TAKING IT DIGITAL
New Opportunities for Volunteer Service
EXECUTIVE SUMMARY

Background
Junior Achievement® (JA) has an almost 100-year history providing volunteer-delivered financial education programs in K–12 schools. The Digital Volunteer Strategy Initiative, a product of a long-term strategic partnership between JA and the Citi Foundation, is designed to develop online educational assets and digital delivery tools for JA’s high school JA Personal Finance® course. The goals for the project are to leverage technology to provide expanded program delivery options that increase both the reach of JA programs and flexibility for participating volunteers.

This report is based on the best practice literature in online volunteering, volunteer management, and online education; a review of a beta set of online project tools; and interviews with JA volunteer managers involved in a recent pilot of the Initiative (Phase II of a two-phase pilot project). The study purpose is to identify issues organizations should consider in taking their volunteer/service programs into the digital realm.

Digital Volunteering and Project Overview
The Digital Volunteer Strategy Initiative is unlike many online volunteering opportunities, which often involve behind-the-scenes skills-based volunteer service (website design, research, pro-bono legal services) or low-commitment “micro-volunteering” projects that do not entail a lot of time or training. The project also differs in substantial ways from typical online volunteering programs in the education sector, the most prevalent of which are e-mentoring or e-tutoring assignments. These types of online service are usually limited to any time/anywhere email-based exchanges between volunteers and student mentees with varying degrees of structure and required commitment.

The Digital Volunteer Strategy Initiative, on the other hand, is much more complex and ambitious, involving many more moving parts in the provision of volunteer-led direct service educational programming. Essentially, volunteers teach a five-unit course to students in diverse school settings using a “blended” approach that involves both on-site and off-site components. After an initial face-to-face visit to the classroom to introduce the course, the volunteer remotely leads several sessions of online lessons, which requires onsite facilitation by the classroom teacher. Key tools designed for the Initiative thus far include video training to prepare volunteers for leading online presentations, a set of digital activities aligned with the units of the JA Personal Finance curriculum, and access to an online meeting platform with video and audio capabilities and capacity to include as many students as are typically enrolled in a school class.
**Best Practices**

The project reflects best practice and innovation in EVPs and is based on a shared mission. The project also benefits from JA’s well-developed volunteer management structure and deep knowledge of schools. A literature review on digital volunteering and volunteer management and interview data indicate that organizations that want to pursue similar Initiatives need to recognize that:

- All the best practices in offline volunteer management, from recruitment to recognition, apply to online programs with critical additional considerations.
- The involvement of volunteer managers in project design and implementation planning is essential for success.
- Time and planning for testing technologies and conducting practice runs with all stakeholders in all new settings need to be built into implementation plans in advance of service delivery.
- Engagement and communication strategies to address the potential isolation or disengagement of online volunteers and clients should be a special focus.

Best practice in online learning and course design is instructive for education partners in an Initiative like this one. Effective online instruction involves much more than simply translating offline materials to onsite settings. Curriculum, resources, and training for volunteers need to reflect key principles of effective online instruction, including those related to student-directed learning, pacing, communication, engagement, and tech support.

Key considerations for taking a volunteer program digital also involve all the required steps for launching any new initiative—upfront dedication of time and resources for project planning and design requirements, commitment to staff buy-in and change management processes, attention to logistics, and, in this case, extensive technology testing.

**Opportunities**

The partnership has taken thoughtful approaches in designing the Initiative thus far. The project focus on blended learning capitalizes on what volunteers and students and teachers alike consistently report they value most about the JA program—the interactions between volunteers and students. In addition, the high quality video training developed by the partnership provides a model for a toolset of training resources for volunteers, teachers, and students to support the scale-up of the Initiative. Finally, the project tools are all designed to maximize participant
engagement, reflecting a critical requirement for online interactions. The Digital Volunteer Strategy Initiative has the potential to

- provide greater flexibility for schools and volunteers
- benefit from the learning enhancements that technology-based instruction can provide
- reach more schools in a larger geographical area
- expand the volunteer base at both organizations
- “rebrand” volunteering efforts overall

With the completion of the Phase II pilot, what’s critical now is to generate the feedback loop and communication about what each stakeholder group has learned from these initial efforts to take the project to scale.

Moving forward, next steps involve developing upfront technical criteria for schools meeting optimum delivery specifications; designing and fine-tuning a comprehensive set of implementation resources to support volunteer training, volunteer management, and student and teacher participation; and working to make the course technology resources as integrated, simple, and uncomplicated as possible.
Background
Over the last few years, Junior Achievement USA® (JA) has been working with the Citi Foundation to develop online educational assets and digital delivery tools for its high school JA Personal Finance course, the latest in a strategic non-profit/business partnership to promote and deliver financial education programming to youth in K–12 schools.

The project, called the Digital Volunteer Strategy Initiative, grew from Junior Achievement’s traditional education model in which a trained volunteer delivers one of JA’s financial course curricula to students in a K–12 classroom. The Digital Volunteer initiative has introduced the use of a “blended” approach to course delivery—the volunteer presents some of the course lessons and activities face-to-face in the classroom and some of the lessons and activities digitally via an online meeting platform and an open-source learning management system. The goal is to leverage technology to provide expanded options for program delivery that increase both classroom and volunteer flexibility. Potential outcomes include increasing the reach of JA programs in schools across the nation and expanding the volunteer base.

In addition to its internal evaluation of the project, JA partnered with researchers Dr. Sarah Jane Rehnborg and Tracy Laughlin at the RGK Center for Philanthropy and Community Service at the University of Texas at Austin’s LBJ School of Public Affairs to conduct a best practices alignment study of the initiative. The mission of the RGK Center is to build knowledge about nonprofit organizations, philanthropy, and volunteerism. RGK faculty and staff are considered national leaders in the field of volunteerism, with a research focus on community engagement and volunteer management.

Purpose & Methodology
A Phase I pilot of the initiative was conducted in spring 2013. Based on feedback from the initial pilot project, a second pilot (Phase II) was implemented in spring 2014. This report is focused on Phase II.

Seven JA area offices representing cities and regions across the country agreed to participate in the Phase II pilot project. These included:
Five of the seven sites had completed course delivery at the time this report was written and were included in data collection processes. Methods included document and project asset review, a literature review, interviews with JA area coordinators/staff involved in the implementation project, and volunteer surveys.

The goal of this study was to assess the alignment of JA’s Digital Volunteer Initiative with best practices in volunteer management and virtual volunteering. Accordingly, this report is focused on strategies to support implementation and should not be viewed as an evaluation of the Phase II pilot.

**Document and Asset Review**
To support the study, Junior Achievement provided access to key documents and technology assets associated with the project, including the following:

- Phase I pilot evaluation report
- existing face-to-face Junior Achievement course training materials
- digital volunteer training materials (print and video) developed for piloting in Phase II
- online student activities developed for piloting in Phase II

In addition, the researchers participated in some initial training sessions for JA area coordinators focused on use of the online meeting platform. After interviews, some individual JA area coordinators also provided copies of documents they developed to support the project and example communications with participants.

**Literature Review**
This report is based on a review of the literature across several domains. Research on digital or virtual volunteering is limited at this time, and the existing body of existing literature is largely identified and summarized by Cravens and Ellis in *The Last Virtual Volunteering Guidebook* (2014) and through the Virtual Volunteering wiki maintained by the authors at http://virtualvolunteering.wikispaces.com/. The researchers also consulted the research base on volunteer management, online instruction and training, blended learning, and employee volunteer programs.
Interviews
Implementation data were collected through phone interviews with staff coordinating the digital delivery option at five of the seven sites across the country participating in the implementation project. The JA USA national manager of the project shared information about the study with area coordinators and facilitated introductions with the researchers, providing contact information and area dates for course delivery. The researchers then worked with area coordinators directly to schedule interviews soon after or just before course completion. Interviews were conducted in March and April 2014. Interview protocols contained questions focused on coordinators’ experiences at every stage of the volunteer management cycle, from recruitment to recognition, with emphasis on the additional supports or adaptations to current practice required to implement the digital delivery option working with schools, teachers, volunteers, and students.

Surveys
Online surveys of volunteers asked participants about their previous volunteer and online presentation experience; their perceptions of the effectiveness of the digital delivery training, course materials, and course delivery tools; successful and effective delivery and volunteer support components and areas for improvement; and overall satisfaction with the experience. An e-mail providing the study background, consent information, and links to the survey were distributed to volunteers via area coordinators. Of a total of approximately 10-15 potential volunteer respondents, six completed surveys. This low response rate was anticipated as the study survey was voluntary and conducted in addition to JA’s end-of-course survey. Due to the low response rate, data from the survey were not used in the report.

Structure of this Report
This report provides a summary of considerations for implementation of digital volunteer initiatives reflecting the best practice literature across a variety of domains with emphasis on what is known about effective practice in volunteer management.

The first section briefly summarizes best practices in employee volunteer programs (EVPS) as the specific context for this project, followed by an overview of digital volunteering and a description of the initiative. A summary of best practices in volunteer management follows with specific considerations related to digital volunteering. Because the initiative involves educational programming, recommendations from the literature on online course design and delivery are then outlined. The following section provides considerations for launching any new volunteer initiative. The report closes with identification of opportunities and challenges related to the initiative with recommendations and next steps for moving forward.
Best Practices in Employee Volunteer Programs
The program design and result reflect many of the key characteristics and practices of effective corporate volunteers. The program:

• is clearly aligned with the company mission and involves focused activity that effectively targets stated goals
• provides measurable benefits to the community
• leverages employees’ skills and business assets and resonates with workplace culture
• offers enriching service opportunities that also have potential for developing employee volunteers’ training and presentation skills

Extending this collaboration into the digital realm was an obvious next step for the partnership, which benefits not only from a shared mission but JA’s extensive experience in volunteer management and its relationships and deep understanding of schools and classrooms.

Overview of Digital Volunteering
In *The Last Virtual Volunteering Guidebook: Fully Integrating Online Service Into Volunteer Involvement* (2014), Jayne Cravens and Susan J. Ellis, the nation’s leading experts in online service, assert that thinking about digital volunteering as a discrete or separate component of community service is becoming outdated. Digital service, they say, is just part of any real-world volunteer experience today as most traditional on-site or face-to-face volunteer activities have some form of online component. In the business world, taking it digital, says Forbes *Leadership* blogger Ryan Scott is “just one more tool savvy companies are using to sharpen their employee volunteer programs, and by extension, their overall corporate philanthropy complexion.”

Many digital volunteering opportunities can be characterized as “skills-based” projects in which individuals work remotely to provide behind-the-scenes services such as website or logo design, data entry, research, or pro-bono accounting or legal services free-of-charge to nonprofits and community organizations. Some types of online service are referred to as “micro-volunteering”—one-time or short-term, low-commitment tasks performed via a smart phone or Internet-connected device for which no training or prior knowledge are required. (For more information about skills-based and micro-volunteering, see this Points of Light Corporate Institute summary.)

JA’s Digital Volunteer Strategy Initiative, on the other hand, is somewhat unique in that

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2 “The Virtues of Virtual Volunteering and Online Fundraising” (para. 2), 2/23/2013.
it offers a longer term digital volunteer opportunity that does not require pre-requisite skills but that involves training to provide direct services online to Junior Achievement’s clients—students and teachers. In the education space, the most common digital volunteer direct service initiatives are one-on-one telementoring or tutoring projects in which volunteers work with individual students, youth, or mentees of any age. The JA effort is obviously much more ambitious and complex than a simple e-mentoring program and entails digitizing components of a direct service educational delivery model in which volunteers present a five-hour course to a classroom of high school students in a school setting. This involves development and use of a sophisticated technical infrastructure (or at least more sophisticated than email) for service delivery as well as comprehensive volunteer training and implementation supports to ensure effective delivery in diverse K-12 contexts.

JA Digital Volunteer Strategy

Digital Adaptations to Onsite Delivery Approach

In traditional face-to-face delivery of a Junior Achievement course, the volunteer receives training; a class kit of materials, including a curriculum guide for volunteers and teachers; instructions for coordinating with the teacher; and tips and a structured protocol for classroom delivery of a pre-designed series of lessons. In taking this model digital—even with a blended approach that includes both face-to-face and online delivery components—a host of additional considerations come into play.

Based on the first pilot of the digital delivery approach in spring 2013 (Phase I), which involved a limited online facilitation component, JA developed a beta set of implementation supports for the blended delivery model implemented in Phase II. These included a volunteer training video on delivering online presentations and a set of online lesson activities that have been adapted from each of the five units of the JA Personal Finance® curriculum. JA also provided subscriptions to area offices to an online meeting platform, Global Meet with capacity to accommodate typical public school class sizes for online class delivery.

These digital assets were tested during the Phase II pilot project in spring 2014 in more than 15 schools in seven test cities where Junior Achievement hosts regional offices. A typical format for delivery during the second pilot involved the volunteer going to the school site for the first class, introducing him or herself to the students, outlining the course goals and requirements, and then delivering the first lesson on site in the classroom. Subsequently, the volunteers delivered lessons 2, 3, and
4 digitally from their office or home with students participating in a school computer lab. At the end of the course, volunteers went back to the classroom to deliver the fifth and final lesson and wrap up the course. Based on individual site and volunteer circumstances during Phase II, a variety of alternatives to this delivery structure were tested with the potential for offering multiple options tailored to specific needs.

**Digital Delivery**

During the digital delivery sessions, the volunteer convenes the class online through the meeting platform (GlobalMeet) and introduces the lesson and key instructional points. During this part of the lesson, the volunteer is typically visible to the class via video feed in the meeting platform display (which can be projected). The meeting platform allows volunteers to interact with students via one-way or two-way video and audio and online whiteboard, chats, and polling features. After introducing the lesson material to the class, the volunteer then directs students to the learning management system (Canvas) to complete the lesson activity and quiz. At the end of the session, the volunteer reconvenes the class through the online meeting platform, answers questions, and reviews key learning points before signing off. Individual JA offices were free to adapt delivery to particular circumstances or formats, and some, during this testing phase, doubled up lessons for an accelerated course schedule.

While this may sound simple, with so many more moving parts, and a service context that demands success—engaging content and activities and near-flawless delivery—it’s critical to recognize that even with a top-notch volunteer management system in place, it will take considerable time and energy to explore and address specific implementation requirements associated with the new digital delivery model.

**Best Practices in (Digital) Volunteer Management**

The best practice literature on digital volunteering is clear. What’s good practice in “offline” volunteer management applies to the digital realm, albeit with some additional considerations. As a volunteer-driven organization with a close to 100-year history delivering financial literacy education programming to students in grades K–12, Junior Achievement has a well-developed volunteer management structure and comprehensive, high-quality volunteer resources. Even for an established program, though, the introduction of digital components requires focused efforts at each stage of the volunteer management cycle to re-think, re-tool, and re-invent processes, strategies, styles, and resources.
Volunteer Management Cycle

Broadly speaking, the core components of the cycle of volunteer management include:

- Organizational engagement and preparation
- Volunteer recruitment and screening
- Support and supervision
- Recognition and evaluation

Through intentional activity associated with each stage of the cycle, leadership and organization staff

- consider the alignment and purpose of the volunteer activity in the context of its mission and organizational readiness
- plan and organize the volunteer program and volunteer opportunities
- implement and support volunteers through training, coaching, and performance assessment
- review and report achievements through volunteer recognition and refine programming based on participant feedback and evaluation

Figure 1—Circle of Verbs

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ORGANIZATIONAL READINESS

Goals and commitments, community awareness, existing efforts, human resources and staffing, planning, policy and liability, preparing for change, defining volunteer tasks, funding and resource needs, recordkeeping

- What do we hope to achieve through this effort? Does it have leadership support?
- Is this the right time to be initiating this project? How long will this effort take us?
- Who needs to be aware of our work? Do we have the support of those in key leadership positions?
- In what other ways do we currently engage volunteers? Is this effort consistent with our existing efforts? Are there ways to combine these efforts efficiently?
- What staffing considerations are involved? Are existing staff ready and able to implement? Are there training needs for staff?
- Who is the point person or project lead in each organization? Do they have the time to dedicate to organizing and overseeing the initiative? What are roles and responsibilities for all staff involved?
- What risks are involved? Is there existing policy that will help or hinder the effort? What new policy needs to be considered to cover the new initiative?
- Who will be impacted and how can we prepare them for change? How quickly or slowly can we bring everyone up to speed? What opportunities for gathering input or feedback will help build buy-in?
- What will volunteers be asked to do? What training will be required? Do we have written job descriptions that clearly articulate the service commitment?
- What funding is available to support the effort? Where will the service take place? What materials and equipment are required?
- What documentation will be collected, required? How can data be integrated into existing systems? What new data/system requirements are involved?

VOLUNTEER RECRUITMENT, TRAINING, AND ORIENTATION

Volunteer base, screening, outreach and recruitment, volunteer readiness

- Who are potential volunteers? What are their needs? What skills must our volunteer have?
- What kind of commitment are we asking for? What criteria do we use to ensure the right fit? How do we reach our volunteer pool?
- What are the best strategies for promoting the opportunity? How can we expand our volunteer base?
- What do volunteers need to know and be able to do? What orientation and training will volunteers need before service delivery? What materials and equipment will be required? What the expected outcomes of service?
- What supports will volunteers need during service delivery?

IMPLEMENTATION SUPPORTS AND MONITORING

Supports for service delivery, communication, and monitoring processes

- Do volunteers have quality service delivery tools?
- How will we check in with volunteers?
- What communication processes are in place for ongoing communication between volunteer managers or staff and volunteers, volunteers and other volunteers, and volunteers and clients?
- What if there are problems? What back-up plans or processes are in place?
- How do we assess volunteer performance? What feedback do we collect and from whom?

RECOGNITION AND EVALUATION

Rewarding and retaining volunteers, data collection and evaluation for progress monitoring and program improvement

- How will we recognize volunteers? What will make them volunteer again?
- How will we evaluate this effort? What data will we collect?
- Did we meet our targeted outcomes?
- What progress was made in achieving program goals?

Figure 2
As indicated in Figure 2, the development of quality volunteer programs requires attention to critical questions—upfront and throughout the process—that are similar to the types of questions used to guide any new project launch. These include careful consideration of goals and timing; defined expectations; leadership and staffing; planning, organizing, and resource allocation; development and testing; timelines for “deliverables”; and project documentation and other project management processes, including assessment and debriefing.

Management of Digital Volunteer Programs

In adding a digital component to a volunteer program, The Last Virtual Volunteering Guidebook provides the following additional recommendations for organizations and volunteer managers:

- Be clear about your reasons and goals for engaging digital volunteers
- Make sure your organization is ready for digital volunteering
- Make sure volunteer managers are on board and fully prepared
- Develop clear technology specifications and written volunteer job descriptions
- Review digital-specific volunteer screening processes and criteria
- Make offline training and resources available online
- Conduct testing and practice sessions using applicable technologies and software
- Provide guidance to volunteers for online interactions and address issues of confidentiality and privacy
- Provide an accessible key contact and regular communication schedule
- Develop a reporting process aligned with digital service
- Consider online forums, discussion groups, and team structures for digital volunteers to share information and work together
- Develop appropriate monitoring processes and review safety and risk management issues
- Capture and review online interactions in direct service settings
- Develop new and appropriate ways to recognize online service

Key guidance from across the research literature on digital volunteering includes the following cautions:

- Recognize that it takes time, planning, and other resources to design, test, and effectively implement a digital volunteer project, especially a collaborative project.
• Invest in “change management” processes that include gathering feedback from staff and other stakeholders and developing training and resources to support integration of new approaches into existing practice.
• Plan for the fact that it is inevitable that the technology will fail at some point. This backup plan could include the use of print outs, one pagers and other supplemental materials that can be used in the event of a technical glitch.
• Take steps to promote engagement and guard against the potential isolation of remote learners and volunteers that can occur with online interactions.

**Best Practices in Online Learning**

Because this digital delivery project is focused on the delivery of a course curriculum, some lessons from the best practice literature on online learning and course design are also instructive for JA and education partners in similar projects responsible for development of online curriculum, lesson resources, and volunteering training.

Success in online instructional design and delivery include the following critical considerations:

- ability of presenters to cultivate an online presence
- content and activities that are appropriate and aligned with the online learning setting
- inclusion of extra and focused strategies to engage students
- technology that works smoothly and regularly

“Online courses do NOT function just like face-to-face classes, and designing the online course is not a simple matter of putting the material on the web” (pg. 1), says Paul Creasman in “Considerations in Online Course Design.” The pedagogical implications for using a new medium for course delivery require developers to think differently about instruction and recognize the fact that the online course and the real-world classroom are two entirely different environments. Among the differences are the requirement to shift from teacher-focused to student-centered teaching, necessary adjustments in the pacing of instruction, the lack of immediacy in communication between the classroom and the offsite instructors, and the inability for the presenter to remotely observe or intuit participant engagement and understanding.
Effective Online Instruction
Guiding principles for distance learning from the American Distance Education Consortium include:

• Design for student-directed learning that is aligned with specific outcomes and appropriate for the context and local environment
• Support learner needs, including upfront expectations, orientation, and site-based tech support
• Develop and maintain the technological and human infrastructure, including adequate technology planning, facilitation, and staffing
• Sustain the administrative and organizational commitment with integration into the mission and existing structures.

In addition, a field survey of educators summarized in e-School News offers the following specific requirements for effective online learning:

• Onsite facilitation for learners and struggling students
• Well-trained instructors who have developed the skills for providing engaging online instruction
• Rigorous and engaging curriculum
• Training and clear expectations for students and classroom teachers in how to use the technology and complete the course

The number and types of organizations and individuals designing and delivering online courses grows every day, and there is a wealth of models and resources for teaching online. College professors, education groups, corporate trainers—they all know how or are learning how to do it, and, they are being paid to do so. What is unknown when working with volunteers, however, is their proficiency in the world of online instruction. Many are likely to need well-crafted educational resources and detailed training and course supports to ensure they are successful in their service efforts and that they are able to provide valuable educational experiences for students and teachers.

Launching a New Volunteer Initiative
It’s important to keep in mind that in the context of the JA partnership, the launch of the Digital Volunteer Strategy Initiative is new, and there is a dearth of models available that take into account the specific characteristics of this non-profit, volunteer-driven education program.

The obvious question here is how best to take JA’s existing model of a volunteer-delivered education program into the digital realm without compromising JA successful model.

Goals
First, what are the goals of the program? Goals include leveraging new technologies for...

- enhanced student learning
- greater flexibility for schools and volunteers
- potential expansion of the volunteer pool
- reaching more classrooms

In thinking about going digital, organizations should carefully consider the potential benefits and the potential drawbacks. In this case, the loss or decrease in opportunities for personal interaction between the volunteers and students is something to think about as it is a hallmark benefit of the JA program. Overall, to what extent are the disadvantages of a digital delivery focus balanced by the extended reach to schools and students that would not otherwise have the opportunity to participate in a JA program at all? How can the need for greater flexibility for some volunteers be balanced with student preferences and program options?

Investment
The second thing to think about is the upfront investment. Cravens and Ellis in *The Last Virtual Volunteering Guidebook* and Judi Harris (2000) in “Taboo Topic No More: Why Some Telecollaboratives Fail” emphasize the need to invest in the offline, up-front time and energy required for effective planning, designing, and organizing collaborative technology-based projects in education. Nothing about this project should be thought about as “free.” Engaging volunteers in this way involves real costs in terms of the time and effort required for:

- planning
- design of high quality digital resources and delivery tools
- developing comprehensive training and guidelines for all the individuals involved—in other words, not only for volunteers, but also for volunteer managers, for tech support, for classroom teachers, and for student participants
- ensuring the technology works
- onsite facilitation of course delivery by the volunteer manager or the teacher
- gathering evaluation data specifically related to the program effort and ways to make it better

Addressing one of the five key false assumptions about volunteering that present the top challenges to volunteer engagement, Rehnborg and colleagues (2009) point out:

> While it is true that volunteers operate without receiving market-value compensation for the work performed, any serious organizational initiative—of any type—requires a strategic vision and an outlay of time, attention, and infrastructure.6

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6 *(Pg. 5) Strategic Volunteer Engagement: A Guide for Nonprofit and Public Sector Leaders.*
This level of project management requires point persons from each organization working collaboratively to plan and organize the volunteer experience from start to finish. With the completion of the Phase II pilot, what’s critical now is to generate the feedback loop and communication about what each group has learned from these initial efforts to take the project to scale.

**Opportunities**

Engaging in direct online service that is key to the organization’s mission reflects on how the organization is viewed by clients, customers, the general public, the press, donors, and any other stakeholders.

—The Last Virtual Volunteering Guidebook, pg. 109.

In taking it digital, both Junior Achievement and the Citi Foundation are pushing the needle on their volunteer programs. The implications for JA go far beyond just expanding its traditional volunteer program with online service options. The Digital Volunteer Strategy Initiative has huge potential to create new opportunities for volunteer outreach, for course curricula that are enhanced by the benefits that digital learning can provide, and for innovative service delivery options and partnership models that could potentially reach more schools and provide innovative options for volunteers.

At another level, successful scale-up of this initiative could serve to reframe JA’s organizational identity in the field and help to re-brand volunteerism as a front-line 21st century endeavor.

From the corporate social responsibility perspective, the project is an example of innovation in EVPs. It illustrates an effort to fold volunteering more seamlessly into the workplace experience, blurring the boundaries that separate work and volunteering. The digital volunteer dimension also allows employees to “stretch”—develop additional professional skills and gain experience in, in this case, online presentations and training. This results in maximizing the quality of the volunteer contribution through the support for the development of digital volunteer training resources and online course activities.

Several key design features of the Digital Volunteer Strategy have thus far proved effective and should be continued and developed as the effort evolves.

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8 (pg. 6), Trends of Excellence: Innovations in Employee Volunteering.
The blended face-to-face and digital course delivery approach used in the JA project reflects practical and thoughtful consideration of how to combine what has always worked well for Junior Achievement and its volunteer-driven programs and new opportunities and options for providing JA education programs in schools. From years of experience, Junior Achievement knows that one of the main things that students, teachers, and volunteers enjoy about the courses is the opportunities for interaction. JA volunteers consistently report that a key benefit of the experience is going into classrooms, meeting students, and serving in authentic teaching roles. Students and teachers also like having a new face in the classroom and benefit from the volunteer’s expertise in the financial field. In other words, the volunteer interactions and relationships with students are key and should not be lost. Requiring that the first class session is conducted onsite allows the students to get to know the volunteer and establish more personal connections that then facilitate the online relationship between the volunteer and students (and teacher) and, subsequently, effective lesson delivery and overall satisfaction with the program.

While the blended approach does not completely take out the requirement for volunteers to travel to sites, it does decrease or can decrease significantly the amount of time and travel required of the volunteer. It also requires that teachers facilitate course delivery when volunteers are not on site. This involves class preparation and classroom management components as well as technical troubleshooting, highlighting the need for teacher training to support course delivery.

JA can offer the blended digital delivery option as a program service alternative that provides flexibility and potential time savings for schools and volunteers that aren’t available with the face-to-face only delivery model. However, not all schools and teachers and volunteers will want to use the digital option, maybe especially those who have become familiar with the face-to-face model. What’s important is that having the option of digital delivery extends JA’s reach, enabling it to offer the program in schools that previously were too far away from JA offices for volunteers to make a commitment to weekly classroom visits.
In addition, the project will benefit in the short and long term from student interest and engagement in online activities, which also has the potential to influence and improve course design and curriculum. Many view blended learning as “a pedagogical approach that combines the effectiveness and socialization opportunities of the classroom with the technologically enhanced active learning possibilities of the online environment,” (pg. 3)\(^9\) promoting a shift from a lecture format to student-centered learning. In time, perhaps with development of standalone instructional resources, and in those cases where remote service delivery is the only option, a JA volunteer of the future could function more in the role of a facilitator or moderator of an online student-directed learning forum. The volunteer facilitation is a key component that distinguishes JA from the purely online self-paced student financial education products currently available. In any case, the Digital Volunteer Strategy is well aligned with the emerging growth and adoption of online blended learning in schools and districts across the country and interest and demand for the digital delivery option is likely to grow.\(^{10}\)

**Digital Training Models**

The partnership has begun development of resources specifically designed for digital delivery. Specifically, with the support of the Citi Foundation, JA developed a high quality video training module that is accessible online and provides detailed volunteer training for delivering online presentations. The content of the training provides clear and detailed information for preparing remote settings for online presentations. Volunteers and volunteer managers alike reported that this resource was effective in helping volunteers prepare for remote lesson delivery, serving as a model for additional digital delivery training resources.

Using this as a model and other print resources developed for the Phase II pilot, JA can create a suite of online digital delivery training resources that provide a clear step-by-step picture of how digital delivery unfolds in the classroom. Feedback from volunteers and volunteer managers will be the best guide for identifying what additional training components are needed.

**Focus on Engagement**

One of the pitfalls in digital communication and online teaching is the potential for participants who aren’t in the same room together to disengage. Reflecting best practice in online teaching and learning, the digital delivery training materials, the online meeting platform, and online student activities developed for the JA initiative were all designed to support participant engagement strategies. Additional

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10  *Keeping Pace with K–12 Online and Blending Learning: An Annual Review of Policy and Practice, Evergreen Education Group (2013).*
training materials that help volunteers manage the pace of online communication and strategies and approaches that volunteers should use to interest and engage students, including personal anecdotes, pacing, and chat and polling techniques to keep students interacting, are needed. Participants reported that additional training for volunteers and guidelines for students and teachers would support dynamic and successful digital course delivery.

**Moving Forward**
Launching an initiative like the JA Digital Volunteer Strategy involves the need for well-articulated expectations, careful planning, and innovation. It will also require time to work out the kinks. For organizations considering taking their volunteer programs digital, the following takeaways are offered for consideration.

**Volunteer managers can make or break a digital project—Involve your volunteer managers from start to finish.**
Any new initiative that involves substantial change to existing practice is likely to meet with some initial resistance, but it’s critical to include staff with the deepest knowledge and experience in project design. Volunteer managers are the people who can make or break a digital volunteer initiative. Their knowledge and expertise for working with volunteers onsite and face-to-face should inform the design of a digital project from start to finish as they know what works in volunteering (how and why) for the organization. Just as importantly, their questions and concerns about a new approach should inform the design of digital projects as they need to understand and be intimately involved in implementation details and logistics. Finally, their feedback and suggestions during testing, implementation, and after the fact are critical for the success of a digital project.

**Commit the time to design, test, and practice with technologies.**
While digital delivery options may, eventually, provide some time savings for volunteers, at least at this stage, there’s a lot more advance preparation time required of all stakeholders. For one thing, there are multitudes of ways that technology can fail. It could be a volunteer’s connection, a school connection or network, a firewall, a security setting or district Internet policy, device compatibility issues, the tools and resources themselves, user error… you name it. And if it doesn’t work, and the volunteer is not in the same room with the client, there has to be a viable Plan B. Every digital asset and every online delivery process should be tested and practiced in advance—by designers and developers, then volunteer managers, then volunteers, then teachers and students. No one should attempt to conduct a digital delivery session without trying it out first to become familiar with it and its functionality in the setting and under the conditions in which the volunteer activity will actually take place. There should also be alternative plans in place if the technology cannot be made to work quickly.
Taking it digital is more than simply transferring face-to-face materials and processes to an online format.

In summarizing the weaknesses of online learning, the Illinois Online Network provides the following guidance:

Curriculum and teaching methodology that are successful in on-ground instruction will not always translate to a successful online program where learning and instructional paradigms are quite different. Online curriculum must reflect the use of dialog among students (in the form of written communication), and group interaction and participation. Traditional classroom lectures have no place in a successful online program. Education of the highest quality can and will occur in an online program provided that the curriculum has been developed or converted to meet the needs of the online medium. (para. 11)

Training resources and curriculum materials as well as the online delivery platforms must be re-conceptualized to reflect the limitations and opportunities of online learning.

For JA, the most immediate and direct potential benefits of the Digital Volunteer Strategy Initiative include offering more flexibility in community service, broadening the volunteer base, and providing expanded and enriched financial education opportunities for schools and students and skill-building opportunities for volunteers. But the effort has considerable additional potential.

According to Judi Harris, “Beyond effective planning, the key to success is for online project work to become so intrinsically rewarding and extrinsically valued that the additional time and effort necessary to create powerful new telecollaborative learning experiences” are seen as worth it.¹¹

To realize this potential, developing upfront screening for schools meeting optimum delivery specifications; designing and fine-tuning recommended comprehensive set of implementation resources to support volunteer training, volunteer management, and student and teacher participation; and working to make the course resources as integrated, simple, and uncomplicated as possible should be the focus moving forward.

¹¹ Pg. 61, “Taboo Topic No Longer: Why Some Telecollaborative Projects Fail.”
Bibliography


