



Planning On-Site Orientation & Training

A resource for AmeriCorps VISTA supervisors

On-Site Orientation and Training

A VISTA member's orientation begins with the Virtual Member Orientation (VMO), which combines self-directed online tutorials on the VISTA Campus with live webinars, and continues through to the face-to-face On-Site Orientation and Training (OSOT) provided at the project site. OSOT begins on the VISTA member's start date. During OSOT the VISTA is formally oriented to the assignment, sponsoring organization, and community by the project sponsor/supervisor. The OSOT differs from VMO in several important aspects:

- The OSOT is presented by the project sponsor/supervisor, and addresses the specifics of the project, the VISTA's assignment, and the community; the VMOs are conducted on a national basis by Corporation for National and Community Service (CNCS) staff, presenting a national curriculum.
- The OSOT is a longer, slower paced training, typically lasting 4-6 weeks after the VISTA member's start date and is implemented by the supervisor, co-workers, community members, and others; the VMOs are self-directed online tutorials on the VISTA Campus and live webinars which typically take about two weeks to complete prior to the VISTA member's start date.
- The OSOT prepares a VISTA member to serve effectively in the sponsoring organization and the target community; the VMO orients the VISTA member to the VISTA program and support system of CNCS.

Purpose

OSOT is the second step in the VISTA member's training continuum. Its primary purpose is to build on concepts introduced through the VMO. OSOT introduces the VISTA to the sponsor, the community, and the goals and operation of the VISTA project, and provides the VISTA member the basic knowledge and skills they need to get started on the project.

The scheduling of OSOT should be timely enough to provide the VISTA member with the immediate information and skills needed to begin their service, yet flexible enough to allow VISTA members to satisfy personal and adjustment needs.

Sponsor's Responsibility

Develop an OSOT plan that is consistent with project goals and that meets minimum desired outcomes.

- Submit OSOT plan to the Corporation for National and Community Service state program office 30 days prior to the VISTA's start date
- Involve the VISTA in an ongoing evaluation of activities of OSOT and adjust plans, as necessary, to meet individual VISTA's needs
- Begin process of defining in-service training needs based on OSOT outcomes and evaluation

NOTE: For intermediary VISTA projects, sponsors should provide a general OSOT to all VISTAs to orientate them to the sponsor, the larger VISTA project, and relevant policies and procedures to the VISTA project. Additionally, sponsors should be collecting and reviewing OSOT plans from each site 30 days prior to the VISTA's start date. The site OSOT plans should be on file at the sponsor and available for review by CNCS.

OSOT Learning Objectives

By the end of OSOT, the VISTA member should have achieved the following learning outcomes:

Understand common expectations and agreements for a working relationship between the VISTA member and supervisor:

- Supervisor's other roles and responsibilities
- Supervisor's management style
- Scheduled meetings and interactions between VISTA member and supervisor
- Clarification of the lines of communication between VISTA member and supervisor
- Delineation of the support provided to the VISTA member
- Mutual understanding of the terms and conditions of VISTA service
- Chain of command

Understand the mission and goals of the sponsoring organization:

- Mission
- History
- How the organization functions (as a nonprofit, municipality, state, county, or federal entity)
- Role in the community
- Staff (introductions)

Recognize the context of the VISTA project:

- VISTA project and its history
- How and where does the VISTA member fit
- Introduction to the community
- Socioeconomic and political structure of the community
- Potential resources that can be applied to achieve project goals
- History and present status of community self-determination and problem-solving efforts

Understand the organization's culture and policies (and where VISTA policy overrides organizational policy)

- Roles and responsibilities
- Time and attendance, service hours
- Personal leave
- Medical leave
- Teleservice
- Mileage reimbursement policy and procedure
- Working with the media
- Fundraising activities
- Evaluation of individual VISTA members and of the project
- Reporting requirements for the VISTA project
- Develop, with the supervisor, a personal work plan, based on the VISTA Assignment Description (VAD), that specifies:
 - Tasks and activities for a specific period to accomplish the goals and objectives in the project work plan
 - Training needed for the assignment, which builds on the VMO and OSOT toward the personal and professional development of the VISTA member

Depending on the project, the supervisor may deem it necessary for the VISTA member to receive training in such areas as computer skills, public speaking, group facilitation, conflict resolution, needs assessment and asset mapping, grant writing, and negotiation and interviewing skills.

A VISTA member may also need specific training in issue areas and on such topics as domestic violence hotlines, early childhood literacy, laws regarding foster care, credit management, and microenterprise VISTA development. The VISTA member's actual needs depend on the requirements of the project and the experience, skills, and educational background the VISTA member already possesses.

Suggested Orientation and Training Methods

The methods the supervisor may use for orientation and training include:

- Brainstorming, discussion, and negotiation between the sponsor and VISTA member, or among the supervisor, VISTA member, and a larger team (e.g., with other project staff)
- Interviews and discussions with key community leaders or even with a random sample of residents and community members
- Homework – e.g., have the VISTA member review the project proposal the sponsor submitted to CNCS, the Memorandum of Agreement (MA) between CNCS and the sponsor, the VAD, and other pertinent organization position papers
- Field trips and strategically assigned tasks the VISTA member needs to complete
- Shadowing others who are performing similar work
- Attendance at staff, advisory board, and community meetings
- Asking staff, colleagues at other organizations, and experts to share some time reviewing their “tricks of the trade” or providing specific skill training
- Free or low-cost skill training from various community resources, such as:
 - Community colleges
 - Libraries
 - Community resource and technology centers
 - Trade associations
 - Community adult education programs
 - Incorporate the resources located on the VISTA Campus into the orientation process including [Early Service Coursework](#).
 - Guide the VISTA member to the VISTA Professional Webinar Series calendar of events, located on the VISTA Campus (<http://www.vistacampus.gov/webinars>)
 - Guide the VISTA member to the in-depth VISTA Blend courses accredited by the American Council on Education. The two courses address “Volunteer Mobilization” (10 weeks to complete/3 credit hours) and “Resource Development” (13 weeks to complete/3 credit hours). The registration page is located on the VISTA Campus (<http://www.vistacampus.gov/vistablend>)
 - Additional resources are available on the CNCS Knowledge Network at <https://www.nationalservice.gov/resources>

OSOT Design – Example 1

I. Prior to First Day at [PROJECT]

- Send Volunteer Assignment Description to the VISTA member
- Send VISTA information required to serve at [PROJECT] including.... [Examples: Oath of Confidentiality; code of conduct, etc.]
- Add VISTA to relevant communications and invite his/her to events and/or trainings
- Send first day logistics information including, what time to arrive, where to arrive, what they may need to bring and the expected dress code.
- Prepare VISTA workspace:
 - Secure phone access, a computer and desk space
 - Secure any keys the VISTA may need
 - Prepare email account
 - Provide instructions and prepare access to software and relevant accounts the VISTA will be using (i.e. a shared file drive or network, survey monkey, constant contact, social media accounts, etc.)
- Inform other organization staff of the VISTA member's arrival and role.

II. First Day

- Human Resources
 - Introduce to staff/key partners
 - VISTA receives the program and Employee Handbook (with clarification on policies that may not apply to VISTA)
 - Review with Supervisor general policies:
 - Personal and Medical Leave
 - Record keeping
 - Office hours
 - Breaks & lunch
 - Dress code
- Office/Building Tour & General Housekeeping
 - Tour of the building and parking lot
 - Tour of offices and host institution

- Kitchen guidelines
- Review location of office/bathroom supplies
- Provide office and any other relevant keys
- Basic review of calendar and schedule
- IT & New Employee Set Up
 - Set up computer and review email and other primary software usage
 - Basic review of phone system
- VISTA
 - Review Terms and Conditions with VISTA member
 - Explain how VISTA fits into the organization
 - Attend “Launching your VISTA Service Webinar” at 3:00 pm Eastern Time.
 - Submit completed Oath form after webinar to vmsu@cns.gov

III. First Week

- Human Resources
 - Review VAD with VISTA – ensure expectations are clear and questions are answered
 - Review check-in schedule and processes to communicate progress on projects outlined in VAD
 - Review additional meetings VISTA is expected or encouraged to attend
 - Review with Supervisor formal office policies/procedures:
 - Time Sheet
 - Time off request
 - Transportation
 - Business Cards
 - Expenditure process
- VISTA
 - Completes Early Service Coursework from the VISTA Campus, which include:
 1. [Make the Most of Your Onsite Orientation and Training](#) (1 - 2 hours) – This checklist will help you get acclimated to your organization and your project.

2. [Learn about Theory of Change](#) (10 minutes) – Learn more about the theory behind the anti-poverty work you will be doing.
 3. [Introducing Yourself and Your Organization: The Minute Intro](#) (1 hour) – Create a short and impactful introduction to help you connect with the community you will be serving and your project stakeholders.
 4. [How Poverty is Measured in the United States](#) (5 minutes) – This course helps spur your thinking on this complex issue.
 5. [VISTA Assignment Description \(VAD\) Worksheet](#) (1 hour) – This worksheet will help you understand your role in helping to address poverty in your community.
 6. [Creating a Community Profile](#) (1 - 2 hours) – Completing this profile will help you understand the makeup of your community as well as the particular challenges people navigating poverty face.
 7. [Thirteen Lessons About Poverty](#) (1 - 2 hours) – Explore lessons about poverty learned during the first 50 years of the VISTA program, in this compelling explanation by Dr. Stephen Pimpare, author of *A People's History of Poverty in America*.
- IT & New Employee Set Up
 - Frequently used software training and best practices
 - VISTA added to all relevant electronic lists/calendar invites
 - Program & Content Orientation
 - One-on-one meeting with site supervisor to answer questions from VMO
 - Shadow Director/Support staff to gain better understanding of program
 - Organization website review
 - Organizational chart
 - List of board members and bios
 - Sample grants and/or common grant language
 - Board meeting committee descriptions (to gain understanding of the board's relationship and role with the program)
 - Outline of program goals and policies
 - Organization Resource Library

IV. First Two Months

- Meet with Stakeholders - Director/VISTA will schedule time to have introductory and information gathering meetings with:
 - [INSERT STAKEHOLDER HERE]
 - [INSERT STAKEHOLDERS HERE]

- Board Chair/members (as applicable)
- Important staff for which the VISTA will interact with most often
- Important community members the VISTA will build relationships with
- Community Tour – Take the VISTA, or recruit someone to take him/her, on a tour (a walking tour can be powerful) of the communities. Point out important landmarks, community resources, homes, etc.
 - Questions to answer/address:
 - Who runs the community?
 - How do decisions get made?
 - What are the key partnerships and who are the contacts for each?
 - What has worked and not worked?
- Review Strategic Plan, if applicable
- Gain a deep understanding of project
 - Its history
 - Its mission
- [INSERT ASSIGNMENT SPECIFIC TASKS] Examples:
 - Research best practices in volunteer management and recognition
 - Research best practices in alumni engagement
 - Identify gaps in database and begin to develop plan to address gaps
 - Attend grant writing training
- Field Trips – Assign VISTA field trips with strategic tasks the VISTA member needs to complete that will help his/her understand nuances of the program, our families, the community
- VISTA participates in Professional Development trainings (webinars, conferences, etc.)
- VISTA keeps a “Fresh Eye” Notebook to list questions and jot down observations
- Conduct meetings weekly with supervisor to discuss observations, questions and review the VAD

OSOT Design – Example 2

AmeriCorps VISTA On-Site Orientation United Way of XYZ County

Week 1

Day 1 - Wednesday July 5th

8:30 AM – 9:00 AM	Welcome and Housekeeping Rules
9:00 AM – 9:30 AM	Official Welcome - President and CEO United Way
9:30 AM – 10:30 AM	United Way AmeriCorps VISTA Project VISTA Evolution
10:30 AM – 11:00 AM	Professionalism and Office Expectations
11:00 AM – 11:45 AM	United Way VISTA Reference Booklet (Pt. 1)
11:45 AM – 1:00 PM	Lunch
1:00 PM – 1:15 PM	Building and Office Tour
1:15 PM – 1:45 PM	United Way VISTA Reference Booklet (Pt. 2)
1:45 PM – 2:45 PM	Bold Goals Presentation - VP Community Impact
2:45 PM – 3:00 PM	Break
3:00 PM – 4:30 PM	“Launching Your VISTA Service” webinar & swearing-in

Day 2 - Thursday July 6th

Focus: External Engagement

8:00 AM – 9:00 AM	United Way VISTA Reference Booklet (Pt. 3)
9:00 AM – 9:45 AM	Elements that Make for a Successful Year – Exercise
9:45 AM – 11:00 AM	Complete Make the Most of Your Onsite Orientation and Training (Early Service coursework from VISTA Campus)
11:00 AM – 11:15 AM	Break and prepare for group transition
11:15 AM - 12:00 PM	iC.A.R.E. VISTAs APS Technical Preparations
12:00 PM – 1:00 PM	Lunch and Background Checks
1:00 PM – 1:30 PM	Engagement Calendar
1:30 PM – 2:00 PM	Affinity Group and Volunteers - Director Corporate Engagement and Manager Corporate Engagement
2:00 PM – 3:00 PM	VP Corporate Engagement
3:00 PM – 3:30 PM	Marketing and Brand Management –VP Marketing
3:30 PM – 4:00 PM	Community Impact and Organizational Charts
4:00 PM – 4:30 PM	Office 365 Demo – Manager, IT

Day 3 - Friday July 7th

Focus: XYZ County & Beyond

8:30 AM – 8:45 AM	Day Overview and Agenda
8:45 AM – 9:30 AM	Policy and Strategic Affairs – VP, Strategic Affairs
9:30 AM – 10:30 AM	United Way World Wide and Major Gifts – Director, Major Gifts
10:30 AM – 10:40 AM	Break
10:40 AM – 12:00 PM	Plan Your Professional Development Webinar
12:00 PM – 1:30 PM	Lunch
1:30 PM – 2:00 PM	Travel to Site
2:00 PM – 3:00 PM	Financial Planning for a Year of Service
3:00 PM – 4:00 PM	Team Building Activity
4:00 PM – 4:30 PM	Circling Back to a Successful VISTA Year and Closing Remarks

Week 2

Monday

- Mentoring – Value, individual perceptions, what it is/isn't
- Complete [Learn about Theory of Change](#) (Early Service Coursework from VISTA Campus)
- Complete [Introducing Yourself and Your Organization: The Minute Intro](#) (Early Service Coursework from VISTA Campus)
- Introduction to iC.A.R.E. Luncheon (11:30am – 1pm) – History of program - Vision/Mission/Scope of program
 - Steering committee members will share about program history and inaugural roles
- Weekly Huddle/meet existing VISTA (2 – 2:45pm)

Tuesday

- Teamwork building exercise (8am – 9:45am) – Current VISTA will facilitate
- Communication Dept. Meeting (10am – 11:30am)
- Lunch (11:30am – 12:30pm)
- Intro to the iC.A.R.E. Program (1pm – 3pm)
- Focus Group VISTA tasks meeting (3pm – 4pm)

Wednesday

- Complete [VISTA Assignment Description \(VAD\) Worksheet](#) (Early Service Coursework from VISTA Campus)
- Focus Groups (11am – 4:30pm)

Thursday

- The i.C.A.R.E. Mentoring way – Service mentality (8am – 2pm, with lunch included)
 - Location: XYZ County Community Partnership; guest speaker.
 - Service project

Friday

- Complete [How Poverty is Measured in the United States](#) (Early Service Coursework from VISTA Campus)
- Complete [Thirteen Lessons About Poverty](#) (Early Service Coursework from VISTA Campus)
- Trolley ride and tour of city & community agencies (12pm – 4:30pm)

Week 3

Monday

- Program Plans/Scoreboards
- Weekly huddle
- Complete [Creating a Community Profile](#) (Early Service Coursework from VISTA Campus)

Tuesday

- UWSC Staff meeting (9am – 10am)
- i.C.A.R.E. Database/SharePoint/eSchool training
- Scenarios and assignments to practice using the software and databases
- Systems and Processes (Activation – Matching – Mentoring) – how it works
- Summer program observations (evening 6:30pm – 9pm)

Wednesday

- Bridges Training
- Summer program observations (evening 5pm – 8pm)

Thursday

- Professionalism/Teamwork
- VAD's (Roles & Responsibilities)
- Systems and processes/Bold Goals –group activity and facilitation

Friday

- Debrief of Early Service Coursework from the VISTA Campus (9am-10:30am)
- CRM Training

Week 4

Monday

- Valuing strengths & appreciating differences training (8:30am – 10:30am)
- Previous week's recap and question and answer session

- Recap database scenarios (practicing using the software – A.I. Video on practice)
- Weekly Huddle

Tuesday

- Family Engagement – Akron Public Schools perspective (10:30am – 11:30 am)

Wednesday

- School calendar, closures, in-service, holidays, spring breaks, etc.
- Chain of command (PTO/Schedules)
- Mileage reimbursements/Time Sheets

Thursday

- Scoreboard development

Friday

- Community Scavenger Hunt

Week 5

Monday

- Strategic Planning session (8am – 12pm) Use Project Charter model from PMI
- Lunch
- Extended Weekly Huddle (2pm – 4:30pm)

Tuesday

- Summer program evaluation and assessment (A.M.)
- Database cleanup & Updates (P.M.)

Wednesday

- Passing the baton/project completion presentation – interface old with new (Q&A)

Thursday

- VAD Review with Timeline emphasis and evaluation of work (8am– 10:30am)
- Office Resources/Organization
- UWSC All-Staff meeting (2-4:30pm)

Friday

- School integration & alignment - becoming part of the APS family (9am -11am)
- Hold for VISTA celebration event

Week 6

Monday

- Presentations/public speaking (practicing trainings and public speaking – informational, initial visits, training sessions, etc.)
- Weekly Huddle (2pm – 3pm)

Tuesday - Wednesday

- Smaller individual presentations to 1 person scenarios (1ST half of day practice, 2nd half of day present and record)

Wednesday

- Summer project assessments (prep for printing) (individual work with assistance)

Thursday – Friday

- Global Leadership Summit

Week 7

- Satisfaction Survey/Focus group (World Café) evaluations
- Project Management
- Get on school calendars for presentations
- Steering committee meeting (Wednesday, 8am)
- Knight Breakfast (Thursday, 8am)
- Strengths Finder facilitation of results (Thursday, time to be confirmed)
- Teambuilding – Escape Room (Thursday, 3-4:30 pm to be confirmed)
- Summit for Kids (Saturday, 9AM – 3PM)
- Community mentor training sessions and observations – (confirm dates and locations)
- Mentor, parent, steering committee partner speakers (schedule and confirm)

Week 8

- Implementation
- Stuff the bus - All staff meeting (Tuesday, 11am)
- Sort-a-thon (Wednesday, 8am – 1:30pm)
- Valuing strengths & appreciating differences Training (Thursday, 9am-11 am)

Week 9

- Game time – implementation
 - Identify school contacts and space for upcoming start of program (mentor/mentee sessions)

AmeriCorps VISTA

On-Site Orientation & Training Plan Template

VISTA sponsors complete this plan and submit it to the CNCS State Office at least 30 days prior to the VISTA member's start date.

VISTA PROJECT NAME:

DATE OF PLAN:

A Microsoft Word version of this OSOT Plan Template is available on the VISTA Campus.

WEEK ONE

Day 1: [Title/Training Theme]

Morning:

- 1.
- 2.
- 3.
- 4.

Afternoon:

- 1.
- 2.
3. Launching Your VISTA Service webinar (required)

Day 2: [Title/Training Theme]

Morning:

- 1.
- 2.
- 3.
- 4.

Afternoon:

- 1.
- 2.
- 3.
- 4.

Day 3: [Title/Training Theme]

Morning:

- 1.
- 2.
- 3.
- 4.

Afternoon:

- 1.
- 2.
- 3.
- 4.

Day 4: [Title/Training Theme]

Morning:

- 1.
- 2.
- 3.
- 4.

Afternoon:

- 1.
- 2.
- 3.
- 4.

Day 5: [Title/Training Theme]

Morning:

- 1.
- 2.
- 3.
- 4.

Afternoon:

- 1.

- 2.
- 3.
- 4.

WEEK TWO

Day 1: [Title/Training Theme]

Morning:

- 1.
- 2.
- 3.
- 4.

Afternoon:

- 1.
- 2.
- 3.
- 4.

Day 2: [Title/Training Theme]

Morning:

- 1.
- 2.
- 3.
- 4.

Afternoon:

- 1.
- 2.
- 3.
- 4.

Day 3: [Title/Training Theme]

Morning:

- 1.

2.

3.

4.

Afternoon:

1.

2.

3.

4.

Day 4: [Title/Training Theme]

Morning:

1.

2.

3.

4.

Afternoon:

1.

2.

3.

4.

Day 5: [Title/Training Theme]

Morning:

1.

2.

3.

4.

Afternoon:

1.

2.

3.

4.

WEEK THREE

Day 1: [Title/Training Theme]

- 1.
- 2.
- 3.
- 4.

Day 2: [Title/Training Theme]

- 1.
- 2.
- 3.
- 4.

Day 3: [Title/Training Theme]

- 1.
- 2.
- 3.
- 4.

Day 4: [Title/Training Theme]

- 1.
- 2.
- 3.
- 4.

Day 5: [Title/Training Theme]

- 1.
- 2.
- 3.
- 4.

WEEK FOUR

Day 1: [Title/Training Theme]

- 1.
- 2.
- 3.
- 4.

Day 2: [Title/Training Theme]

- 1.
- 2.
- 3.
- 4.

Day 3: [Title/Training Theme]

- 1.
- 2.
- 3.
- 4.

Day 4: [Title/Training Theme]

- 1.
- 2.
- 3.
- 4.

Day 5: [Title/Training Theme]

- 1.
- 2.
- 3.
- 4.