


Tier 1 Training

Course Description: This training will help Newfields Staff better understand the critical mission focused role of volunteerism at Newfields and provide strategies to start and maintain positive relationships with volunteers.

Goal: To become more effective at Volunteer/Employee relationships.

Materials needed: Map of Newfields, attachable names of assets for map, whiteboard, white board markers, blank Volunteer Request forms, Volunteer Request Form example, writing utensils. Have maps and labels together for the Map Activity.

Content Outline: *Italicized sentences are spoken aloud.*

- **Intro and Welcome**
 - *Why are we having this presentation?*
 - *This mandatory staff training is a result of our Volunteer Management Audit and Action Planning Process that took place from August 2017 to June 2018. The biggest opportunity identified by this process was regarding Volunteer/Employee relationships.*
 - *Different aspects of the Volunteerism Department of Newfields were rated by the Audit Team and given an average score out of 4. The lowest scoring area was Volunteer/Employee Relationships, which only scored a 1.6. This is our opportunity to improve and discuss why volunteerism is such a key part of Newfields and what our volunteers do for us.*
 - **Beginning Basic Training for Staff**
 - *Our primary objective is to improve communication to all staff regarding the vision, logistics and robustness of the volunteer program by beginning basic training for staff.*
 - *This will be reiterated throughout the presentation but the key point to keep in mind is that volunteerism is at the core of our mission and vision.*
 - **Constellation of Assets** 
 - *Everything we do here at Newfields is part of our Constellation of Assets. Everyone is working on a small part that creates something bigger than themselves. It is not just the staff who makes Newfields what it is but the volunteers, board members, donors and guests as well.*
- **Ice Breaker: Why Newfields?**
 - Participants are asked to share why they have selected Newfields as a place of employment and what working for a cultural institution like ours means to them.
 - *Why Newfields?*

- *What do you think is appealing about our institution?*
 - *As we work through this training session, keep in mind this question as we will be returning to it later. Why do people come to Newfields? Not just employees but volunteers and guests as well. Why do people want to volunteer here?*
- **Map Activity- “Jigsaw Puzzle”**
 - Place shapes of assets and correct names of each on a blank, magnetic campus map. (Map should be roughly poster board dimensions.)
 - Bigger picture: Shows a visual representation of how everything the staff does for this institution as well as what volunteers do goes back to the mission and vision of Newfields.
 - *In reviewing of the assets that we have on our campus, it’s easy to see why we need volunteers in addition to our staff to help maintain and develop Newfields. We are operating a large campus and it takes a large team to make sure it runs smoothly.*
- **Newfields Mission**
 - *Our Mission: To enrich lives through exceptional experiences with art and nature.*
 - **How Does Volunteerism Contribute to Our Mission?**
 - Group Discussion
 - *Ask participants: Why do you think Volunteerism is so important to our organization?*
 - *Discuss.*
 - **Curating Exceptional Experiences**
 - *All the things we create and do for our guests goes towards our goal of creating exceptional experiences. At the core of all this are our volunteers, they are giving us their time, energy and services. Newfields is a remarkable campus and organization but none of what we do could be possible without our volunteers. So, we are not just curating experiences for our guests but for our volunteers as well. How we interact with them on all levels, reflects our values here at Newfields.*
 - **Reflection**
 - *Start thinking of:*
 - *Who volunteers?*
 - *How should staff be interacting with volunteers?*
- **Strategic Plan Review**
 - *To understand what the expectations are for our staff in interacting with volunteers, we need to review our Strategic Plan. The Strategic Plan is the overall goals, objectives and values for the organization for the next ten years. We want our values in this plan to be reflected in our campus, the experiences we create and the interactions our staff have with guests, volunteers, donors, etc.*

- Values of the Strategic Plan:
 - *Stewardship: We create a vibrant Newfields for current and future generations.*
 - Sustainability, both financially and environmentally
 - Maintenance of campus and collections
 - *Inclusivity: We welcome diverse audiences and ideas.*
 - Providing thoughtful, inclusive and diverse programming
 - Opportunities for individuals and companies through our hiring and procurement practices
 - *Service: We believe the guest is our first priority.*
 - Treating everyone who walks through the doors as an individual.
 - Personalizing our guests' experiences
 - *Excellence: We strive to offer the best of nature and the arts.*
 - Aiming high to meet and exceed expectations of guests, employees, volunteers, and donors.
- **Assessment Activity: Which parts of the strategic plan are of the most importance in regards to Volunteerism?**
 - Write the different values on a whiteboard or something similar and have the participants rank the values 1-4 (highest to lowest importance) with a marker.
 - Discuss why they think some parts are more important than others or why they chose the order that they did. No wrong answers because all aspects are important and differing opinions are ok!
- **Volunteers as Guests, Volunteers vs. Guests**
 - *It is vital that staff recognize that our volunteers are the highest level of guest and are a critical link between the rest of our guests and employees.*
 - *However, how do you draw the line when volunteers are working or when they visit as guests? It is vital to remember that our volunteers are some of the people working most closely to our guests on a regular basis. How we treat them in both regards reflects on how they will view us as an institution.*
 - *When volunteers are working, we do have certain expectations for them. They need to be patient, positive and flexible. Much like our employees, we are holding them to certain standards. We want them to be interacting with guests regularly in a polite, upbeat manner. When they are on the clock, they are volunteers. We expect them to be punctual, dependable and helpful in creating a warm atmosphere for our guests.*
 - *However, volunteers are not being paid and they are dedicating their time and energy freely. This often blurs the line of them being guests versus them being volunteers.*

- *The key is to be appreciative and patient with our volunteers. We want to remind them that we are grateful for their efforts and that we are more than willing to listen to them when they have questions or suggestions.*
 - **Hourglass Visual Aid**
 - Graphic of hourglass that helps explain that our volunteers are the nexus between staff and guests, one of the most crucial parts to the flow of the institution.
 - Reiterates the idea of volunteers being the highest level of guest
 - *Remember: 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 do not just have hold our volunteers to certain expectations but ourselves as well.*
 - **Stakeholder Groups (Group Discussion) - Anyone who has invested interest, time, money, etc. In Newfields.**
 - **What Is A Stakeholder?**
 - Ask participants what they think a stakeholder is.
 - Definition: A person with an interest or concern in something, especially a business.
 - **Who Are Our Stakeholders?** Ask participants who are possible stakeholders
 - Members: guests that have chosen to invest in our organization by buying a type of membership level. They are generally frequent patrons of Newfields.
 - Guests: Not recognized members and perhaps visit campus a little more sporadically.
 - Staff: You!
 - Volunteers: freely dedicating their time and efforts towards our organization
 - Departmental volunteers: Volunteers within a specific environment, i.e.: gardeners in horticulture
 - Episodic volunteers: Project based volunteer involvement, i.e.: Winterlights
 - Interns
 - Docents
 - Garden Guides
 - Donors
 - Board of Governors
 - Board of Trustees
 - Sponsors: attached to seasons
 - Group Volunteers

- Partner organizations
 - Contractors
 - Affiliates
 - *In what ways do these groups overlap?*
- Going back to the original question of Why Newfields?
 - ***Why do you think people volunteer at Newfields?***
 - *Remember why we chose it. Why do our volunteers choose Newfields?*
- **Photograph Trivia**
 - 4 slides with different people. Activity is to identify which stakeholder position(s) they might have. Then reveal who they are.
 - Chris Morehead
 - Intern
 - Charles Venable
 - Jim Johnson
 - Reinforces the idea that you don't know who might be interacting with.
 - *All persons at Newfields should be respected and treated with exceptional care. You never know who you may be interacting with. We want everyone who walks through the doors to have an excellent experience.*
- **Volunteerism Onboarding Process**
 - *Just as staff has an onboarding process, volunteers have one as well and it is important to recognize that it is just as thorough as the employee one. Volunteers do not just become volunteers by signing up or showing up to the campus. We want to make sure that our volunteers are qualified and knowledgeable and know what to expect from Newfields and the Department they will most closely work with.*
 - Ask participants: *What do you think the onboarding process for volunteers looks like?* Discuss and write what they believe the steps of the process are on a whiteboard.
 - 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.*
- **List of Volunteer Positions/Where are our Volunteers ?**
 - *What positions do you think our volunteers fill? Discuss*
 - *To understand the breadth of what our volunteers do for us, here are some of the many positions that our volunteers fill.*
 - Docent
 - Garden Guide
 - Ambassador
 - Interns
 - Office Assistant
 - Greenhouse Assistant
 - Tram Driver
 - Gardener
 - Conservation Lab
 - Museum and Garden Shop
 - Special Events
 - **Volunteer Groups**
 - *Group Volunteers are groups of people from a wide variety of organizations throughout the city and region, including school groups, small businesses and large companies.*
 - *Companies/Organizations Examples*
 - FFA
 - *Bank of America*
 - *Groundwork Indy*
 - *Sales Force*
 - *Lily*

- *And many, many more!*
 - *Group volunteers need no previous experience or specialized skills and typically come in for certain events and projects such as gardening, setting up for Winterlights and working in the Art and Nature Park.*
- **Discussion and Reflection:**
 - *What is your department's role in managing volunteers?*
 - *What is your individual responsibility?*
 - *Where are areas where one might feel secluded or disengaged?*
 - *In what ways could miscommunication be a factor in disengagement?*
 - *How do we ensure all individuals are engaged properly?*
 - **Practical Tips:**
 - *Greet them when they come in for their shift or when you see them.*
 - *If you are working directly with volunteers, check in on them and ask if they need any assistance on their projects.*
 - *If a volunteer asks you a question and you don't know the answer, don't simply say "I don't know". Instead, try to figure out who would be the best person to talk to and point the volunteer in the right direction.*
 - *How can you start to build positive relationships with volunteers?*
 - **Strategies:**
 - *Building a positive relationship with volunteers does take time and effort on everyone's part. Even if you do not directly work with volunteers, it is highly encouraged that you smile and say hello when you pass them by! Thank them for their time and effort if you have a conversation with them! Show them that we appreciate their efforts here.*
 - *While developing a strong relationship is good, remember boundaries can be important too. Be professional and empathetic when interacting with them.*
 - *We have an open communication line and reporting functions to assist with communication for both their manager and the Volunteerism Department. If you or your supervisor do not have an answer to a volunteer's question or have a question yourself, the Volunteerism Department is always happy to help!*
- **Discussion: Scenarios**
 - *Scenario 1: A volunteer comes to you and says: "This is my first day as a volunteer, where do I go?" What is your response?*
 - **Bad Outcome:**
 - *You do nothing*
 - *You vaguely point them in the right direction*

- *Say I don't know and walk away*
 - *Good Outcome:*
 - *Walk with them to the Volunteer Office and introduce them to the Guest Experience and Volunteerism Team.*
 - *If you don't know, look around for another employee or take them to the front desk and ask if someone can help you both.*
- *Scenario 2: You notice a volunteer at the entrance not engaging with guests as they walk by. They look down from time to time and seem uncomfortable. What do you do?*
 - *Bad Outcomes:*
 - *You do nothing*
 - *Snap at them, get angry or frustrated with them*
 - *You don't tell anyone*
 - *Good Outcomes:*
 - *Ask them if they are ok, if they need help with something*
 - *Be polite and helpful as much as possible*
 - *Make sure someone check in with them later*
- *Scenario 3:*
 - *We are having Pretzel Day in the Beer Garden during Volunteer Appreciation Week and we are running out of pretzels. We do not have enough to take care of staff, volunteers, and guests.*
 - *What would you do and why?*
 - *Suggested Answer/Good Outcome:*
 - *Not only is it Volunteer Appreciation Week, but if this scenario were to happen any other time, volunteers and guests should always be prioritized.*
 - *Guests are the #1 priority.*
 - *Tom Hiatt, a member of our Board, walks up and orders a pretzel. What would you do then? What if there were no pretzels for Mr. Hiatt? Keep in mind that he not only a board member but a volunteer as well.*
 - *Good Outcome:*
 - *If there are still some pretzels give him a pretzel*
 - *If not, just explain the situation. Honesty is the best policy instead of scrabbling and trying to cover for something that's not there.*
- *Scenario 4: A volunteer and a guest get into an argument in the middle of PGH. It appears they are going to engage physically. How do you respond? How do you intervene?*
 - *Bad Outcomes*
 - *You do nothing*

- *You join the fight*
 - *You take a side*
 - *Getting angry, causing the scene to become even bigger*
 - **Good Outcomes**
 - *Inform someone to get security*
 - *Try to break up the fight and intervene before physical action is taken*
 - *Approach the volunteer and guest separately*
 - *Inform Manager of Volunteerism Department what has happened*
 - *Make sure everyone is safe*
- *Scenario 5: You have noticed that the relationship between staff members and volunteers in your department has disintegrated over time and it has led to disengagement and miscommunication. What do you do to try to improve the dynamic?*
 - **Bad Outcomes**
 - *You do nothing*
 - *Blame it on the volunteers*
 - *Get angry, snappy, frustrated*
 - **Good Outcomes**
 - *Talk your boss/ supervisor about it*
 - *Start engaging with volunteers, ask about their days, tasks, projects*
 - *Offer to help on anything they might be working on*
- **Activity: Volunteer Work Design**
 - *This activity is to help understand the behind the scenes of constructing new volunteer positions for departments while figuring out the needs and duties of each department.*
 - *Each participant should receive a blank volunteer request form and an example volunteer request. After going over the blank and completed volunteer request form, have them work in pairs to fill out their blank volunteer request form, constructing a new volunteer role for their department.*
 - *Discuss what they came up with and what challenges they had.*
- **Volunteer Risk Management Policies**
 - *While most legal, insurance and risk management strategies are handled on a case-by-case basis, it is important to understand what to expect out of volunteers in regards to security and general policies.*
 - *We expect volunteers to be punctual and professional when they are on duty. Volunteers must log hours on our volunteer management system, Volgistics. This helps us keep accurate records of their contribution, however more importantly, it allows us to know which volunteers are*

where on campus when, in case there is ever an emergency. They must sign in each time when they come in for their shift and sign out as they leave.

- *As with our staff, volunteers are given a badge to wear with their picture. While they are working, they must have their badge in a visible location.*
- *Newfields reserves the right to terminate a volunteer's connection with the organization at any time. If you believe that a volunteer is not following protocol or not upholding Newfields' values, please let the Manager of Volunteerism know so that corrective action may be taken. Depending on the situation, an informal warning may be given first before a formal verbal or written warning is given.*
- *Questions?*

- **Volunteerism Results**

- *Before we wrap up, we want to show you how hard our volunteers and Volunteerism department has been working. The past few years have shown a marked growth in the number of hours donated by volunteers.*
- *For Spring Blooms in 2017, we had 675 shifts filled with 1,901 hours contributed and a 70% fill rate. In 2018, that increased to 732 shifts filled with 2,196 hours contributed and an 83% fill rate. For our first year of Winterlights in 2017, we had 824 shifts filled with 4,120 hours donated and a 98% fill rate. The next year it increased to 1,088 shifts with 5,440 hours donated and a 96% fill rate.*
 - *Fill rate is how many volunteer positions we have currently filled. We do not want a 100% fill rate since we want to have some available positions and flexibility in scheduling. It varies by institution, but our fill rate goal is in the 80-90% range.*
- **2019 Year In Review - Add to slide notes**
 - *Not only have we seen a marked increase in our volunteer involvement in our seasonal events but the total year round number of hours significantly increased as well. In 2019 we had 579 regular volunteers (those who volunteer at least once per month). The hard work of our volunteers paid off and we had a total of 62,020 hours donated, which is a 350% increase from Year 1 of Newfields. In addition to this, the average number of hours donated per volunteer was 73.36 and we had a fill rate of 85%.*
- *This shows us that Newfields is a place volunteers want to come back to. We hope that these numbers continue to rise in the future as our campus and programs grow and develop since most of what we do here is not possible without the help of our volunteers.*

- **Conclusion**

- *For Newfields to achieve its mission, each of you must commit to applying what you have learned today in your daily work world. This means going*

above and beyond then just saying hello and smiling. It means being approachable, helpful and dependable.

- *Per your position as a Newfields employee, you'll be held accountable to these responsibilities.*
- *It is all our duty to implement these values within our work here at Newfields. Volunteerism is at the core of mission and vision here and we want all members of our community to understand that they are making Newfields a brighter and better place because of their work and efforts.*
- Pictures