colleges in the several communities, and imparting to such persons information on said subjects through field demonstrations, publications and other wise.”

Extending Land-Grant Status: In 1972, a Special Education Amendment extended land grant college status to the U.S. Territories. In 1994, a provision of the Elementary and Secondary Education Reauthorization Act extended this status to 29 Native American colleges throughout the nation.

Extension is a true *cooperative* of federal, state and county partners, each of which provides resources to the agency.

Defining the mandates

The Smith-Lever Act and subsequent legislation specified four mandates for Extension work:

□ **Serve agriculture and the public:** The Smith-Lever Act gave Extension a very broad clientele base—“the people of the United States”—yet also specified that its programs be concerned with “agriculture and home economics and subjects relating thereto.”

□ **Define agriculture broadly:** The term *agriculture* used in the Smith-Lever Act and subsequent legislation included not only the production, processing and marketing of farm and forest products, but also the businesses and industries supplying the resources needed for the production and marketing processes. In a December 8, 1913, report of the House Committee, Representative Lever stated:

“To teach the farmer the best methods of increasing production is exceedingly important, but not more vitally so than is the importance of teaching him the best and most economical methods of distribution. It is not enough to teach him how to grow bigger crops. He must be taught how to get the true value for these bigger crops . . . (The Extension agent) will be expected to give as much thought to the economic side of agriculture—the marketing, standardizing, and grading of farm products—as he gives to the matter of larger acreage yields.”

□ **Enhance human development:** The same report defined the role of the Extension agent as one who *“is to assume leadership in every movement, whatever it may be, the aim of which is better farming, better living, more happiness, more education and better citizenship.”* This broad leadership challenge was also applied to teaching home economics or home management to farm women and to programs aimed at youth. The underlying mandate is to provide educational programs for individuals and families that will enhance human development and maximize a person’s contribution to society. In this way, Cooperative Extension stimulates national growth by helping the individual.

□ **Meet local problems:** Section 8 of the Smith-Lever Act establishes the obligation of Extension to help communities faced with special or unusual hardships. It also acknowledges Extension’s role in working with groups as well as individuals in solving local problems.

This mission is carried out by the four major base program areas in Texas Cooperative Extension:

Base Program Areas and Educational Program Examples

Agriculture, Natural Resources and Environment.

Examples: Livestock, crops, pest management, wildlife, natural resources, water, urban landscapes

Family and Consumer Sciences

Examples: Nutrition, health, safety, housing, food science, human growth and development, family resource management

4-H and Youth Development

Examples: Leadership, community service, character education, agricultural literacy, livestock, food, nutrition, financial planning

Community Resource and Economic Development

Example: Nature tourism, workforce education, community leadership, emergency management

POWERPOINTS

See the attached PowerPoint presentation, “Orienting Extension Volunteers.”

EVALUATION

See the attached evaluation form for this module.