



Managing Virtual Volunteers

GUIDE TO MANAGING VIRTUAL VOLUNTEERS

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HOW TO SCREEN VIRTUAL VOLUNTEERS

Volunteer agencies should appoint a staff person as the main contact for virtual volunteers. These individuals should:

- Pattern virtual volunteering interaction after existing face-to-face volunteering experiences
- Adapt existing offline systems, policies, and procedures to cyberspace
- Establish efficient tracking of volunteer activities and supervision of interactions
- Create safety guidelines for all virtual volunteering programs (create policies, explore issues of privacy and confidentiality)
- Secure a signed parental permission for volunteers under 18 years of age. Maintain continuous communication with parents or guardians via a separate e-mail on the nature of activity and any live interaction

DEVELOPING STRICT, TWO-WAY SAFETY AND SECURITY GUIDELINES

An agency's virtual volunteer program must have strict, built-in safeguards that assure all participants' safety, security, privacy, and protection.

The scope should be similar to a live activity, but more failsafe and proactive. A virtual, online environment makes it easier to misrepresent one's identity or intent, and remain undetected or anonymous.

Your security and safety guidelines should be designed to do the following:

- Protect participants' privacy and personal information (participants can be staff, volunteers, clients, parents, etc.)



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- Screen out people who would abuse or exploit participants or the computer systems they use
- Prevent opportunities for abuse or exploitation of participants
- Protect youth from inappropriate online materials or information (Be sure to deploy parental controls on in-office computers that volunteers, especially young people, have access to)
- Protect your networked computer systems and vital data, plans, financials from inappropriate access or from potential hackers or thieves
- Safeguard and secure data collected on volunteers, and limit access to trusted, pre-authorized staff or volunteers
- Encourage online interchanges without disclosing real email address.
- Discourage volunteers from disclosing their home address or phone number to others.

SCREENING VIRTUAL VOLUNTEERS

If the volunteers are going to be working directly with children, it is strongly suggested that you conduct criminal background checks and face-to-face interviews with people who are going to volunteer with children in a virtual environment. Likewise you need to remind and question kids about appropriate and inappropriate interactions, and what to do 'if'.

ESTABLISHING A CODE OF CONDUCT

Just as you do with offline volunteers and staff, you need to establish and communicate a code of conduct and other guidelines for virtual volunteers. Be sure to make clear the policy, procedures, and appropriate organization contacts so that volunteers can keep you informed of any real or perceived improprieties.

We have posted some questions that you may want to think about when creating your code of conduct.

Confidentiality

Does your organization have a policy about forwarding e-mail messages? Or about volunteers talking to each other, to staff, or to people outside the organization regarding their activities at your organization?

Your virtual volunteer program should have strict guidelines so that a well-meaning volunteer does not carelessly disclose information, share files or sensitive data with others. You may want to consider having (all) volunteers sign a non-disclosure form so they realize the sensitivity of your information.



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Screening/Background Checks

What types of screening or checks are conducted initially? What other checks may be performed later? How will these checks affect a volunteer's role? What kinds of questions must be answered as part of the screening process, of both potential participants and their references? Be sure to check with local authorities on existing databases and guidelines that can supplement your own screening mechanisms.

Representing the Organization

Can volunteers send e-mails or post to newsgroups on behalf of your organization? Should a staff person review anything volunteers send out or receive, before or after it is posted to the group? Can exchanges be self-policing, or is more careful monitoring or moderating needed? Should there be legal guidelines or review on certain topics?

Inappropriate Communications, Activities, and E-Mails

Be sure to make all policy, procedures, and appropriate organization contacts readily available.

What should a volunteer do if someone from outside your organization contacts him or her in an inappropriate way? What should this person do if they encounter pornographic material while doing virtual research for your organization? What should the volunteer do if they encounter something they think is illegal in a virtual exchange under the auspices of your project? What should a volunteer do if they observe another volunteer, staff person, or client engaging in illegal or inappropriate activity in a virtual or live setting?

Youth-Adult Interaction Policies

- ✓ All virtual interactions between youth and adults should be archived to protect all parties.
- ✓ Youth and adults should receive detailed guidelines before interactions take place about what is not acceptable in virtual exchanges. Regular reminders should be sent out about these guidelines.
- ✓ Parents should know their children are participating in this virtual program. Provide parents with a written overview of the program, its benefits, as well as your systems and safeguards for safety and security in virtual and live environments.
- ✓ Some organizations require written parental approval or acknowledgement that they have reviewed the information. As a safeguard, correspond with parents via a separate email address, and also send a permission form to



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- them at home which requires them to return a signed parental consent form via mail or fax.
- ✓ Have a system for youth to report inappropriate communications. Remind them of this system and key staff contact information.
 - ✓ Detail and communicate to virtual volunteers how they should handle inappropriate communications and crisis situations, such as talk of suicide or criminal activity by the youth they are mentoring or tutoring virtually.
 - ✓ If volunteers have been interviewed face-to-face by the agency and undergone a criminal and personal background check, and if your agency allows one-to-one unsupervised interactions with young people in face-to-face situations (such as the system used by Big Brothers/Big Sisters), your agency should be safe to allow these virtual volunteers to work one-to-one with young people. This one-on-one interaction allows volunteers direct access to each child's email address without filtering or approval system before emails are forwarded to children. For many programs, however, this is not an appropriate option.
 - ✓ Be sure to check with your legal counsel, and build in as many safeguards as deemed appropriate. Continue to monitor activities and kids. Regularly remind kids about appropriate and inappropriate interactions, and help them prepare to take appropriate action if inappropriate situations should arise.



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PROTECTING IDENTITIES

Since virtual volunteer group interactions typically occur online, build in safeguards that allow participants to remain anonymous when interacting with each other. It may be appropriate for your agency to utilize one of the methods below to safeguard identities and create a safe environment, especially between adults and children. Do not overlook the possibility that interpersonal dynamics could easily result in unwanted exchanges or 'advances' between adults, online and offline.

RECOMMENDATIONS:

1. Require all volunteers (especially adult and youth interactions) to each have a special e-mail address to be used exclusively for their volunteer work, one that does not reveal personal information, such as last names or employer. This e-mail address should not be registered in any way that can be traced to a real-world identity, such as the "Member Profile" on AOL, or associated with a personal or employer Web page. If this becomes a common practice at your agency, make sure someone has an up-to-date record of what e-mail address goes with each volunteer or client.
2. Set up a group e-mail mailing list that allows participants to post under a screen name or alias, and hides actual e-mail addresses. As always, make sure someone at your agency has an up-to-date record of what screen name or alias goes with each volunteer or youth.
3. Require all volunteer and youth interactions to take place via a private virtual chat room, where participants use screen names or aliases to communicate with each other (these screen names should not be first and last names). Again, make sure someone at your agency has a record of what screen name or alias goes with each volunteer or client.
4. Use a community-based email exchange like www.Yahogroups.com to create a group exchange for volunteers. The leader must approve entry into the group and postings to the group website. This free service could be a big time-saver with the entire requisite monitoring and archiving of email exchanges. This makes it easier for staff or volunteer leader to monitor activity and public email exchanges, provides a buffer, and the requisite archives should an incident arise.
5. Advise volunteers and clients to remain anonymous by not mentioning personal information in their online interactions that could allow someone to trace their identity, such as their real names, e-mail addresses, websites, postal addresses, schools they attend, or companies they work for, and so on. This ensures that volunteers cannot contact each other outside of virtual discussion system operated and observed by the agency, and that no inappropriate behavior can take place in one-to-one communications.



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SUPPORTING VIRTUAL VOLUNTEERS

The following are basic guidelines that can help organizations using 1-800-Volunteer.org to maintain good relationships with virtual volunteers and support them in completing assignments.

CLARIFY EXPECTATIONS AND DEADLINES

Once you have chosen a virtual volunteer to work with, review the assignment with them to make sure expectations and deadlines are clear. E-mail the selected assignment to the volunteer. Include clear details on expectations, and any supplemental information outlining specific objectives and goals, such as:

- In what format should the volunteer submit completed work (Text only? A spread sheet program? An HTML file?)
- Will the volunteer need text from an organization's existing materials (old funding proposals, annual reports, etc.)?
- What are the first steps that the volunteer should take in pursuit of completing this assignment?

Make certain that the volunteer understands what is expected for each section of the assignment, and establish real objectives and deadlines. Ensure that the volunteer understands how each assignment supports a particular organizational objective or goal.

GIVE EVERY ASSIGNMENT AN END DATE

Especially with a new volunteer or new program, it may be wise to assign an end date that is well ahead of your absolute end date. An extra two to four weeks will give you wiggle room for unforeseen hurdles, issues, and contingencies. This will also allow ample time for staff edits, inputs, and approvals, if necessary.

A clear end date gives both the organization and the volunteer an opportunity to look at the progress made, make adjustments, and acknowledge accomplishments.

ASK THE VOLUNTEER TO REPORT IN WEEKLY

Ask the volunteer to send the appropriate staff liaison a simple e-mail every week to report tracking stats, using a consistent format. E-mails should include the following:

- The number of hours worked (even if the total is zero)
- Percentage of the assignment yet to be completed
- Valuable tools and resources
- Problems or obstacles
- Suggestions for improvement



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- Tasks and goals for the next week (or next month)

A simple e-mail will do. Ideally, the volunteer should use a consistent form or format that will make it easy to track and transpose information into your master weekly project tracking system, which will save time in the long run.

Save these e-mails! They will help when it comes time to recap project progress, create plans for the next fiscal year. These weekly e-mails will ensure that a volunteer is progressing, and will alert staff to any problems in the assignment early on.

Reply to these progress reports as soon as possible to acknowledge receipt. (A simple e-mail "thanks" is great!). If the volunteer doesn't report in, be proactive. Write him or her to check in on progress.

Ongoing communication will keep volunteers and staff engaged and informed.

Always share advice or suggestions or resource tips, do so in a positive way. Keep volunteers energized, engaged, and interested by teaching, inspiring, and enabling them to learn new skills. Be sure to recognize their contributions and accomplishments-big and small.



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Recognizing Virtual Volunteers

Upon completion of an assignment, IMMEDIATELY sign into the opportunity to assign service hours (which will automatically populate their record of service), comment on the volunteer's performance and to generate the automatic email thank you. .

Keep your virtual volunteers engaged with email updates about your organization, events your organization is hosting, honors received, newspaper articles that mention your organization, and so forth. Upload photos and comments from outstanding volunteers into your customized 1-800-Volunteer.org page.

RESOURCES and VIRTUAL HELP

- Service Leader (Virtual Volunteering Guide Book):
<http://www.serviceleader.org/new/documents/vvguide.pdf>
- Association for Volunteer Administrators: www.avaintl.org
- CompuMentor: www.compumentor.org (nonprofit technology portal)
- Cyber Speaker: <http://www.cyberspeaker.com/sevensteps.html>
- Energize Inc.: www.energizeinc.com (general VPM resource)
- Net Aid: www.1-800-Volunteer.org/ov/index_html
- TechSoup: www.techsoup.org (nonprofit technology portal)
- Volunteer Today: www.volunteertoday.com (VPM monthly e-gazette)
- Netiquette: www.dtcc.edu/cs/rfc1855.html

EXAMPLES OF VIRTUAL VOLUNTEER PROGRAMS

- Children's Museum of Washington www.discoverycreek.org
- International Telementor Program www.telementor.org
- National Air and Space Museum www.nasm.si.edu
- National Building Museum www.nbm.org
- National Museum of Women in the Arts www.nmwa.org
- Smithsonian www.si.edu
- Teletutoring Project www.monmouth.com/~vnet/v4a.html