

A smiling man with glasses and a striped shirt is the central focus of the image. He is in a workshop or training environment, with other people blurred in the background. The overall tone is positive and professional.

# Transformative Volunteering Online

Volunteer Leader Training Aid



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# Virtual Volunteering

Basics and Considerations



# Virtual Volunteering Basics

There are **three key elements** of successful virtual volunteering programs. Consider key facets to each as you build out remote-inclusive volunteering opportunities.



## METHOD

- Transformative methodology
- Volunteer leader network
- Communications materials
- Volunteer leader training
- CSR Team support



## OPPORTUNITIES

- Existing partnerships
- Net-new opportunities
- Cause focus or employee choice



## PLATFORM

- Opportunity aggregators
- Opportunity facilitators
- High touch support vs. broad-based mobilization
- Organization-led vs. employee-led

# A Closer Look At Virtual Volunteering

When thinking about virtual volunteering for your organization, be aware of the associated challenges and opportunities. Consider how each manifests in your organization, how challenges might need to be mitigated and how opportunities can be taken advantage of.

## CHALLENGES

- Dependent on digital infrastructure and connectivity of the business, nonprofit partner and beneficiaries (in some cases)
- Subject to firewall limitations and issues which can prevent access for the employee and/or nonprofit
- Adds layer of complexity to facilitation of events, especially when it comes to making the event transformative
- Encouraging participation from new volunteers can be difficult when relying solely on digital methods of engagement

## OPPORTUNITIES

- More flexible and convenient for employees since they can volunteer from home or in their immediate communities
- Inclusive of employees who were previously remote and struggled to participate in in-person volunteering events
- Cross-company volunteering becomes possible, breaking down location-based silos
- New skills, related to technology and remote facilitation, can be developed by employees

# EXERCISE: Platform and Technology

This exercise helps you document any existing parameters or constraints when it comes to platforms and technology. For example, perhaps the organization already has a platform for virtual volunteering and is not looking to invest in another.

## INSTRUCTIONS



1. Take a quick inventory of the workplace volunteering platforms at your organization (e.g. Benevity), if applicable. This includes any platforms that are active APIs to a central volunteering platform (e.g. VolunteerMatch).



2. Document if any platforms specifically enable virtual volunteering, to your knowledge, and whether the intention is to use said platforms for virtual volunteering in any capacity (i.e. from volunteering via the platform to tracking volunteer activity).

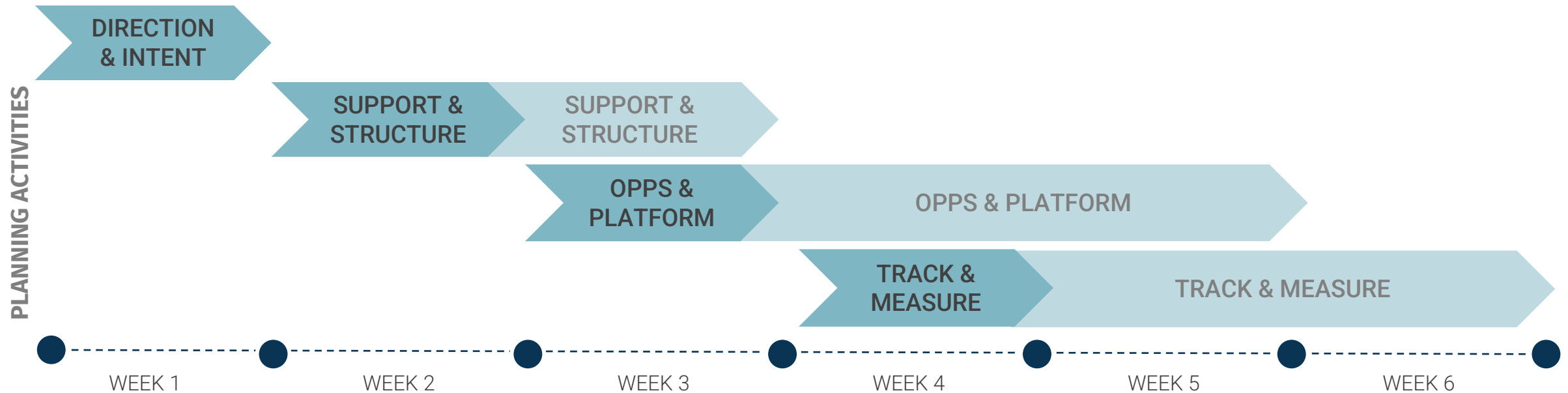


3. Take a quick inventory of any actively used technology platforms that have the potential to support virtual volunteering in any capacity. Include company web pages (e.g. intranet), collaboration tools (e.g. live chat, Slack, etc.) and web conference tools (e.g. Zoom, Teams, WebEx, etc.).

# Planning Timeline Considerations

After considering platform and technology resources and constraints, outline the timeline to plan a virtual volunteering project. First, consider the minimum time required to plan:

## SAMPLE PLANNING TIMELINE



The timeline above may vary based on multiple factors. For example, making certain decisions may involve multiple stakeholders which, in turn, may delay taking action to implement certain aspects of virtual volunteering. Consider key milestones and work backwards, and always consider time constraints when making decisions.

# Tips for Preparing for Prep Calls



**Remind participants of the call.** Send an email or set up an automatic reminder before each meeting.



**Keep your agenda manageable.** Keep your ideas crisp, clear and palatable, and summarize.



**From the participant's perspective, ask "what's in it for me?".** Plan to share only information that brings immediate value by being shared verbally.



**Ask others to lead and share.** Prep a few team members ahead of time to speak up and share information or stories. Be sure they understand why they are sharing.

# Tips for Running Prep Calls and Events

- 1 **Turn on your video** and encourage your team to do the same. A face of another person triggers empathy.
- 2 Take a minute to **break the mute barrier**. Ask each person to quickly say their name and where they're calling in from.
- 3 **Assign and align**. Set aside time at the start of the meeting to review and designate tasks. Clarity on ownership in remote environments is important.
- 4 **Build a sense of community**. Encourage participants to use the chat to connect with one another and check in with people throughout the call by asking for questions or insights.
- 5 Talk to people and **use their names**. People will pay attention if they expect to hear their name.
- 6 **Maintain eye contact**. When using video, look straight at the camera instead of the screen. Keep your expression engaged and interested when you're not speaking.
- 7 **Keep your energy up**. Lift the virtual energy of the call with a genuinely positive and upbeat tone.
- 8 **Allow awkward silence**. Typically, people wait an inordinate amount of time to see if someone else wants to speak up first. Pause to allow uber-polite team members to speak up.
- 9 **Summarize key points**. People who attended the meeting should be able to rattle off three salient takeaways without much work.

# Transformative Volunteering

Basics and Considerations



# Transformative Volunteering Basics

Realized Worth moves volunteering beyond transactional interaction to transformative experiences. Transformative Volunteering is rooted in [Transformative Learning Theory](#) and differs from transactional volunteering in the following ways:

## TRANSACTIONAL VOLUNTEERING

- **Asset-centered approach** (emphasis on existing and potential resources) to investment
- Volunteering is a resource to **do something good** and “make a difference”
- Focus is on the **task**
- Primary impact is measured in **social or environmental terms**

## TRANSFORMATIVE VOLUNTEERING

- **Human-centered** approach (emphasis on an individual’s personal development) to investment.
- Volunteering is a means to **personal growth** through prosocial behavior
- Focus is the **volunteer**
- Primary impact is measured in **changes to the individuals** psychological, convictional or behavioral perspectives

**Transformative Volunteering** invites impact that goes beyond the moment. It invites the volunteer themselves to look inward and consider, “**What part do I have in contributing to this issue? What needs to change in me to be part of the solution?**” As in the “real world,” Transformative Volunteering can be used in virtual environment to enrich the experience of employee volunteers.



# Transformative Volunteering: 3 Keystone Behaviors

The **Keystone Behaviors** are three simple behaviors used to frame a volunteer experience in order create space for transformation. The 3 Keystone Behaviors are:



## CONDUCTING THE BRIEF

**Before the event**, helping participants consider the real meaning behind the work they are about to complete and shift the focus from task efficiency to **who the task is for and how it benefits them**.



## GUIDING VOLUNTEER EXPERIENCES

**During the event**, recognizing where participants are in their volunteer journey in order to meet them at their **highest level of contribution** and create an environment where they have their needs met, have a great experience, and can keep developing as a volunteer.



## CONDUCTING THE DEBRIEF

**After the event**, inviting participants to **critically reflect** on their experience and helping them bring meaning to the event beyond the task accomplished or team-building.

# Taking the Keystone Behaviors Online

Conducting the **Keystone Behaviors online** requires a few nuanced considerations:



## CONDUCTING THE BRIEF

You may find that some of the priming that happens in the Brief also **expands organically into communications on multiple platforms**. Volunteers and volunteer leaders may begin talking about the true purpose of a volunteer engagement ahead of the event on relevant Slack channels, for example.



## GUIDING VOLUNTEER EXPERIENCES

Often, there is little to no opportunity to guide volunteers during a group virtual event. When volunteers complete a task individually, you can **balance** the lower-touch, more **transactional task time** with **expanded Brief and Debrief** conversations.



## CONDUCTING THE DEBRIEF

Volunteers may continue to "Debrief," discussing and reflecting on their experience in subsequent conversations and spaces online. This is an excellent opportunity to **continue dialogue** that facilitates **mindset shift**.

# The Brief: Basics

The Brief helps participants consider the real meaning behind the work they are about to complete and shifts the focus from task efficiency to who the task is for and how it benefits them. The Brief is often delivered in the form of a story and contains **three critical elements**:

1

## **CHALLENGE ASSUMPTIONS**

Present a disorienting dilemma about the issue or cause you are volunteering for through storytelling.

2

## **COMMUNICATE TASK SIGNIFICANCE**

Explain who the task is for, but more importantly, why it matters.

3

## **CREATE PROXIMITY TO THE BENEFICIARY**

Talk about a real person and their real story. Invite volunteers to imagine what it would be like to live as this person.

# The Brief: Basics

As in person, the Brief begins with acknowledgement that volunteers *chose* to be there. Set the stage with gratitude. Then tell the **story**. Who is the nonprofit, and who are the people you will serve? **Stories document change, compel us to act, and drive us toward empathy. Build your story through the Brief.**

When constructing a Brief, volunteer leaders are encouraged to ask themselves three questions:

## WHO ARE WE SERVING, AND CAN I IDENTIFY WITH THEM?

“What would it be like for me to be in this situation, affected by these issues, or part of this community?”

## WHAT AM I LIKELY TO SHARE WITH OTHERS?

“What about this organization or cause catches my attention in a way I am likely to talk about later? An achievement? The size of the issue?”

## WHY ARE WE DOING THIS TOGETHER?

“What connects this activity with our values or mission? How does this fit us as a company?”



Introductions in the chat enable all volunteers to use the same time and space vs. in-person introductions that can be dominated by a few.



# Guiding Volunteers: Basics

To *guide volunteers* volunteer leaders must understand the **Journey of the Volunteer** and constantly observe, assess and decide what volunteers need as they progress through their volunteer journey.

Often, virtual environments allow for very little interaction or guiding during the volunteer activity itself. Volunteer leaders will use this information, however, when engaging volunteers from recruitment to re-engagement.

## STAGE 1: TOURIST “CASUAL CURIOSITY”

- New or infrequent volunteer
- Competing priorities
- Interested in straightforward and immediately rewarding tasks
- May participate again if they have a great experience

## STAGE 2: TRAVELER “MEANINGFUL DISCOVERY”

- Ready to own experiences for themselves
- Ready to take on leadership responsibility and/or increased commitment
- May express tension, boredom, or eagerness

## STAGE 3: GUIDE “INTENTIONAL ALIGNMENT”

- Trusted to run activities when needed
- Naturally able to help others find their way at events
- Understand that while they help, they also benefit from volunteering

# The Debrief: Basics

The Debrief is often the most neglected of the Keystone Behaviors but it is **non-negotiable** in creating space for a Transformative Volunteering experience. The Debrief is essential because it invites participants to **critically reflect** on their experience. Without the Debrief, participants are often left to make sense of their experience on their own, and lacking key insights, this can lead to discouraging or inaccurate conclusions.

## TWO QUESTIONS TO ASK DURING THE DEBRIEF:

1

WHAT DID YOU  
**EXPERIENCE?**

2

WAS IT WHAT YOU  
**EXPECTED?**



**Not everyone has to answer.** The point is just to invite this type of reflection, so after a few people share, volunteer leaders can thank everyone for coming, ask them to consider the questions after they log off from the event, and send them on their way.

# The Debrief: Basics

When conducting the Debrief online it is more important to recap the **purpose of the activity** and review the work done because volunteers are not working in the same physical space.

Remind volunteers why the work they did matters. Create space for volunteers to reflect on their experience.

## USE THE **CHAT** WHEN CONDUCTING THE DEBRIEF ONLINE

- 1 Reflections can be simultaneous.** Invite a **few minutes of silence** while volunteers type responses in the chat simultaneously. After responses come in, consider inviting a few people to speak to and expand on what they wrote.
- 2 Reflections can be memorialized.** After the event concludes, use the written reflections from the chat log in **post-event communications**. For example, synthesize some key takeaways and share via email to continue the dialogue – and continue to stimulate mindset shift by revisiting newer ways of thinking.

# Strategies to Continue the Debrief

Create virtual space for safe and intentional critical reflection



Hold **casual “roundtable”** video calls

For **multi-event projects**, host a virtual "Lunch & Learn" after the events are complete

Have **volunteers** write short **blogs** or use social media to send out micro-blogs about their experiences

**Invite employees to share** quotes or short blurbs about their experiences in online company communities

# Discussion Questions

Create virtual space for safe and intentional critical reflection



Did you **learn** anything about **yourself**?

What kinds of things did you discover about the **community** you were working in?

What do you think your **personal contributions** were to the volunteering experience?

Have any of your **values, opinions, beliefs** been influenced by volunteering?

What is your **biggest takeaway**?

How have you been **challenged**?

What **changes** are you considering for **yourself**?

# ABOUT REALIZED WORTH

Since 2008, Realized Worth has offered strategic consulting services to some of the most notable companies in the world. We help companies successfully create or evolve their employee social impact strategy through a comprehensive design, transition and implementation process that results in a robust and scalable employee program. It's our mission to help companies curate Transformative Experiences to drive company-wide social movements. We bring meaning to action through our Transformative Volunteering approach, which teaches employees how to practice behaviors that create engaging, effective, and impactful volunteer projects for their peers.

With a wide range of over 100 clients including Abbott Labs, Amazon, Apple, Comcast, Deloitte, Microsoft, Netflix, and others, Realized Worth's specialized expertise is uniquely suited for the corporation seeking meaningful impact through its employee social impact programs.

The co-founders of Realized Worth, Chris Jarvis and Angela Parker, are based in Baltimore, Maryland. The extended team is based throughout the US and Canada. Realized Worth Canada is based in Halifax, Nova Scotia.

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