Case Study:

Remote Advisors



Shifting In-Person Advisor Services Online During COVID-19

Many individuals—often those who would most benefit from volunteer experience—struggle to access meaningful roles. Volunteer Toronto's 40-year Volunteer Advisor program has helped guide thousands of volunteer seekers every year through in person, phone appointments, and email support. Helping volunteers find opportunities that best suit their needs ultimately results in enhanced retention in the field.

Before the COVID-19 pandemic, ten dedicated Volunteer Advisors provided advising services during three hour in-office shifts from Monday to Friday. As volunteerism experts, they shared information with the public about the non-profit sector, navigating VolunteerToronto.ca, volunteer postings, and application processes. In response to the pandemic, it took only one week with all hands on deck to shift the team to provide remote services conducted from each volunteer's home.

Since mid-March, 7 Volunteer Advisors have been redeployed remotely to help 1,250 volunteer seekers

In the following months, Remote Volunteer Advisor appointments would see a dramatic increase in service demand and consistent bookings two-weeks in advance. Samah AbdelAziz, Volunteer Advisor Team Leader, is one of the key players in continuing to manage increased demand. According to Samah, one of the most important aspects in shifting the volunteer program and ensuring it's ongoing success is consistent communication.



"It was really important to pre-plan resources and scripts to have available for volunteers in a shareable file storage platform. This helped the Advisor team provide accurate and timely information to volunteer-seekers about how to stay safe during COVID. With so many changes, having a way to capture and communicate these updates was crucial."

— Samah AbdelAziz,
Volunteer Advisor Team Leader

Action Areas for Adapting Programs

- Take leadership at your organization and advocate for the role of volunteers in meeting your mission
- Identify relevant health and safety procedures for your program areas as indicated by Toronto Public Health
- Seek out innovative practices in your sector and access volunteer management resources at: info.volunteertoronto.ca/LearningLibrary
- Connect with volunteers from your programs to discuss new policies, procedures, and comfort with technologies
- Outline a new volunteer management cycle that mitigates health and safety risks for staff, volunteers, and clients
- Get buy-in by clearly communicating your new program with staff, volunteers, and clients

The Volunteer Management Cycle

Both Samah and Volunteer Toronto staff were hyper aware that to keep Volunteers Advisors—many of whom are retirees—engaged through a program transition, we'd need to re-evaluate each stage of the Volunteer Cycle:

Recruitment and Screening

As weekly shift-based volunteers, it wasn't hard to reach out to the existing core of Volunteers Advisors to propose remote redeployment on the same schedule. Volunteers were given the choice to continue remotely or return at a later date. It was also confirmed that those interested in participating had access and were comfortable using the necessary technology of a computer and phone. Many volunteers were excited to continue to serve the community.

Volunteer Orientation and Training

Within just one week, staff quickly implemented and tested a new online phone app, or soft phone, with each eager Remote Volunteer Advisor. To ensure the consistent delivery of new information, new scripts were also created to use as conversation guidelines, including additional public health information. All information was reviewed one-on-one, via phone or Zoom, and up-to-date details continue to be sent through email as they are available. Samah adds:

"The greatest impact has been in valuing our volunteer's input. Weekly check-ins have been key in staying connected and supporting each other during the transition to a remote program – and beyond."



Ongoing Support, Retention, and Recognition

In order to track intake of volunteer seekers and outgoing Volunteer Advisor calls, an Excel Google doc was created so volunteers could access and update the log in real-time. Samah and her volunteer team now also connect on a weekly basis via Zoom to discuss trends in volunteer interest and to share ongoing volunteer recognition on behalf of staff and the public.

Essential Technologies

Several softwares and technologies enable Volunteer Toronto's Remote Volunteer Advisor program to operate:

- **GoToConnect Mobile** soft phones ($450/month)
- **Google Docs** (free)
- **Bookeo** online appointment system ($40/month)
- Password-protected **Zoom** technology (free account)

Quick Reference: Lessons Learned

- Online phone solutions, or soft phones, are key to protecting the volunteer's privacy when contacting the public on behalf of Volunteer Toronto.
- Setting up regular 'shifts' is key to keeping the team focused and on track.
- Scheduling regular weekly check-ins ensures issues are addressed in a timely manner.
- Start recruiting extra volunteers now to meet increased demand and reduce potential burnout.
- The service may be 'virtual', but the volunteers are not. Remember to value their time and the difficulties of giving back from home.

Ongoing Volunteer Advisor Work

Samah is currently on-boarding a new wave of Remote Volunteer Advisors—many of whom are past volunteers—to prepare for burnout and/or summer flexibility. With over 100 sessions booked weekly, Samah would like to continue to meet service demand now and well into the future through remote advising support. Volunteer Advisors that were not redeployed will be re-engaged for in person services or alternative roles by Winter 2020.

Alongside other volunteer centres in the GTA, Volunteer Toronto is preparing to provide enhanced screening services for non-profits providing essential services. The Volunteer Advisors, now redeployed remotely, are the perfect launchpad for this work.

Thank you Samah and the Remote Volunteer Advisor Team for stepping up!

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