Orientation: An Emphasis on the Oral Tradition

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The event volunteer program leaders commonly call orientation can be a key factor in establishing the sense of belonging—the feeling of family—or it can be a dry, boring few hours that leave the participant with unanswered questions, irrelevant information, or dysfunctional confusion from over-load of information. This article will look at the components of volunteer orientation and suggest ways of presenting a program that incorporates printed and visual material and re-introduces oral history as an information-sharing tool.

In recent years the oral traditions which had served us for so long have been neglected, if not lost, under a deluge of paper. We will examine the role of storyteller and suggest specific areas in the program that lend themselves to this tradition, and the information better left to print or other visual aids.

The basic goals of an orientation are:

1) to establish organizational values;
2) to share current information about the organization; and
3) to motivate commitment.

When planning an orientation it is important to recognize that some people are oriented visually and others are aurally stimulated. There are left-brained persons who respond to facts and figures, and right-brained creative, imaginative people. An orientation that presents fact after fact will fall short of its goal to make all the attendees feel they have a place in their new surroundings. Too much talk will fall on deaf ears. The key is balance.

QUESTIONS TO CONSIDER

Some questions to be considered in planning an orientation are as follows.

What kind of volunteer is receiving the orientation, a service volunteer or a policy (board) volunteer? The general information they both need is the same, but each group needs different specific information relative to their roles.

How often does your organization present an orientation? The more frequently an organization presents an orientation the shorter it can be, but for the purposes of this article we are considering a yearly event.

When is the best time to give a thorough orientation? I suggest that the orientation be held as early as possible in the assignment time because the volunteer needs an immediate sense of being part of an ongoing saga, or organizational culture. Some argue that the volunteer needs some perspective before the information is of much value and will plan an orientation between the third and sixth month of a volunteer year.

If your organization's schedule is open enough and personnel's energy level is high, you might plan a two-phase orientation: the first session scheduled for the first or second week, devoted to sharing the basic information; the second, held three months later, devoted to listening and responding to your volunteer's questions.

An excellent time to present an orientation session for policy volunteers is between their election and the first board meeting. In organizations where volunteers come in one at a time, a group orientation may be planned during a slow period in the organization's calendar. If given at the end of a season it may inspire the seasonal volunteer to return the following year. If the orientation is held later, you may want to call it a "retreat," or "volunteer day." However, the purpose remains to deepen commitment, to keep volunteers informed and up to date.

What written materials do you share and how shuld they be presented? A notebook for board members is helpful. Included in this loose-leaf binder is: the mission statement; table of organization, including the board, officers and committee

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chairpersons; names, addresses, telephone numbers and profiles of the board; the current long-range plan and budget; copies of minutes of the last three board meetings; a yearly calendar of board meetings, retreats, annual meeting, parties, and other special dates; personnel policies that apply to volunteers; committee job descriptions, and other information that describes your organization, including a brief historical sketch. This is material to take home and read. You may also want to give each volunteer a copy of current printed materials such as a brochure that describes your organization and any fundraising materials.

The service volunteer should be given a volunteer manual complete with a mission statement; specific volunteer job descriptions; rules and regulations relative to security, safety, parking, etc.; a copy of the confidentiality form; current brochures and fundraising materials, personnel policies relative to volunteers; general guidelines for volunteers; a calendar of important meetings such as, orientations, evaluations, retreats, parties, annual meeting, etc.

What place do visual presentations have in a well-rounded orientation? Visual presentations can encapsulate the financial report, giving the viewer a quick picture of income sources and budgetary demands. If the organization has a video or slide show that it shares with the community, any new volunteer needs to view it in order to be prepared for questions that will inevitably come from friends and neighbors once they know someone who volunteers for your organization.

Well-informed, articulate volunteers are a tremendous asset to any agency. Beyond purpose, policies, facts and figures, they need to hear the language of the organization, know the agency's idiomatic expressions and acronyms, especially agencies associated with the government. In addition, they must gain a sense of heritage. The oral history tradition is an important tool in accomplishing this goal.

THE ORAL TRADITION IN ORIENTATION

Considering the problems associated with describing subjective information about an organization, I have been impressed by the work of Lee G. Bolman and Terrance E. Deal[1], two Harvard Business School theorists who suggest that organizations may be viewed through four frames: structural, human resource, political, and cultural.

The traditional orientation tends to present information relative to the first three frames, which are more relevant to an established business. This is usually not the type of organization where one volunteers. Therefore, it is important that volunteers and administrators of volunteers understand Bolman and Deal's fourth, or cultural, frame.

In trying to explore a human service agency's history using traditional indicators, one might fail to give value to the genius of the organization—its belief in itself and its mission—and how the zeal of earlier participants contributed to the organization's strength. Before we examine ways to articulate organizational culture, let us look at the theoretical concept of the cultural frame in the organizational system.

Bolman and Deal base the cultural, or symbolic frame on a series of assumptions about an organization and human behavior. They say:

1) What is most important about any event is not what happened but the meaning of what happened.

2) The meaning of an event is determined not simply by what happened but by the ways that humans interpret what happened.

3) Many of the most significant events and processes in organizations are substantially ambiguous or uncertain—it is often difficult or impossible to know what happened, why it happened, or what will happen next.

4) Ambiguity and uncertainty undermine rational approaches to analysis, problem solving, and decision making.

5) When faced with uncertainty and ambiguity, humans create *symbols* to reduce the ambiguity, resolve confusion, increase predictability, and provide direction. Events themselves may remain illogical, random,

fluid and meaningless, but human symbols make them otherwise.[2]

In practice, the organization utilizes these symbols to provide a sense of cohesiveness to cope with internal as well as external uncertainty. The symbolic approach places emphasis on, and gives value to organizational symbols: shared beliefs; rituals and ceremonies; myths and sagas; and the role of metaphor, humor and play. Each aspect has its own purpose in the overall culture of the organization.

Shared beliefs, traditions and values, give faith and meaning to action. Orientations, meetings, retreats, training, evaluations etc., which come under the heading of *rituals or ceremonies* provide social occasions, stabilize situations, reduce anxiety and convey the organization's messages to various constituencies.

Myths or sagas provide a link between the past, the present and the future, and give a sense of uniqueness.

> *For the organization, the saga enlists loyalty and energy that would be difficult to evoke in an institution without a saga. For the individual, the saga lends meaning and purpose to activities that might otherwise seem mundane and directionless.*[3]

Metaphor, humor and play:

> *provide a way for individuals and the organization to escape the tyranny of acts and logic, to view organizations and their own participation in them "as if" they were something new and different from their appearance and to find creative alternatives to existing choices.*[4]

The danger in all of this lies in becoming so insulated by symbols that a sense of reality is lost. Success lies in keeping organizational values in balance with the external climate or choices. Most volunteer organizations that have survived the test of time have done so because they found ways to make sense out of uncertainty. From the early days, and possibly unawares, the shared beliefs, rituals, sagas and unique approaches to problems combine to establish an organizational culture or climate which becomes the motivator of new volunteer effort. The advantage of the balanced orientation is to create awareness of this strong element in the voluntary organization.

How can we incorporate this symbolic frame in our orientations? It is the oral tradition of storytelling that best ascertains what is unique about the organization and lends itself to transmitting cultural information. Consider the way religious organizations thrive and convert people by telling their individual miracles; how politicians are constantly reminding us of the patriotism of past heroes; how fraternal organizations pass their secret rites. Rituals, ceremonies and traditions are at the heart of these organizations, meeting the need of people to share a common purpose.

The family is another grouping in which the oral tradition ensures that cultural heritage is passed down from generation to generation. At births, deaths, and weddings, stories of family members who won and those who failed are told and re-told.

These sagas, rituals and ceremonies build strong ties that sustain a group over the years. They produce strong cohesive cultures, a feeling of belonging. They give meaning to action. Hearing these stories, people, volunteers in our case, come to know what is expected of them and what is yet to be done.

Another part of an orientation is sharing visions—"I have a dream," Martin Luther King cried. The need to share dreams is particularly important for orientation in a relatively new organization that has a short history, however, every organization has to find creative ways to motivate commitment to future goals.

Successful corporations today believe in "telling their story." T.J. Peters and R.H. Waterman, in their book *In Search of Excellence*,[5] speak of corporate success being the result of: keeping management visible; lots of celebration; readily-available information, and telling THE story over and over again. This cultural attitude compliments both profit and nonprofit organizations and provides a remarkably good model for an orientation program.

USING ORAL HISTORY

My first experience with oral history came at a board retreat. Because there was an unusually large personnel change in the board that year, one of the goals of the retreat was to create an immediate sense of bonding—to erase the line between old and new members.

An Executive Director from a similar organization helped facilitate some of the meetings. The evening before had been social. For the morning session, we gathered in a large circle and the facilitator set the tone of the meeting by sharing some of his family's holiday traditions. Then he invited us to tell him our personal organization-related stories.

To prevent a great silence, a few of us had been told in advance about the format of the meeting and were ready to become "storytellers." Others quickly followed, adding their recollections about what it was like to volunteer when they began, about the people involved, etc. At some point, not too far into the program, the new members were asked to identify themselves and share why they volunteered, what potentially helpful experience they brought to the group, and what they wanted to hear from the group. As the group answered their questions, a sense of mutual respect began to build. There were smiles in contrast with the anxiety and self-consciousness I have frequently witnessed at other types of orientations. As a result of this high trust level, in the sessions that followed teamwork was evident.

Each orientation should have a slightly different focus for the oral history section. The format, like the organization, is never static—the criteria for a successful program is based on current need. An organization embarking on a new project may want to give more time to talking about the future. An organization experiencing a lot of turnover due to dysfunction may want to give extra time to the oral history portion of the agenda in order to better understand how they arrived at this place, so that new volunteers will have perspective as they help mold the future. You may find it helpful to trace your organization's evolution simply to establish a sense of accomplishment and pride.

Questions to consider as you look at your own symbolic frame are:

— What is the name of the person most identified with the founding of your organization, locally, nationally, internationally? What is his or her story?

— Which of your agency's sagas kindles the most fervor, loyalty, pride?

— What values does your organization encourage?

— Have there been major turning points in your history? Were they planned or unplanned, and how did you react to them?

— During the past year was there an event, decision or personnel change that altered the direction of your agency?

— Is it fun to be part of your organization some of the time?

— Is it difficult to be part of your organization at times?

— How do you support your volunteers during the difficult times?

— What are your dreams?

Questions relative to practical matters could include:

— How do we make policy?

— What part do volunteers play in the overall direction of the organization?

— What is our decision-making process—top-down, bottom-up, consensus?

— What are the rewards associated with volunteering in our organization?

— Is there opportunity for social interaction? When? How often?

— What is staff's attitude toward volunteers? Has this evolved over time?

Once the right questions are determined, the decision becomes who is available and the best qualified to tell the story? Long-term volunteers and staff are rich resources. It is wonderful to bring back an inactive volunteer and ask her/him to share stories about "the good old days" in the agency. Current staff can articulate the dreams. A formal or informal panel can play "I remember" which will keep alive the gems of history that get lost in formal reports and abbreviated historical sketches.

You may want to bring in a friendly outsider to ask the questions and a facilitator who will keep the meeting within the bounds of the questions at hand. There are many ways to share information but staying in one group is preferable to breaking down into small groups and reporting back because the goal of the exercise is to build a feeling of oneness—to create a strong US or WE.

The hardest part of such an orientation process is stopping the momentum once it builds. It is wise to agree to limit the time and to hold to the agreement whether it is a half-hour, an hour or more. This makes people want to come back the next time to hear other stories.

SUGGESTED THREE-HOUR AGENDA

In the following agenda I have assigned time to the various components of an orienation and included provision for something *to hold*, something *to see*, and something *to hear*.

15-45 Min.	• Welcome by president. • Introduction of leadership. • Review of Mission Statement. • Possible group introduction, name, role, place of residence if geographic location is important, potentially helpful history they bring to the group, and reason for volunteering. (But, I suggest this is better incorporated in the oral history section to follow.)
15 Min.	• Sharing printed materials, to be read later. • Very brief explanation of how the material is used. • Explanation of use of board notebook or volunteer manual.
15-30 Min.	• Visual Presentation. • Slide Show. • Charts of graphics to give a broad view of statistics relative to numbers served and financial considerations.
1-1½ hours	*Oral History*—The longer the introduction the shorter the oral history portion. Planners must decide which use of time will be most productive with their group.
30 Min.	• Vision for the the future given by top leadership, individual or group.

CONCLUSION

When new volunteers come to your organization they are to a degree "faced with uncertainty and ambiguity." When you present a balanced orientation complete with facts and figures and with insight into the organizational culture, in some measure you "reduce the ambiguity, resolve confusion, increase predictability and provide direction."[6] An orientation which gives volunteers an understanding of the organization's symbols, myths, rituals and sagas gives the volunteer the will and the strength of purpose, together with the hard facts, to start off toward commitment with both feet on the ground.

FOOTNOTES

[1]Lee G. Bolman and Terrence E. Deal, *Modern Approaches To Understanding and Managing Organizations* (San Francisco: Jossey-Bass Publishers, 1984).

[2]*Ibid.*, pp. 149-59.

[3]*Ibid.*, p. 166.

[4]*Ibid.*, p. 166.

[5]T.J. Peters and R.H. Waterman, *In Search of Excellence* (New York: Harper and Row, 1982).

[6]Bolman and Deal, *op.cit.*, pp. 149-150.