SHIP
State Health Insurance Assistance Program

Navigating Medicare

SHIP Volunteer Program Management Manual

State Health Insurance Assistance Program

National Technical Assistance Center

SHIP Volunteer Program Management Manual

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Acknowledgments

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Special thanks go to the Virginia SMP, whose website graphic is on Page 21.

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SHIP
State Health Insurance Assistance Program

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Purpose

This manual is intended to support SHIP personnel responsible in any way for SHIP volunteer program management and particularly for those responsible for the specific tasks involved in being an effective coordinator of volunteers. Coordinators of volunteers may have a variety of actual job titles, but this term is used to describe the role of the person or persons responsible for the following types of SHIP volunteer program management tasks: overall volunteer program management, recruitment, placement, training, supervision, recognition, and more.

New coordinators of volunteers may benefit from reading the entire manual cover-to-cover in the order it is written, whereas more experienced coordinators of volunteers may prefer to focus directly on specific content areas, with the aid of the Table of Contents and Index. SHIP directors may also find this manual useful. Volunteer Program Management requires a team effort and SHIP directors may need to assist and support the staff or partners who perform the role of coordinator of volunteers.

Additional Resources

Other SHIP volunteer program management tools are available to SHIP staff in the SHIP Resource Library at www.shiphelp.org (password-protected). Many are based upon materials created for the Senior Medicare Patrol projects, then edited for SHIPs. Examples include sample volunteer management forms, checklists, procedures, role descriptions, and other templates. An electronic copy of this manual is also housed there.

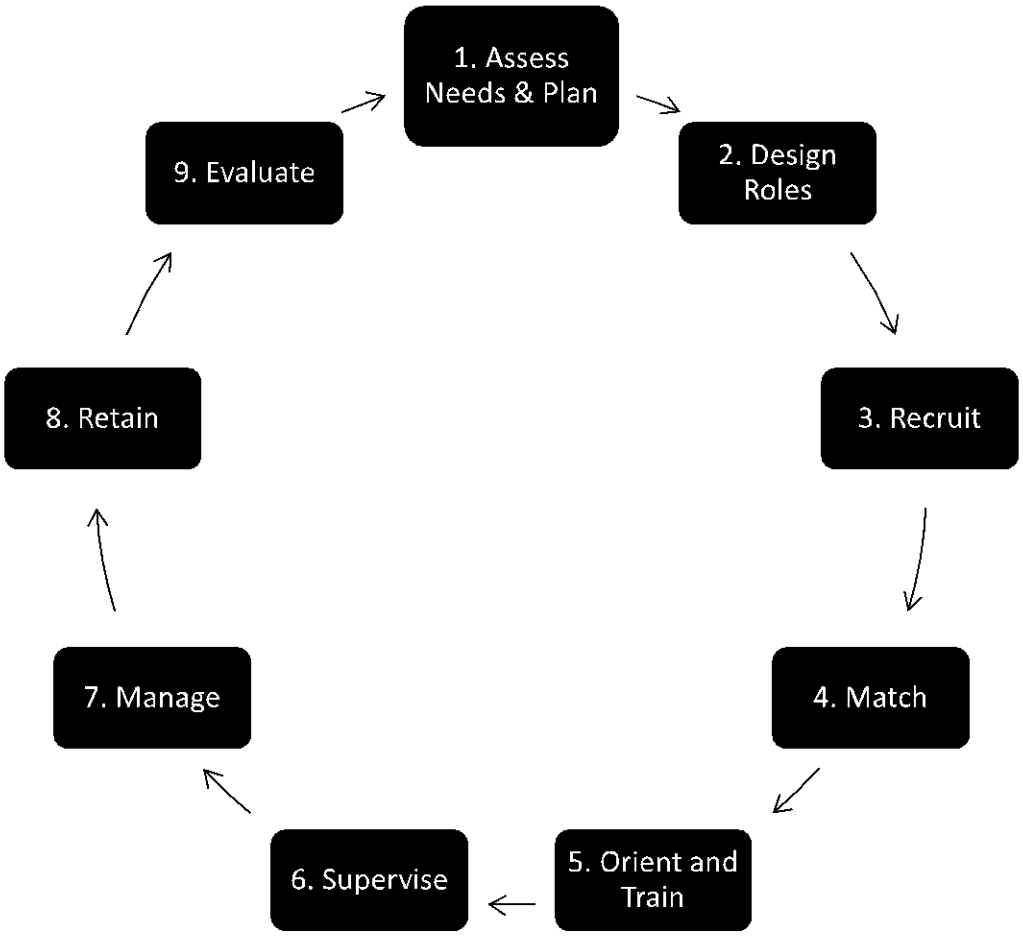
Periodic webinar training about volunteer program management is also provided by the SHIP National Technical Assistance Center and then archived in the password-protected "SHIP Login" at www.shiphelp.org. For assistance with accessing volunteer program management materials and training, contact the Center at info@shiptacenter.org or 877-839-2675.

Chapter 1: The Volunteer Involvement Cycle

Volunteer Involvement Cycle

Central to the successful volunteer program management practices recommended in this manual is the awareness of a continuum of volunteer engagement activities, which we will call "The Volunteer Involvement Cycle." The volunteer involvement cycle is a multi-step process, starting with a needs assessment and proceeding clockwise through the additional processes, as shown below. The entire process is repeated as needed throughout the life of the volunteer program.

The specific practices associated with these steps are illustrated in the following chapters. The diagram below depicts the main activities involved in this cycle and also their suggested order, though some activities may occur simultaneously: for example, assessing needs and planning may occur while you are also involved in day to day management or training.



How Volunteers Add Value

Volunteers add value to any program they serve in a number of ways. Below are just a few important examples:

- **Volunteers allow programs reach and serve a wider population.**

  In these days of increasing budgetary restrictions, the hours of service given by volunteers are an invaluable resource. Volunteers allow programs to serve a wider audience, reaching out across states and communities to those who might not otherwise be served, due to limits on program resources.

- **Volunteers allow programs to serve more diverse audiences.**

  Programs that involve volunteers who represent a cross section of their communities are better able to form peer-to-peer relationships and gain the trust of the audiences the program wishes to serve. The relationships volunteers are able to develop can assist programs in better reaching targeted populations or reaching populations that are harder to reach.

- **Volunteers can also bring a wide range of skills to your program.**

  These include skills that may not be possessed by paid staff or skills of a technical nature that are only needed periodically by your program.

Chapter 2: Building Effective Volunteer Involvement

The Theory Behind Volunteer Management

Effective volunteer management is simple in theory but subtle in operation. It has all the complexities of basic personnel management – role development, interviewing, supervision, evaluation of performance, recognition and reward, and so on. It also has complexities all its own. An interesting example, not seen as often in the environment of paid staff, is that of the over-enthusiastic worker. Quite often, a coordinator of volunteers will have to deal with a volunteer who causes difficulties for the program not from a lack of motivation but from a surplus of it. This volunteer will be so dedicated to the cause that she will expect and work for instant solutions to any problem that arises and will not understand why the system sometimes operates so slowly. The volunteer may become impatient and infuriated with anyone, paid staff or volunteer, who doesn't give total dedication to making the system work perfectly, and immediately.

Volunteer involvement depends upon creating a good system for working with volunteers. A program that has insufficient infrastructure, inadequate staff and leadership support, insufficient budgeting, or other defects in management will fail to attract and keep volunteers. A 2003 study in Australia found that volunteers with the Australian Threatened Bird Network preferred projects where organizers set clear goals, provided feedback, and supervised in a friendly and helpful manner – all basic elements of competent management. These are the same elements cherished by paid staff. Much of volunteer management reflects precisely the same techniques used in working with and motivating paid staff.

"A program that has insufficient infrastructure, inadequate staff and leadership support, insufficient budgeting, or other defects in management will fail to attract and keep volunteers."

The theory behind volunteer management is quite simple. Like all organizational efforts, volunteers require care, commitment, and attention.

The Role of the Coordinator of Volunteers

Organizations that involve volunteers most effectively do so as part of a coordinated volunteer program. This systematic approach to volunteer involvement requires a manager: someone to find people who want to help and match these people to the needs of the SHIP. This person plans and coordinates all the activities of the volunteer management process.

An Urban Institute study found:

> *The percentage of time a paid staff volunteer coordinator devotes to volunteer management is positively related to the capacity of organizations to take on additional volunteers. The best prepared and most effective volunteer programs are those with paid staff members who dedicate a substantial portion of their time to management of volunteers. This study demonstrated that, as staff time spent on volunteer management increased, adoption of volunteer management practices increased as well. Moreover, investments in volunteer management and benefits derived from volunteers feed on each other, with investments bringing benefits and these benefits justify greater investments.*

This does not mean that the coordinator of volunteers – sometimes called the "volunteer coordinator" or "director of volunteers" – supervises all of the volunteers directly, although she or he may do so in a small program where volunteers work in a "standalone" effort. In larger programs, volunteers may be supervised by staff of partner agencies or by other SHIP staff who take responsibility for geographic areas within the state. In many SHIP programs, some aspects of volunteer management – such as training volunteers – are the responsibility of staff with expertise in that area.

In a large, sophisticated operation, the effective coordinator of volunteers plays a critical role in the success of the entire organization. When new projects or new directions arise, the role of volunteers is planned into them from the beginning. The coordinator of volunteers helps top management identify needed expertise that will help the project succeed and works with paid staff to design volunteer roles to meet those needs. She or he plans and coordinates a recruitment effort to identify people who will find such work fulfilling enough to devote their leisure time to doing it; assists in the screening, interviewing, and selection processes; provides an overall orientation to the organization; evaluates the success of the volunteer program; and plans recognition events.

Most importantly the coordinator of volunteers maintains an overall view of how the SHIP is doing at involving volunteers, both through evaluating current efforts and planning for the future.

Options in Structuring the Coordinator of Volunteers Role

As a coordinator of volunteers, you will perform a variety of functions for your SHIP, and it is important to have a clear understanding of what is expected of you in your role. Specific expectations may be determined by your SHIP project director and/or other management in your state. If, however, you were not provided with a detailed role description, a sample role description for a typical coordinator of volunteers is available on the SHIP National Technical Assistance Center website.

While having a designated coordinator of volunteers is the recommended configuration for a SHIP, it is not the only possibility. For example:

1. Some SHIPs assign the role functions among staff, having some staff focus on screening prospective volunteers, others managing training, and others undertaking day-to-day supervision of SHIP volunteers.
2. Some SHIPs have created geographic assignments in which individuals handle volunteer management as part of their work within a particular area of the state.
3. Some SHIPs subcontract with partner agencies, whose staff perform the role of coordinator of volunteers.

"Having a designated coordinator of volunteers is the recommended configuration for a SHIP, though it is not the only possibility."

If your SHIP utilizes these alternatives, it is recommended that a SHIP staff person be designated as "lead" and given responsibility for coordinating efforts. This will make it more likely that the volunteer system is operated in a consistent fashion.

Working with Staff and SHIP Leadership

Most coordinators of volunteers assume that their primary role is working with volunteers. While in one sense this is true, in another it ignores another equally important role: to ensure that the SHIP has an effective system for involving volunteers.

Accomplishing this means that the SHIP staff, SHIP leadership, and any partner organizations have both the desire and the capability to effectively support volunteer involvement. Two tasks are required of the coordinator of volunteers to achieve this objective:

1. The first is ensuring that SHIP leadership has the information it needs to make informed decisions about supporting the volunteer effort. This primarily includes evaluative information about what volunteers are doing and how well they are doing it. It also, however, includes information about shortcomings in the volunteer involvement system and what will be required to alleviate them. You may discover areas in which your SHIP has been underperforming in volunteer management. Part of your responsibility will be to map a path for improvement.
2. The second task is ensuring that staff who work with volunteers are capable of doing so effectively. This applies whether they are SHIP staff or staff of partner organizations that manage volunteers. You may discover that many of these staff have no experience in working directly with volunteers. You may need to provide training to show them what needs to be done.

As a rough rule of thumb, an effective coordinator of volunteers may spend about 60 percent of the time focusing on volunteers and about 40 percent focusing on improving staff capacity.

Key Points: The Role of the CoV

- The role of the coordinator of volunteers is to ensure that the SHIP has an effective system for involving volunteers.
- You may discover areas in which your SHIP has been underperforming in volunteer management. Part of your responsibility will be to map a path for improvement.
- An effective coordinator of volunteers may spend about 60 percent of the time focusing on volunteers and about 40 percent focusing on improving staff capacity.

Chapter 3: Creating Roles for Volunteers

The Theory Behind Roles for Volunteers

The single most important factor in managing an effective volunteer program is the design of volunteer roles. Designing volunteer roles is so important that it should be done before recruiting takes place. Creating roles before recruiting is essential because the roles identify the skills required to effectively perform the work needed by the SHIP. Recruitment then becomes a process of locating individuals in the community who can provide these skills. An organization that has interesting and productive roles to offer will have an easy time attracting and keeping volunteers. Too many organizations, instead, provide unsatisfactory work experiences and then have an impossible time retaining volunteers. In such cases, staff may regard volunteers as unreliable. The problem of poorly designed volunteer work is seldom diagnosed.

While in the short run most volunteers will agree to do anything that needs doing, in the long run most volunteers will prefer to do work they find satisfying. This means both work that appeals to them (i.e., that they find interesting to perform) and work that has meaning (i.e., that helps accomplish the mission of the organization where they volunteer).

All in all, the opportunity to do "good work" is not just one of the basic building blocks of the volunteer program – it is *the* key element.

Attracting and Keeping Great Volunteers

"While in the short run most volunteers will agree to do anything that needs doing, in the long run most volunteers will prefer to do work they find satisfying…The opportunity to do 'good work' … is *the* key element."

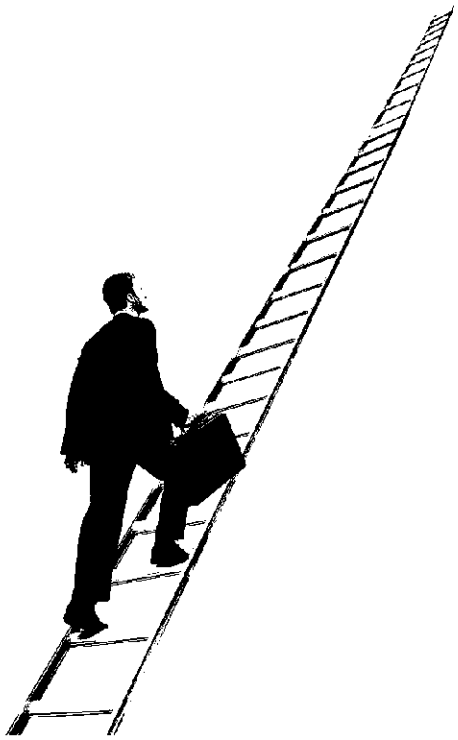
A recent study by the Taproot Foundation found that:

> *Focus group and interview responses were strongly consistent around the desire for clearly defined volunteer opportunities. Specifically, respondents wanted clear expectations for both the nonprofit and the volunteer regarding defined roles and tasks, clear outcome goals, clear timelines and time commitment, and a clear understanding of the expected value and implementation of the activity. Common comments included sentiments like: "without thoughtful structure there is always frustration; it's frustrating for me as a volunteer to know I'm not being as useful as I know I can be, and frustrating for the nonprofit who is wasting time spinning wheels around managing us."*

Adjusting Volunteer Roles to Meet Volunteer Needs and Preferences

A prospective volunteer will often be interested in a number of the available SHIP volunteer roles. Part of recruitment is determining which role or mix of roles best fit a particular volunteer, then crafting an individualized volunteer role description.

As the interviewer attempts to match the role to the needs and interests of potential volunteers, some negotiation may take place. Further negotiation should take place after the volunteer has been accepted and has begun work. As the volunteer gains more familiarity with the actual work to be done, he or she may make suggestions as to how the role might be modified to make it even more rewarding. These suggestions, however, should not detract from the basic requirements of the SHIP for program quality.



Volunteers who work through local partner agencies – sometimes called "volunteer host organizations" (VHOs) – may in reality have volunteer roles that go beyond what they do for the SHIP. For example, some SHIP volunteers also work as Senior Medicare Patrol (SMP) volunteers, VITA (Volunteers in Tax Assistance) volunteers, or Area Agency on Aging (AAA) volunteers. There is no simple way of eliminating this overlap, so focus on ensuring that the volunteer at least has the SHIP part of his or her role clearly delineated.

The role description becomes the primary instrument for guiding volunteers. It provides them with a clear outline of what they are expected to do and should be updated to include any significant changes in responsibility.

Some volunteers may want to start with a simple role but over time will add more complicated roles as they become more confident. Fostering this "growth" is an excellent way to build volunteer retention.

Chapter 4: Recruiting New Volunteers

The Theory Behind Volunteer Recruitment

Put simply, the theory is this:

Effective recruiting consists of attracting just enough of the right volunteers.

This distinction is an important one, with significant implications for a coordinator of volunteers. Inexperienced coordinators of volunteers often think that it is desirable to have large numbers of potential volunteers seeking work with the program. Unfortunately, in practice a surplus of volunteers can cause difficulties. If you advertise for volunteers and have only room for two, what do you do if twenty show up? Initially, you must expend significant time in the screening and interviewing process, determining which of the volunteers should be accepted. Then you must "reject" most of the volunteers, risking the prospect of their becoming resentful. The only thing worse than having to reject these volunteers is accepting their service when you don't really have work for them to do, at which point they will become convinced that both you and the organization are incompetent.

Recruitment is the process of enlisting volunteers into the work of the SHIP. Because volunteers give their time only if they are motivated to do so, recruitment is not a process of persuading people to do something they don't want to do. Rather, recruitment should be seen as the process of showing people they can do something they already want to do.

Conceptually, volunteer recruitment involves two tasks, each of which complements the other:

1. Getting the message out about volunteering.
2. Showing potential volunteers a reason to say "yes"

The recruitment process might also be pictured as a "filter." It is the procedure of identifying and separating from the entire universe of potential volunteers (the whole population of your community) those persons who best might fit the needs of the SHIP and its work and of separating out those who do not.

Recruitment, then, becomes a matter of proportion – balancing the need for applicants with the work required in separating the qualified from the unqualified.

"Effective recruiting consists of attracting just enough of the right volunteers."

Getting the Message Out

There are dozens of ways to disseminate volunteer recruitment messages. All of them work, but some are easier and cheaper than others. In most cases, SHIP programs can use straightforward and fairly simple recruitment techniques. These include:

- Word of mouth
- Newspaper articles
- Online volunteer matching sites
- Organizational website
- Presentations to community groups
- Partner organizations

Following are some suggestions for each of these techniques.

Word of Mouth

1. Word of mouth is essentially a friend-to-friend communication process that relies on the credibility of those delivering the message – we tend to believe information that we get from those we trust. Most volunteers are currently recruited through this word-of-mouth process, particularly through active volunteers speaking on behalf of what they do.
2. Word of mouth only works when the volunteer effort is supported by current volunteers who will speak honestly about both its strengths and weaknesses. Good volunteer management is required to build and sustain this support.
3. Word of mouth can be fostered through encouraging volunteers, staff, and partner organizations to talk with others about the SHIP program and its value. You can help this by ensuring that everyone understands both the value of advocating for volunteering with the SHIP and how to help interested prospective volunteers to connect with the SHIP.
4. Word of mouth can also be facilitated by ensuring that everyone who comes in contact with the SHIP, including program beneficiaries, receives information about becoming a volunteer. Each of those who have received help from the SHIP can also effectively speak on its behalf and act as a natural recruiter.

5. Word of mouth is an essential method of communication when seeking volunteers who do not rely on technology as a primary method of communication.

Newspaper Articles

1. Newspapers are a cheap and effective way of broadening the audience for volunteer recruitment, especially in smaller communities where they are a primary source of local news and information. In addition to any daily local newspaper, think about specialty papers such as a senior-orientated newspaper (often distributed by a local Area Agency on Aging).
2. The best way to generate a newspaper article is to establish and maintain a relationship with reporters and editors responsible for local feature articles. You can identify them by reading the bylines in your local paper or finding staff information online and then calling them. Do not be reluctant to do this. Because these professionals rely on contacts from people such as you to help them find worthy stories, you are actually helping them do their work.
3. The primary element of interest to the features reporter is having a story to tell. This story can be built around an interesting or important type of work being done or about the individuals involved - either the volunteer or the program beneficiary. You can help reporters make this decision by having information about what the SHIP is doing locally and about some of the individuals involved in this work. The reporter will usually want to contact these individuals to talk to them, and will often structure the entire story around a particular volunteer.

4. Do not try to write your own story and offer it to the reporter. Instead, try to help her find a good story and then ask that she include information that shows others in the community how to get involved.
5. Most newspapers now have print and online editions; ask about both.

Online Volunteer Matching Sites

1. An ever-increasing number of online volunteer matching sites are being created. We suggest you focus on one or two, since this will allow the time to keep your postings current. The most successful national online site is www.VolunteerMatch.org. A good local site that may be available in your community is Craig's List.

Recruitment postings on volunteer matching sites are only as effective as the information that is provided. Most postings focus on a particular type of volunteer role, asking you to describe the nature and scope of the work to be done as well as information about role requirements. Look for examples of effective postings that you can model your own effort after and be careful not to model after an ineffective posting. Generally, you will need to write one posting for each type of volunteer role.

2. By following the behavior of those who use online matching sites, you can get a good feel for what potential volunteers are looking for. Key information to provide in the posting includes: organizational background (what you do and why it needs to be done), description of the volunteer work to be done (what it is, how long is required, where it will be done), and contact information (name of contact, email, or phone). It is also critical to provide a link to the SHIP website because most viewers of posts immediately use this to obtain further information.

3. One careless mistake in the use of online matching sites is to have a "dead" post. This is a volunteer role that has expired or that has been listed so long that is probably no longer current. Keep your postings current.
4. A not-so-obvious requirement for online matching sites, but one that is increasingly critical, is responding to inquiries on a consistently speedy basis. Those who use online matching sites have a very low threshold of patience and tend to interpret a delay in returning contact as a sign that you're not all that interested in developing a relationship. A 24-hour response rule would be a very good idea.

The SHIP's Organizational Website

1. As indicated above, many who use online matching sites immediately look for further information via an organizational website. These sites, however, can also serve as an information mechanism for all other types of information dissemination, giving the prospective volunteer a central point to learn more before making a decision. Add the URL to presentations and printed recruitment materials.

2. The main SHIP page of the organizational site will commonly contain general program information about what the SHIP is and does. It should also include a clear and obvious link to information about volunteering. One simple and obvious way would be to provide this link is through a button asking "Interested in volunteering?" that connects to a page focusing on the volunteer program.

3. The volunteering page of the website should contain basic recruitment information: what volunteers do for the SHIP, why this is important, how readers can become involved, what the range of volunteering options is, etcetera. One way to communicate this effectively is to tell the story of one or more current SHIP volunteers: describing what they do and using their own words to vouch for becoming a volunteer. Use pictures and video if you can.

4. Consider making the site interactive. Options include an email link for questions, a downloadable volunteer information packet or application form, an FAQ that addresses frequently asked questions about volunteering, or even an online application form that can be completed immediately.

5. Facebook and other social networking sites often complement a SHIP's website. The effectiveness of these in volunteer recruitment has yet to be determined, although there is likely some value to be obtained. What has been determined is that these approaches are labor intensive and difficult to control.

6. As with online matching sites, a key rule of the organizational website is to respond to inquiries consistently and rapidly. A less-obvious requirement is to make sure someone monitors the site if the person normally in charge of monitoring it is on vacation.

Presentations to Community Groups

1. Deliberately select those groups to which you wish to speak. Two types are most helpful: those groups whose membership regularly participates in helping out in the community (Rotary, service clubs, etc.) and those groups whose members are likely to have a common interest with your cause, such as AARP, retiree groups, and senior centers. Schedule these types of groups first.

2. In seeking an opportunity to speak to the group, consider going through a group member. The member can serve as your endorsement to his/her peer group, paving your way to a more receptive audience. An easy way to find potential groups is to ask current SHIP volunteers whether they belong to any club or group that might be interested in hearing about the SHIP program.

3. Pick your presenter carefully. Make sure the speaker can explain what the SHIP does and exactly what is needed from volunteers. Consider sending a volunteer who can speak forcefully about the worth of the volunteer position. Sometimes a volunteer can more easily and more enthusiastically recruit than a paid staff member.

4. If possible, use a visual presentation (slides, PowerPoint, etc.) to increase interest. If your presentation is boring, the group may assume that volunteering with you will be, too. Use stories and examples to get your point across. The easiest "story" is simply one that describes a volunteer and what she or he does. If you have the opportunity, you might have a SHIP volunteer come along with you and tell her story.

5. Be prepared for people to offer their services. Take along brochures, examples of roles for which they are needed, sign-up sheets, etcetera. If people express interest, don't leave without their names and phone numbers, and commit yourself to following up quickly.

6. Remember that at some point during your presentation you should directly and unequivocally ask the audience to volunteer. Very few people will volunteer for your program without being invited to do so.

Partner Organizations

1. Partner organizations provide an excellent opportunity for reaching a new audience and for piggybacking on the partner's credibility and relationship with its audience. Most partners will view helping you spread information about the SHIP as a natural part of their relationship with the SHIP and will be interested in working with you.

2. Ask partners what mechanisms they use for communicating with their primary audience (which could be members, beneficiaries, residents, community segments, etc.) Select those that provide an opportunity for outside stories and announcements. Work with the leader to develop the final article. Unlike newspapers, be prepared to draft your own article to facilitate things. The partner will be more interested if your message provides a direct connection to their readership, showing how it interests or benefits them.

3. Be prepared to work within the logistical limitations of the partner, including the format and length of any communication and timing requirements – especially the length of time between when a message is developed and when it actually goes out.

4. In many states, AARP has proven to be an effective partner in relaying SHIP messages. All states and even some localities have their own newsletters. If you have a SHIP volunteer who is also an AARP member, consider making them the lead story.

5. Another way to expand partner involvement is asking them to provide a link on their website to the SHIP website.

A SHIP program might use one or several of these methods to disseminate recruitment messages, depending upon what is available locally, what contacts the SHIP has in the community, and how much effort needs to be expended to find volunteers.

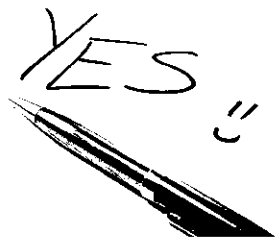
Showing Potential Volunteers a Reason to Say "Yes"

Recruiting volunteers is not so much about persuading those who are reluctant as it is providing the prospective volunteer with sufficient information to make an informed decision about whether volunteering would be a good idea for him or her.

Typically, prospective volunteers are interested in hearing the following type of information in a recruitment appeal:

1. Why should this work be done at all?
    - What is this work about?
    - What is the need in the community for this work?
    - What bad things will happen if this work is not done?
2. What benefits will the community or the clientele receive if the work is done?
    - What will the work accomplish?
    - What changes will it make in people's lives?
    - How does what you are asking me to do make a difference?
3. What possible fears or objections concerning this work must be overcome?
    - The type of clients?
    - The credibility of the asking organization?
    - The skills needed to do the work?
    - Geography?
4. What personal benefits will the volunteer doing the work receive?
    - Skills?
    - Experience?
    - Flexible work schedule?
    - New friends?

The appeal can then focus on communicating to the potential volunteer why the SHIP and its work are important and why the potential volunteer should contribute to the accomplishment of that work. Different aspects of this message may be stressed more than others or may be communicated differently in different recruitment media.



Every volunteer recruiter should develop an "elevator speech" communicating the value of volunteering for the SHIP. All information should be accurate (i.e., make no promises that you are not going to keep) and should be believed by the person delivering the message.

Positive messages about the benefits of volunteering tend to be more effective than negative messages or scare tactics. A study by Volunteer Development Scotland found that:

> *Messages that convey that the organization is desperate for volunteers were rejected outright as they are seen as emotional blackmail and reinforced non-volunteers' fears of never being able to get out of the volunteering.*

Providing a Responsive Recruitment Process

In some ways, volunteer involvement resembles any customer service relationship. Those volunteers who feel they receive good service are likely to continue with the agency; those who do not feel like a good relationship has been established are likely to leave. This relationship is most fragile in its early stages and is particularly fragile when the prospective volunteer is in first contact with the organization, inquiring about the possibility of volunteering.

Most agencies pay far too little attention to making this process operate smoothly. Hobson and Malec in a study of 500 United Way-affiliated agencies in the Midwest examined the experiences of prospective volunteers who phoned attempting to initiate volunteering:

- Only 49.3 percent received an offer of assistance ("May I help you?")
- 69.3 percent did not receive the name of the staff person answering the phone
- 26.4 percent were not referred to the appropriate agency contact person
- When the contact person was not available, only 48.7 percent were asked to leave a name and phone number
- Only 30 percent received callbacks when they left a message
- In 16.1 percent of the calls, prospective volunteers were not thanked for contacting the agency

This pattern makes it easy to understand why many agencies have difficulty recruiting volunteers.

The Continuing Nature of Recruitment

Some coordinators of volunteers make the serious mistake of assuming that recruitment stops when the potential volunteer shows up asking about a position. This is an incredibly wrong notion. The recruitment process is still in full swing during the initial interviewing of the potential volunteer (who is probably still "checking out" the SHIP) and continues throughout the volunteer's future relationship with the SHIP. Every morning that volunteers wake up they are, in fact, free to decide to stop volunteering. This means that recruitment is an ongoing process that continues as long as you need the volunteer. If you start to take the volunteer's presence for granted, your recruitment effort will ultimately fail. Volunteer retention, which we will discuss later, is simply the continuation of the recruitment process. Successful volunteer recruitment requires that volunteers never be taken for granted.

Key Points: Volunteer Recruitment

- Positive messages about the benefits of volunteering tend to be more effective than negative messages or scare tactics.
- Recruitment is an ongoing process that continues as long as you need the volunteer.
- Successful volunteer recruitment requires that volunteers never be taken for granted!

Chapter 5: Matching Prospective Volunteers to Roles

The Importance of Good Matching

Matching volunteers to roles is an often-overlooked task of the coordinator of volunteers. Finding the right role for a prospective volunteer ensures that the person will more likely be motivated to continue volunteering. People will volunteer for a short time in a task they do not like; they will not continue volunteering any longer than they have to. They will also tend not to perform the task effectively.

Organizations that lose volunteers early in their period of service are likely to do so because they did a poor job of matching prospective volunteers to suitable roles. Once the volunteer realizes she is in a position in which she is not comfortable she begins to look for ways to solve the problem. The simplest solution is to walk away.

Interviewing Prospective Volunteers

One of the most neglected areas of volunteer management is in effective interviewing. This is unfortunate because good interviewing skills are essential to performing that most crucial of all volunteer management tasks: matching a potential volunteer with a role and a working environment that he will enjoy.

Volunteer interviewing is not just a simple process of comparing candidates against a list of desired role-related characteristics; it is a much subtler process of trying to learn about the person who is being interviewed with the goal of shaping a work situation that will satisfy the volunteer and agency.

Among other things this difference in approach means that a volunteer interview must accomplish more than the usual job interview. There are two basic purposes: 1) Identify a "Fit," and 2) Recruit.

Identify a "Fit"

Finding a fit includes determining the interests and abilities of the potential volunteers, determining their suitability for particular jobs, and assessing their "rightness" for the SHIP, its style of operation, and its mission. "Fit" is the interpersonal matching of the needs and interests of the volunteer with the needs and interests of the organization.

An examination of proper fit would include determining these items regarding the volunteer:

- ✓ To what extent does the volunteer have both an interest in a particular role and the necessary qualifications to perform that role?

- ✓ To what extent does the volunteer have other interests and abilities that might be used to create a different role for him or her?
- ✓ To what extent does the volunteer have the personality for working well in a particular work environment?

"Rightness" means the likelihood that the volunteers will fit comfortably into the SHIP's working environment. In many cases, this will be the key predictive factor for success. Rightness could involve matters of style (relaxed, frenetic), personality (neat, messy; introverted, extroverted), behavior (smoking, non-smoking), political philosophy (traditionalist, radical), or other factors that would affect how the volunteers will get along, both with the SHIP in general and with the particular staff group with whom each might be assigned. Very often these interpersonal relationship factors become more important than factors of technical qualification, which can be learned if the volunteer is willing to stay with the SHIP.

"Rightness" means the likelihood that the volunteers will fit comfortably into the SHIP working environment…Often these interpersonal relationship factors become more important than factors of technical qualification."

Quite simply, a volunteer who is happy in her working environment will make the job happen; one who is unhappy will not.

Recruit

This includes answering any questions or concerns that the potential volunteers may have, letting the volunteers know that they have the ability to make a contribution to the SHIP and its clientele, or affirming that they will derive personal satisfaction from helping. It is a quite mistaken belief that individuals who show up for an interview have already decided to volunteer with the SHIP; they don't know enough yet to do so.

During the interview process, it is crucial to remember that the volunteer has not yet been recruited. At this stage each has only been "attracted" to the SHIP. One purpose of the interview is to give the volunteer the time to make a more deliberate examination of what the SHIP has to offer and for the SHIP to have a chance to "sell" the SHIP and its work to the volunteer. Equal time must be given to exploring why a particular role is important and interesting and whether the volunteer would be right for that role. If the interview is your first contact with the volunteer, then it is important to make the volunteer feel welcomed and wanted during the interview process. Volunteers should not feel as though they have already been caught by an uncaring bureaucracy that is only interested in determining which square hole each volunteer should fill.

The Interviewing Site

Because a volunteer interview requires a greater exploration of personal characteristics, site selection can be critical. Three factors are important:

- Accessibility
- A friendly atmosphere
- Privacy

In addition to being located in a site that is accessible – is on a bus route or has adequate parking, is equipped with ramps or elevators, etc. -- the volunteer should be warmly welcomed and should feel a sense of privacy and comfort there. Do not conduct the interview in a public place or in a shared office because this will deter many volunteers from offering complete information about their backgrounds and interests. None of us likes being eavesdropped on while discussing our personal lives.

Organize your schedule so that you will not be interrupted during the interview. Besides disrupting the flow of the interview, interruptions give the impression that the volunteer is of lesser importance than your other work. Remember the old adage "You never get a second chance to make a first impression." What potential volunteers see and feel during the interview may shape their eventual attitude toward the SHIP.

Pre-interview Preparation

The following should be prepared and ready before the interview:

- A list of possible volunteer roles with descriptions of work and required qualifications
- A list of questions to be asked for each role
- An application form completed by the volunteer with background information about her and her interests
- A set of open-ended questions to explore the motivations of the volunteer
- Information and materials on the SHIP and its programs

This preparation is vital to the success of the interview. A successful volunteer interview is quite different from simply having a pleasant conversation.

As a representative from the Volunteer Centre of Great Britain noted more than 20 years ago:

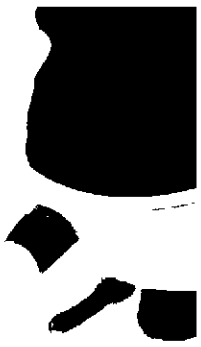
> *An interview is often defined as a conversation with a purpose; the interviewer who relies on spontaneity and impulse will often find he has had a delightful conversation but has failed to achieve his purpose. Effective interviewing relies on self-discipline in organizing and developing a conversation.*

Opening the Interview

The beginning of the interview should focus on:

- Making the applicant feel welcome. Express appreciation that he has come to meet you.
- Building rapport. Explain what you would like to accomplish and how she fits into the process. Let her know that the goal is to give her enough information to decide whether volunteering with you would be suitable. Let her feel "in charge."
- Indicating that either the applicant or the SHIP may decide that volunteering is not a good decision.
- Giving the applicant background information about the SHIP and its work. Ask him what questions he has about the SHIP and its purpose and programs.
- Focusing on her concerns and issues before concentrating on your own.

The key to beginning a successful interview is to quickly build rapport with the potential volunteer. It is crucial that the interview process belongs as much to the volunteer as it does to the SHIP. If there is a time limit for the interview, make sure that you have allocated sufficient time for the volunteer to express concerns and ask questions. The interview should be a mutual, not unilateral, information exchange process. It is a negotiation, not an interrogation. Be sure to explain at the beginning that the potential volunteer should feel free to ask questions or express concerns at any point.



Offering food or a beverage is an excellent way to open a volunteer interview.

Conducting the Interview

The major portion of the interview should be devoted to the following:

- Exploration of the applicants' interests, abilities, and personal situations. Determine why applicants are considering volunteering and what types of work environment they prefer.
- Discussion of various role possibilities. Explain the purpose and work situation of the different volunteer role opportunities available and let the applicants consider them. Encourage applicants to discuss how they would approach various roles, which will tell you more about their attitudes, their intentions, and their level of interest.
- Discussion of your requirements, such as time commitments, training requirements, paperwork, background checks, and confidentiality rules. Let volunteers know what will be expected of them.

Remember that you are still "recruiting" the volunteer at this stage so do not forget to explain why each role is important to the interests of the agency and the clientele.

Look for personality indicators that will help you match people to situations where they will be happy. This can include items such as desire for individual or group work.

An important skill for the interview is the ability to detect an unexpected talent in the volunteer and to begin constructing a possible volunteer role on the spot. This requires a good understanding of the SHIP and its programs. If volunteers conduct interviews (where they are very effective in building rapport and seeing things from the viewpoint of the potential volunteer), make sure they have a good background about the SHIP and how its work is organized.

Here are some examples of questions that can be used during the interview:

Questions to get the interview started:

- Is there anything you'd like to know before we get started?
- What can I tell you about the SHIP?

Questions to uncover motivations:

- Why would you like to become a volunteer at this time?
- What attracted you to our agency? Is there any particular aspect of our work that most interests you?

- What would you like to get out of volunteering here? What will make you feel that you have been successful?
- What do you think is the most important thing we should be doing to help our clients and to fulfill our mission in the community?
- What kinds of volunteer work have you done before? What did you like best about that work? What did you like least?

Questions to determine skills or work habits:

- "What skills do you think you have to contribute here?"
- What types of work do you enjoy? What types of work would you rather avoid?
- "What types of experience or training have you had in your work or other volunteering?"
- "How do you think you would go about this volunteer assignment? Where would you start and what do you think are the most important considerations?"
- Describe a project or a work experience that you were in charge of and tell me how you went about it.
- How do you deal with situations that don't go as you planned?

Questions to determine "fit":

- What have you enjoyed most or least about your previous volunteer work? About your paid employment?
- Describe your ideal supervisor. How do you prefer that supervisor relate to you?
- Would you rather work on your own, with a group, or with a partner? Why?
- Are there any types of clients that you would most prefer to work with? Are there types you would not feel comfortable working with?

Questions to verify or obtain more information:

- Give me an example.
- Tell me more.
- Why do you think that was the case?

While it is important to evaluate different elements for different volunteer roles, here are some general areas to watch for while interviewing:

- Ease in answering questions about personal qualifications and background
- Ability to communicate effectively
- Level of enthusiasm and commitment
- General attitudes and emotional reactions
- Other interests or hobbies
- Any sense of a hidden agenda
- Level of self-confidence
- Flexibility
- Maturity and stability
- Preference for a group or individual setting for volunteer work
- Types of questions asked about the agency and the position offered
- Time pattern of previous work and volunteer experience
- Reasons for coming to the interview
- Preferences in type of work

"Always remember the basic rule of interviewing: the more you talk, the less you learn."

Always remember the basic rule of interviewing: the more you talk, the less you learn.

Closing the Interview

The interview should be concluded by:

- Making an offer of a possible position to the volunteer or politely explaining that you have no suitable openings at this time.
- Explaining what will happen next: making background or reference checks, arranging a second interview with staff, scheduling training, or signing up for an orientation session. Explain the process, the timeframe, and what is expected of the volunteers at each stage.
- Obtaining permission from the volunteer to conduct any reference or background checks.
- Responding to any final questions or concerns.

Face-to-Face or Over the Telephone?

Some programs are simply not in a position to conduct interviews in person. This is not a common situation, but it obviously makes the recruitment process a less personal situation and inhibits both the ability of the SHIP to evaluate the volunteer and the volunteer to assess the SHIP.

Generally speaking, it is highly desirable to conduct face-to-face interviews for role situations that have the following attributes:

- When the work requires a longer time commitment and thus a higher motivational level from the volunteer.
- When the work entails greater responsibility or requires a capacity or skill above the ordinary.
- When the role is highly sensitive because of the nature of the work or the relationship with clients.

If you are unable to conduct in-person interviews for a role that has any one of these characteristics, it is highly desirable to schedule a 30-day review with such volunteers to see how they are performing and how they are feeling.

Overall Interview Suggestions

Here are some overall suggestions for the basic volunteer interview:

- Ensure you are not interrupted. This will make the interviewer and the prospective volunteer more comfortable.
- Be an active listener. To understand applicants pay close attention to what they are saying and not saying.
- Answer questions about the SHIP and its work openly and honestly. This will demonstrate your sincerity and your intelligence. You can't hide things from people who may work with the SHIP and will find out eventually anyway.

- Don't promise anything if you are not sure you can make a placement. Never promise anything you can't deliver.
- Describe the volunteer position honestly. Do not hide undesirable aspects of the role (perhaps in the hope that volunteers won't mind discovering them after they've signed on).
- Evaluate people on an individual basis. Don't assume they're like anyone else you've ever met.

Matching Volunteers to Work

Determining the correct match for a volunteer involves questions of role qualifications and temperament. Volunteers must be able to do or learn to do the role for which they are selected. But it is equally important that they "fit" into the work situation for which they are being considered. This means that the volunteer must be satisfied with the role being offered and view the role as desirable and fulfilling work. The work setting (including the timing and site of the job) must also be amenable to each volunteer.

Because it is difficult to make completely accurate decisions based on a 30-minute interview, it is considered a best practice to start all beginning assignments with a trial period, sometimes also called a probationary period. Let the volunteer know that, for example, the first 30 days of work will be done under a trial period for both the volunteer and the agency. At the end of the 30 days, a second interview will be conducted, during which both the agency and the volunteer will re-evaluate the assignment. At this time, either party may request a change of assignment, based upon their additional knowledge of the situation.

This initial trial period will make it easier to induce volunteers to try out roles about which they are uncertain and will make it more likely that any problems of mismatching will be identified early and corrected quickly.

> ✓ **Tip:** Consider a trial period, followed by a second interview, to determine "fit."

Screening Prospective Volunteers

A key quality assurance and risk management aspect of the coordinator of volunteer's role is developing and implementing a consistent screening process for each prospective volunteer. This is done directly by the SHIP or through the SHIP volunteer host organization.

When screening procedures are required, the prospective volunteer is told how long the procedures will take, how the information gathered in the screening process will be used, and how the prospective volunteer will be informed of the results. The discussion should include how the volunteer will be consulted if negative results are found.

Rejecting Potential Volunteers

The intent of volunteer interviewing is, naturally, to find a useful and enjoyable position for the interested volunteer. This, however, is not always possible. A key responsibility of a volunteer interviewer is to identify those cases in which the volunteer in question should not be asked to work with the SHIP.

Reasons why such rejection may be necessary include:

- There may be no suitable position for the volunteer within the SHIP.
- The volunteer may have expectations the SHIP cannot meet.
- The SHIP and the volunteer may not have congruent philosophies.
- The volunteer refuses to agree to SHIP requirements (for example, background checks, time schedules, or training commitments).

"Pay attention to your instincts, which, after all, you have been developing throughout your life."

In each of these cases, rejection should be automatic. It is in the best interests of the SHIP and the volunteer.

Rejection may also occur simply because the interviewer has a "gut" feeling that the person should not be accepted for the position based on responses to questions during the interview. Do not be unsettled when this happens, even if you cannot absolutely define why you are getting a negative feeling about the potential volunteer. Pay attention to your instincts, which, after all, you have been developing throughout your life. If you're unsure, you might ask another person to conduct a

second interview and compare that opinion with yours. As long as you have conducted the interview based on questions that truly explore the fitness and capability of the potential volunteer to perform the work required by a particular job, you should be comfortable with assessing that volunteer, even if you have trouble describing the nature or cause of your unease.

You might also "soften" the rejection decision by referring the potential volunteer to another agency for which you believe the person would be more suitable or by offering an alternative position within your agency. You might even, in some cases, accept the volunteer on a trial period, but you should know that this may simply postpone the inevitable and that "firing" the volunteer down the road will be much more traumatic than not making the initial acceptance. While "rejecting" another person who wants to help is never pleasant, remember that your primary obligation is to the safety and well-being of your clientele.

"While 'rejecting' a person who wants to help is never pleasant, remember that your primary obligation is to the safety and well-being of your clientele."

You can decide to not accept a prospective volunteer much easier if you begin the volunteer interview by stressing that your primary interest is ensuring that the SHIP has a role that you believe will work for the volunteer and that you will only go forward if you are sure the SHIP can deliver on this commitment. Consider using wording such as, "We are very cautious about involving volunteers. We only proceed if we are absolutely sure that both of us will benefit; if we, or you, have any doubts we would rather not risk wasting your time."

Streamlining the Intake and Matching Process

Studies of volunteers have strongly indicated that they have a desire to begin work quickly. This implies that the SHIP should work diligently to smooth and shorten the process for intake of volunteers, making it work as easily and as quickly as possible. For example, the Big Brothers/Big Sisters program learned that a critical factor in its intake process was that prospective volunteers weren't being told in advance:

1. How long the processing might take
2. That they might not learn anything from Big Brothers for extended periods of time regarding how the background investigation was proceeding

In other words, their volunteers were being left "in the dark." It is essential to make sure systems for screening work efficiently and that, if they do not, volunteers are

kept informed of what is happening and why the system is taking so long. Organizations that have complex systems for screening should develop a process for maintaining contact with prospective volunteers and for involving volunteers on a more limited basis (such as observers or trainees) while applications are being processed.

Matching Volunteers to Appropriate Roles is Key

Matching the volunteer to an appropriate role is a key trait for successful programs. It is the point at which a correct decision – one that puts the right person into the right role – will either support or undermine the nature of the volunteer/agency relationship. It is a complicated task because occasionally even the potential volunteer might not know what she wants to do or is truly capable of doing. Successful interviewing requires skills in relating to people and the imagination to see where their skills might best be applied. In the end, however, a successful interview will create the ideal match between the SHIP and the volunteer because it has defined an area of mutual interest in which both parties can benefit.

Chapter 6: Training Volunteers for Success

No One Volunteers To Fail

New volunteers need to receive the basic grounding that will enable them to perform successfully, especially if the skills required are not those they are likely to already possess. All volunteers need some level of indoctrination for their work with the organization. This preparation falls into two parts:

- **Orientation:** the process of preparing the volunteer for a clear relationship with the SHIP
- **Training:** the process of preparing the volunteer to perform specific work for the SHIP

All volunteers should know they will be required to attend orientation and training. Orientation may be distinguished from training in that it is more general in nature, providing basic information every volunteer should know. Training is designed to equip volunteers with skills and knowledge required for each specific role.

Orientation

Even if volunteers come to the job with all the skills necessary to do the job, they will need some orientation to the SHIP. Orientation is the process of making volunteers feel comfortable with and understand the workings of the SHIP. It is designed to provide them with background and practical knowledge of the SHIP and explain how they can contribute to the purpose of the SHIP.

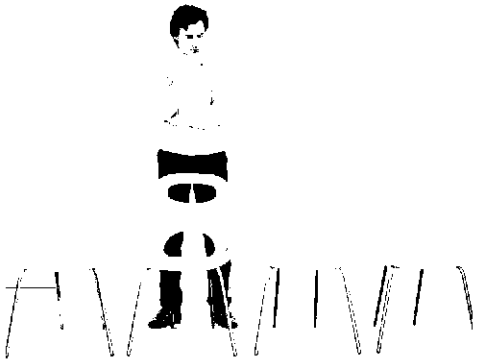
If the volunteers better understand the SHIP's systems, operations, and procedures, they will be able to contribute more productively.

"Orientation is the process of making volunteers feel comfortable with and understand the workings of the SHIP."

The Importance of Orientation

Three subject areas that should be covered during the orientation process are the social environment for the volunteers, the SHIP cause, and the systems for volunteer management. These aspects of orientation are designed to answer three basic questions for the new volunteer:

1. Cause: *Why* should I be working here?
2. Social: *Where* do I fit in with everyone else?
3. System: *How* will I be working here?



These three questions are crucial to the volunteer's comfort. A volunteer who does not "feel" right about these three aspects of volunteering will cease to feel a part of the organization. Much of the early retention difficulty in some volunteer programs is due to the absence of a good orientation. Orientation should "seal the deal" between the SHIP and the volunteer, clearly establishing the intellectual, practical, and emotional bonds between the two.

Some organizations avoid giving an orientation because of the difficulty in getting volunteers to attend. This problem can be solved by a variety of approaches. It might require altering the scheduling of orientations – placing them on weekends or evenings. It might involve altering the format of orientations – doing them one-on-one, in small groups, or in several shorter sessions. It may require making attendance mandatory, even if that means losing some potential volunteers. Make whatever adjustments are necessary, but ensure that all new volunteers receive a proper orientation. Even volunteers participating in one-day events should receive a short orientation, focusing on the cause and a brief description of the SHIP. This will remind them *why* they are engaged and open the door to further involvement. And, of course, whoever is managing the work area of volunteers at such an event should provide a "social orientation" by ensuring that volunteers get to meet and interact with other volunteers. It never hurts if food is served as well.

Perhaps the best way of understanding the importance of orientation is simply to consider its basic definition. **"Orientation" is the process of learning one's direction and bearings in the world; a person without orientation is, to put it simply, "lost."**

Cause Orientation

This area involves introducing volunteers to the purpose of the SHIP. It should cover a description of:

- The Medicare program
- The mission and values of the SHIP
- The history of the SHIP
- The programs and services of the SHIP host agency
- The SHIP's clients
- Future plans of the SHIP
- Other groups working in the same field, and their distinguishing characteristics from the SHIP

The presentation of these items should be a discussion rather than a dry description. The intention of this portion of the orientation is to allow the volunteer to begin to learn and adopt the basic values of the SHIP. Part of this will involve possible debate over the philosophy and approach the organization is taking to solve its identified community need; part may involve learning the myths and legends of the organization through hearing stories about early leaders or exemplary volunteers.

The goal of this discussion is to allow volunteers to make an intellectual and emotional commitment to the basic purpose of the organization – to consciously decide that they believe in and are willing to work toward achieving the mission of the organization. This portion of the orientation is intended to allow volunteers to "join the cause." It is also designed to give volunteers sufficient background to explain what the SHIP is. Volunteers who do not have this background may give out erroneous information about the SHIP. This discussion will also give the coordinator of volunteers an opportunity to learn about the philosophies of each volunteer and to determine whether these are congruent with the interests of the organization – to learn, for example, if a person is so motivated by a cause that he or she may go beyond organizational boundaries.

Cause Orientation: *Why* am I volunteering for SHIP?
"Providing Local Help for People with Medicare"

Social Orientation

This portion of the orientation introduces the volunteers to the social community that they are being asked to join and begins to forge the personal bonds that will sustain volunteer involvement.

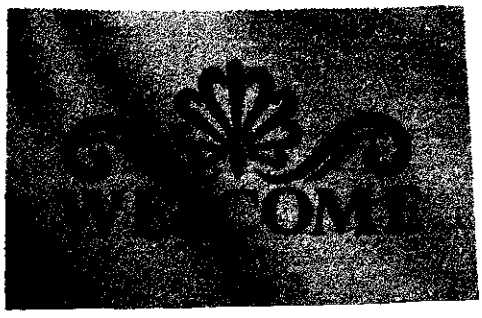
Included in this introduction are:

- An introduction to the leadership of the SHIP (who might participate in the orientation by presenting or leading part of the discussion on the mission of the organization)
- A "welcoming" by staff and current volunteers (through their participation in presenting subject areas or even as a purely social occasion)
- A description of the culture and etiquette of the SHIP (matters such as dress, customs, etc.)

This part of the orientation session can proceed in a variety of ways.

- It might be interspersed throughout other stages of orientation – official greeting, welcoming, presentation – to initiate personal contacts.
- It might begin right after formal acceptance of a volunteer with the assignment of a personal mentor or companion who contacts the volunteer, meets with her informally to welcome her to the organization and introduce her to its processes, and then supports her during her early involvement.
- It might consist of introducing the volunteer to his future supervisor and arranging for a discussion about how they will be working together.
- It might consist of a welcoming party for new volunteers hosted by staff and current volunteers.

The purpose of this part of the orientation is to show the volunteers who they will be working with and welcoming them into the social context of the organization. The goal is also to show the volunteers that they are a welcome addition to the team. It will also make volunteers feel more comfortable in participating in the remainder of the orientation session.



System Orientation

This portion of the orientation involves introducing volunteers to the system of volunteer management with the SHIP. It would include presentation and discussion of:

- The structure and activities of the SHIP, with illustrations of what volunteers contribute to those activities
- The system of volunteer involvement within the SHIP: policies and procedures, key forms and reporting requirements, etc.
- An introduction to facilities and equipment
- A description of volunteer requirements and benefits
- An introduction to recordkeeping requirements
- Timelines of SHIP's activities and key events

The simplest way to develop the agenda for this portion of the orientation session is to ask, "What would I like to know about this place in order to better understand how it works?" Remember that friends will ask volunteers about their volunteer work and about the SHIP. A volunteer who fully understands the SHIP can serve as an effective communicator with the public about the worth of the SHIP while a confused volunteer can present quite the opposite.

The purpose of this portion of the orientation session is to provide an organizational context for volunteers and make them understand how they fit into the processes of the SHIP. This material is often presented in a factual way – with charts and descriptive handouts followed by a question-and-answer period to clarify issues. It can be made more interesting by having different SHIP representatives – including volunteers, if possible – describe varying aspects of the work of the SHIP. Volunteers can see how their role relates to the work of the SHIP. It shows them the basic requirements of that role and how that role links to other areas of the organization.

Training

Training is the process of providing volunteers with the ability to perform specific types of work. Determining what training volunteers may need requires answering three questions:

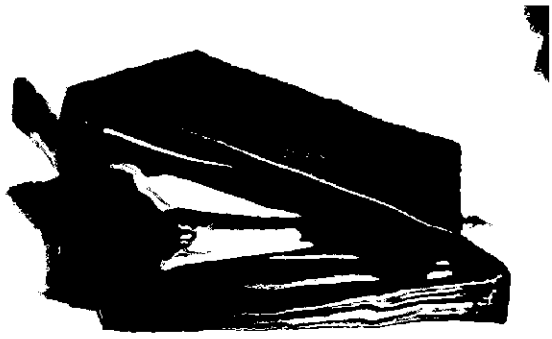
1. What *information* do they need to successfully perform the work?
2. What *skills* do they need to successfully perform the work?
3. What *attitudes* or approaches do they need to successfully perform the work?

Training to provide this information, develop these skills, and engender these attitudes can be provided formally, in a group setting or through self-paced online modules, or informally, through individual coaching or mentoring.

Designing Training

Training prepares volunteers for specific volunteer roles. Sometimes this training may need to be quite lengthy, particularly when volunteers are recruited who lack the specific skills required by the position. Crisis lines, for example, provide many hours of training in how to deal with callers. These hours may be spread over a couple weeks. Volunteer firefighters in the U.S. typically attend training once a week to polish up and expand their skills for as long as they are with the fire department. SHIP volunteers may receive an entire week of initial training solely on the subject of Medicare benefits.

Training can be presented through lectures, readings, discussions, field trips, videos, panel discussions, demonstrations, role playing, case studies, simulations, and more. Trainers commonly employ a variety of techniques so as to better retain the attention of the audience. There are two primary content areas to cover in designing and conducting volunteer training, regardless of the role for which the training is being provided:



1) Their role functions

2) Their responsibilities to other team members.

Training in Role Functions

It is of course a fundamental requirement to provide training in the specific skills needed to perform a role. In addition, cover these elements when explaining the functions of a specific volunteer role:

1. "This is what you *should* do to accomplish in your role."
2. "This is what you *should NOT* do."
3. "This is what you should do *if* you encounter the following situations."

For example, a volunteer who is recruited to be a SHIP counselor might be trained according to these three elements:

1. *Do*: Be on time or notify the coordinator of volunteers at least three hours in advance if you are going to be late. *Do*: Meet with clients in a public setting that allows for a private conversation, such as the SHIP office or the library. *Do*: Become familiar with how to get to the meeting location. *Do:* Have a roadworthy vehicle if your role involves driving.
2. *Don't* offer to give rides to the clients you counsel. Providing transportation is not a SHIP counselor role.
3. *If* the client asks for your opinion of her doctor, don't give one. Tell the client you aren't qualified to make such a judgment, nor does the SHIP program offer opinions about specific doctors.

> ✓ **Tip:**
>
> See Chapter 7 for more information on enforcing boundaries in volunteer behavior.

The content of the training provides the volunteer with the collective experience (both positive and negative) that previous volunteers have acquired. The content should be developed with the assistance of staff and volunteers who are familiar with the work. It would also enhance training if the session were also delivered, in part or in full, by these same staff or volunteers.

Responsibilities to Other Team Members

Effective training must also communicate to volunteers the web of relationships in which they work. They need to understand who they work with - their "team" - as well as how and when to rely on this team. Tell volunteers:

1. This is <u>with whom</u> you will be working, while fulfilling your role in the task.

2. This is their role and how it fits into the task being completed.

For example, this could include ensuring volunteers know who their supervisor will be and any other staff or volunteers who will be assigned to work in concert with them. A volunteer working in concert with other volunteers to serve a particular client should be introduced to those volunteers and learn what each is providing and how their efforts dovetail. For some SHIPs it will also include a description of what issues need to be discussed with SHIP staff and what can be addressed through the volunteer host organization.

Establishing a Mentor System for New Volunteers

The State Health Insurance Assistance Program is an example of a knowledge-intensive volunteer organization, one in which some volunteer roles require the ability to assimilate a lot of new and technical information and be comfortable explaining this information to others. Other examples of knowledge-intensive volunteer programs include Volunteers in Tax Assistance (VITA), Senior Medicare Patrol (SMP), and 4-H Master Gardeners. Knowledge-intensive programs tend to suffer a lot of volunteer attrition during the early stages of volunteer involvement, including a high dropout rate during training.

This can happen for two reasons:

1. Volunteers feel they can't learn the required information and quit because they don't want to let the SHIP down.
2. Volunteers learn the required scope of the work and decide they don't want to invest the needed effort.

One excellent method of both making volunteers feel welcome and enhancing their knowledge and skill is by formally creating mentoring relationships between new and experienced volunteers. This has been done successfully in the Master Gardener Volunteer Program with positive results on volunteer retention. For example, in Oregon, the mentors call and welcome new volunteers to the program, remind them of upcoming training events, and spend time with them during their first class. The mentors also work beside the newcomers during their first workdays.

The results have been impressive:

> *Retention of new members has been much higher since the mentor program was introduced. Before the program was introduced in 1993 approximately 50 percent of the new volunteers completed the class and their voluntary service commitment. Since 1993, 38 of 51, or 75 percent, of volunteers have completed their commitments and many have gone well beyond the minimum commitment of time.*

The Florida Master Gardener program had similar success:

> *Dropout rates for the three annual Master Gardener basic training programs prior to the mentor program were 26 percent, 17 percent, and 27 percent for the years 1995, 1996, and 1997, respectively. While the 1998 class in Pinellas Country was one-third smaller than the previous years, the trainee dropout rate for the basic training program was 2%.*

Mentors provide a personal welcome to the organization, establish a personal connection, help the volunteer assimilate new information, and voice the encouragement that may get a new volunteer through uncertainty. Mentoring also provides an excellent opportunity to recognize the skills and knowledge of experienced volunteers, enabling them to model desired behaviors for the new volunteers.

Key Points: Mentoring

- Mentoring is an excellent method of making volunteers feel welcome
- Mentoring enhances volunteers' knowledge and skills
- Mentors provide a personal welcome to the organization
- Mentors establish a personal connection for new volunteers
- Mentors voice the encouragement that may get a new volunteer through uncertainty
- Mentoring provides an excellent opportunity to recognize the skills and knowledge of experienced volunteers, enabling them to model desired behaviors

Chapter 7: Supervising Volunteer Performance

Contents continued

What Volunteers Want from Supervision

Volunteers generally want the same things in supervision as paid staff want. These include:

- Identified supervisor
- Clearly defined responsibilities
- Clear and consistent directions
- Helpful guidance
- Support and assistance
- Availability
- Frequent communication
- Feedback

"The ultimate goal of supervision is to help the volunteer be more successful!"

The ultimate goal of supervision is to help the volunteer be more successful.

Building a Performance Management System

Effective coordinators of volunteers need skill in managing people for two reasons. First, they may be supervising volunteers directly. Second, they must ensure that staff and partners do a good job of managing the volunteers. Both of these areas demand knowledge of managing the relationship between volunteers and those they are working with and responsible to.

The coordinator of volunteers faces some interesting challenges in management:

- Motivating those who do not work for pay requires more skill and greater ability than is commonly the case among those who supervise paid employees where the loss of employment can ultimately be threatened.
- Volunteer programs may contain a much wider range of people to be managed – some programs involve volunteers as young as early teens and as old as their eighties. The SHIP program has volunteers who often have much more life experience than many paid staff do.

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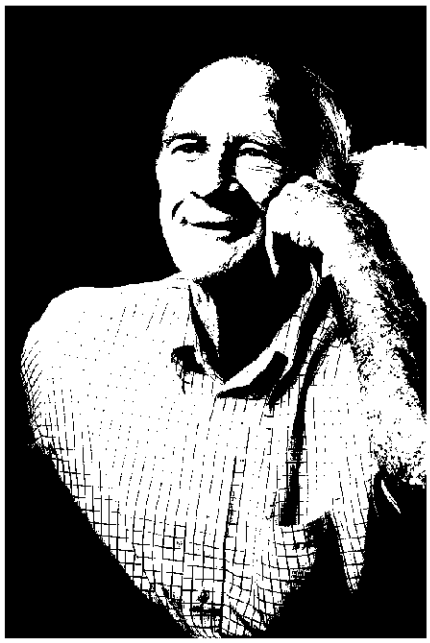
The vast majority of supervisory interactions with volunteers are positive in nature; they are not connected with a volunteer doing anything "wrong," either intentionally or unintentionally. They are also not connected, as is far too often the case in the world of paid employment, with a person who is unhappy about her work situation. Unhappy volunteers tend to be a self-solving phenomenon – they leave and volunteer elsewhere. Supervising volunteers is more a case of working with motivated workers who only want to do an even better job. These volunteers both benefit from and appreciate good supervisory feedback.



While a volunteer performance management system holds volunteers accountable for complying with SHIP rules and procedures, the tone used in enforcing requirements should be positive. Threatening volunteers is not an effective supervisory technique. It is certainly not as effective as developing a good supervisory relationship – explaining to the volunteer the program requirements and then coaching the volunteer on how to best meet the needs of the SHIP and its beneficiaries.

Still, the SHIP may occasionally encounter a volunteer who cannot work productively within the SHIP environment. Such situations must be dealt with in a way that honors both the needs of the SHIP and the rights of the volunteer. In practice, however, this tends to be a minor part of supervision of volunteers and should not overshadow day-to-day positive interactions.

In providing supervision and support to volunteers, it is important to have a system for performance management. One way to envision such a system is to construct a continuum of volunteer behavior, ranging from very good performance to very poor performance, with the supervisory focus progressively changing along that continuum:

Exemplary Performance	←→	Satisfactory Performance	←→	Unsatisfactory Performance

A performance management system works along the entire extent of this continuum, with the aim of moving volunteers toward exemplary performance in all aspects of their work. In everyday practice, however, some volunteers will, for different parts of their role, be simultaneously in different places along the continuum. A volunteer might, for example, be outstanding in delivering presentations but be consistently tardy in sending in timesheets and other paperwork. The goal of performance management is to create the opportunity and motivation for volunteers to exhibit exemplary performance in all aspects of their work.

Setting Standards for Good Performance

Supervision and performance management require setting the standards for everyday performance. To accomplish this you will need to:

- Establish and inform people regarding expectations, goals, rules, and procedures
- Build commitment to those standards by involving staff and volunteers in their purpose and application
- Use immediate positive reinforcement to encourage adherence to standards
- Build personal relationships so that volunteers will adhere to standards out of loyalty to you and to their colleagues
- Model the behavior you want followed and encourage other staff to model the behavior
- Refuse to accept poor performance

Most critical of the above is ensuring that both you and other staff model the behavior that you require of volunteers. If staff are seen breaking rules and behaving in ways that violate procedures or values, volunteers may emulate this behavior. Unwritten rules of conduct will invariably override written rules, especially when the unwritten rules are followed by those in seeming positions of authority.

Delegating Work to Volunteers

Much of the work done by SHIP volunteers is "delegated" within the context of the specific role. The role performed by a volunteer delineates the typical assigned work and responsibilities. If you assign additional or different work to volunteers, however, you will need to plan and communicate accordingly.

When delegating, consider the following checklist:

Planning the Assignment

I have carefully considered:

- ✓ The purpose/goal of the work
- ✓ A completion date
- ✓ Required standards of performance
- ✓ Parameters for the work
- ✓ Degree of authority delegated to the volunteer.
- ✓ Budgetary authorization
- ✓ Degree of communication/involvement with me or with others
- ✓ The fact that the assignment may be done differently than if done by me personally

Selecting the Person to Do the Assignment

I have carefully asked myself:

- ✓ Who is most interested in doing the work?
- ✓ Who has the most ability to get the job done?
- ✓ Who has the personal contacts to get the work done amicably?
- ✓ Who will find the work challenging and an opportunity for advancement?
- ✓ Who can fit the work into his or her schedule with the least disruption?

Making the Assignment

In making the assignment, I have:

- ✓ Carefully described the purpose/goal of the assignment
- ✓ Explained the parameters of the work: budget, timeframe, other considerations

- ✓ Explained the degree of independent authority that is being granted
- ✓ Agreed on communication checkpoints
- ✓ Outlined available resources: finances, additional help
- ✓ Explained relationships with others who will be involved

Checking the Assignment

In following up, I have:

- ✓ Informed others of the authority delegated to the volunteer
- ✓ Set reasonable timelines and reporting schedules
- ✓ Listened carefully to the opinions of the person to whom the work is delegated
- ✓ Allowed room for creative thinking in accomplishing the assignment
- ✓ Provided follow-up support and encouragement
- ✓ Remained open to making changes in the delegated assignment, if needed
- ✓ Intervened only if absolutely necessary, and then with minimal interference

Considering the above items in advance will help you better select and provide instruction to the volunteer.

The Factor of Distance in SHIP Volunteer Management

SHIP volunteers are often geographically distributed and therefore do not typically work within the SHIP office or within the office of a partner organization. In a sense, SHIP volunteers might be considered "long-distance volunteers" with the "distance" being between the volunteers and the SHIP office instead of between the volunteers and the work they are doing. This creates some additional elements that must be factored into a performance management system. It is worth noting that if your SHIP works through partner organizations then a lot of these same factors will impact paid staff at the partner organization – they will also be affected by the distance between them and the SHIP central office.

The increased complexity in managing volunteers at

a distance is based upon logistical and interpersonal grounds. The logistics of dealing with individuals in locations apart from our own are quite formidable. People are harder to locate when you need them; communication more often gets delayed, distorted, or goes totally awry; people don't have access to the same resources, equipment, and support.

Interpersonal problems also abound. We are more accustomed to dealing with people on a face-to-face basis, so communication at a distance can seem unnatural and may work less perfectly. It is hard for supervisors to trust what they can't see, so there can be doubt that workers are doing what they are supposed to. At the same time, volunteers find it difficult to take orders from a person who isn't on the front line to actually experience conditions, so it is hard to give proper credence to directives from a central office. They also often feel left "out of the loop" in decisions that affect their work.

A coordinator of volunteers in a long-distance system must work hard to reduce this distance and to establish a working environment that offers a sense of bonding and teamwork, good communication, and a feeling of control for all parties. There are three key areas in which to concentrate efforts:

1. Connection
2. Communication
3. Control

Creating a Sense of Connection

All long-distance supervisory relationships work better when there is a sense of identification, or bonding or connecting between headquarters and field workers. Volunteers work better when they feel closely connected to the organization, when part of their identity is wrapped up in being a member of the organization. We work more effectively with those with whom we have a sense of shared experience and with those with whom we think we have a personal relationship. In the usual work situation, this feeling will often develop naturally over time; it will only happen with long-distance volunteers if you continually strive to create it:

- Strive to achieve a sense of personal contact between the SHIP and the field. People are more likely to communicate with those they know and are more likely to forgive errors in communication. Volunteers are also more likely to feel comfortable being supervised by those

"Strive to achieve a sense of personal contact between the SHIP and the field."

with whom they have some personal knowledge, rather than a "faceless" being from above. They are more likely to trust and work well with us when they know us. They will also value us enough to look after our interests as well as their own.

- The key moment in the connection experience is when volunteers first join the SHIP. It is important at this point to give them a sense of welcome and inclusiveness, demonstrating that the organization truly values them and welcomes them into the group. At this early point, the behavior of volunteers and their attitudes toward others can easily be shaped by how they perceive the culture of the SHIP. Consciously greet and welcome the new volunteer to make her feel at home, then frequently seek her out during the initial days. Research suggests there is a 60-day window of opportunity in which opinions are firmly shaped regarding whether the volunteer establishes a positive or negative relationship with the organization.

"Consciously greet and welcome the new volunteer to make her feel at home, then frequently seek her out during the initial days."

- One way to help people get to know each other is to bring new volunteers for a visit to headquarters. Frequent meetings (conferences, in-service training, workshops, trips, planning retreats) are another way to achieve this. A supervisor can get to know his or her people by visiting them in the field, but this should be mixed with attempts to bring the field people into headquarters to give them a sense of relating to the larger organization.

- There are ways to assist connecting that do not require face-to-face meetings, as long as they do not entirely replace face-to-face contact. These include electronic mail systems, telephone messaging systems, and other means of electronic communication. Publishing a telephone directory or setting up a web page with photographs are other ways of helping people to see each other as human beings and not as cogs in the machine. Additional ways include support groups or using teams composed of people from different areas.

- Mentors and "buddies" establish bonds within the SHIP volunteer network. Keep in mind, however, that the bonds formed will be stronger with the individual than with the SHIP. If the mentor leaves or is dissatisfied with the SHIP, this will affect the feelings of the volunteer. Mentors and buddies should not entirely replace contact from the supervisor or coordinator of volunteers.
- Connecting can be strengthened through adding the personal touch to communication. Being interested and concerned in another's personal life, remembering birthdays and anniversaries, or remembering and asking about family members are ways to show distant volunteers that you value them as people, not just as workers.
- Having a common vision is another key element in connecting. People who feel they are working toward a mutual goal and who feel responsible to each other are more likely to perceive shared interests and values.
- Recognition events are great opportunities for bonding and mutual celebration. Being congratulated in front of a peer group can strengthen peer connections if the recognition system is perceived as fair and honest.

Maintaining Communication Linkages

Supervising people who work away from your office requires proactive efforts at communication. The main danger is that people will become alienated from the SHIP and develop an "us versus them" attitude. Consider the following suggestions:

- People in isolated or separated settings will naturally have more communication problems than those who are gathered in one spot. The wise supervisor will simply plan for this difficulty and adjust to compensate. Generally speaking, processes will take longer, will include a greater chance of misunderstanding, and will need to be managed more carefully.

- Volunteers in isolated or separated settings are prone to develop fears about their degree of inclusion in the system. They will worry about whether they are being kept informed of things (both as decisions are considered and after they

are made) and whether their input is sought and valued.

- Withholding information from your people creates a sense in them of having second-class status. Secrets are the bricks in the walls between people. People from whom information is withheld will go to extraordinary lengths to either obtain the information or to create their own versions of what is going on.
- The longer it takes for a decision to be made at the central office, the more left out people outside will feel. The more important the response, the longer the response time will seem. Strive to get back quickly to those in the field, if only to deliver an interim response. Remember that they can't "see" that you're doing something with their message; to them no response will seem as though they are being ignored.
- Much of communication in an office takes place by osmosis – we learn things simply because we are in the vicinity of their occurrence. A supervisor in headquarters is in a much better position to learn via osmosis than a field worker, and a wise supervisor proactively attempts to pass along as much information as possible to the field. It is better to pass more information than needed than to give the field a sense that you are restricting their access to information.

"A wise supervisor proactively attempts to pass along as much information as possible to the field…Good communication should be viewed as a web connecting all within the system – it should function up, down, sideways, and across."

- Good communication should be viewed as a web connecting all within the system – it should function up, down, sideways, and across. If you do not design your system to function this way, your volunteers will re-engineer it to do so and will probably leave you out of their design.
- Claims by central office staff that it is difficult to communicate effectively and swiftly with geographically separated volunteers will never be believed by those in the field. Field volunteers are connected by a highly unofficial "rumor mill" that communicates instantaneously.
- Uniformity should not be pursued as an end in itself. Use what works, which may be very different with volunteers in different situations. As a supervisor, your job is to find a method of communication that works for each volunteer.

Exerting Supervisory Control

The kind of person who works best in a long-distance relationship is a self-starter. This volunteer is internally motivated rather than externally goaded, is proactive rather than reactive, and sometimes makes decisions instead of waiting for instructions. This volunteer has initiative and doesn't need to rely on others to give orders.

The challenge with these volunteers is to channel the energies of their entrepreneurial personalities and at times to rein them in. Managing long-distance volunteers requires establishing a zone of control between these two extremes, as too much variance in either direction will impair the ability to perform effectively in a separated work unit.

Some actions to control entrepreneurial volunteers without demotivating them include:

- **Set Priorities**

  The main tension between supervisors and long-distance volunteers is between the volunteer's need to decide what he or she will do and the supervisor's need to make sure that those actions are effective. To minimize the conflict, establish clear priorities to guide the volunteer's daily decisions. These priorities should give a clear sense of what is important and how the volunteer's time should be spent even when a supervisor is not around to give immediate instructions.

- **Establish Clear Responsibility for Results**

  One problem with distance is that volunteers may stray from the focus of the program. By agreeing on what the volunteer is trying to accomplish, the supervisor has some confidence that the volunteer will channel his energies in the right direction.

- **Designate Checkpoints for Follow-Up**

  One of the most common supervisory mistakes is not having clear checkpoints to monitor volunteer progress. These will both motivate the volunteer to work toward the desired objectives and alert the supervisor if the volunteer is straying off course.

Supervising long-distance volunteers is much more difficult and uncertain than supervising volunteers who work within the same office structure. The coordinator of volunteers working in this long-distance environment must accept the fact that supervision will work less perfectly, more slowly, and with greater confusion than desired.

Evaluating Volunteer Performance

Coordinators of volunteers do not commonly look forward to the prospect of conducting an evaluation of a volunteer. Other staff who work with volunteers may be even less enthusiastic about assisting with the evaluation process. Many volunteer programs, in truth, cannot even claim to have a process for volunteer evaluation, except in a very loose sense. Evaluation, however, is not something to be avoided, especially if you realize that it can be a positive management technique.

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Why Evaluate Volunteers?

Rather than dreading the prospect of evaluation, you should be reassured by two important facts:

1. Most volunteers want to do the best job they can. The absence of feedback and assistance is both demeaning and disturbing to them.
2. Most volunteers will "win" in assessments.

Failing to evaluate a volunteer sends a clear message that you don't care about the quality of the work and that you don't care much about the volunteer. Both volunteers who know they aren't doing well and those who think they should be congratulated for good work will think less of the volunteer effort, and of you, if evaluations are not conducted. There are two basic reasons for conducting volunteer

evaluations:

1. To help the volunteers work closer to their potential
2. To help the SHIP better involve volunteers

These reasons do not include dealing with all the small performance problems that supervisors have been ignoring since the last evaluation. A periodic volunteer evaluation can help shape the overall performance of the volunteer, but it cannot and should not replace the day-to-day coaching and supervising that must occur.

Setting Up the Evaluation System

There are various ways to develop an evaluation system. The first issue to be faced is what to call it. Here are some possibilities:

- Evaluation system
- Performance assessment system
- Work appraisal
- Progress planning session
- Feedback meeting
- Annual review

Clearly, these have different connotations. One suggestion is that you refer to the system with the same terminology used for paid staff because this will send a clear message about the equal value of volunteer efforts. You can also make the volunteer evaluation process congruent, if not identical, to that used with staff. This system should be explained to each volunteer during the initial orientation session and should be reviewed with each staff person who will supervise volunteers.

It is impossible to conduct evaluations if you do not have accurate role descriptions for each volunteer. Without a good role description that outlines the goals, objectives, and performance measures of the role, supervisors will not know what they are asking of volunteers and volunteers will not know what is expected of them. Consider this rule of thumb: If you don't know what you want from volunteers, why should they?

Conducting the Evaluation Discussion

The evaluation session should be a two-way meeting. It is your chance to talk about the volunteers' performance, giving praise and suggestions for improvement. It should also be the volunteers' opportunity to talk about how their participation can be enhanced, which might even include discussing their moving to a new volunteer position.

The easiest method to conduct the evaluation session is to follow the RAP method:

- *Review* the past.
- *Analyze* the present.
- *Plan* the future.

Here are some suggestions:

- Don't get overwhelmed by forms. The main purpose of the session is to have a substantive conversation with volunteers about how their performance can improve, not simply to fill out forms for the filing system. The forms are helpful (and can be particularly so for your successor, who may try desperately to find out what went on before she arrived), but they are not the major concern during the discussion.
- Start with the role description. Begin by learning if it, in fact, describes what the volunteer has been doing. Take notes so you can adjust it to reflect reality. The major "problem" with highly motivated volunteers is that they produce rapid "scope creep" (expanding what they are doing beyond the original work agreement) in their assignments. You don't necessarily want to discourage this, but you do want to know about it.
- Stick to the basics: job proficiency, working relationships, comparison with last review.
- Listen at least as much as you talk. Tell the volunteers this is their opportunity to evaluate the program and you want their ideas on how to make things better both for them and for other volunteers.
- Remember that the evaluation may show as much what you need to do as what the volunteer needs to do.

Key Point:

Remember the **RAP method** of evaluation:

1. **Review** the past.
2. **Analyze** the present.
3. **Plan** the future.

The Positive Side of Evaluation

Rather than thinking of evaluation as a system for dealing with problems, you should think of it as a way to reward those who are doing well. The percentage of volunteers who are troublesome is fairly small; those who are hard-working constitute the vast majority. This means that the majority of evaluation comments can be positive -- praising accomplishments.

The evaluation session can also be diagnostic in nature, allowing you to determine how volunteers are feeling about their work. For example, volunteers who are in intensive job positions often get burned out. Volunteers also frequently fail to recognize such problems and fail to ask for help because their commitment drives them to continue to work. The evaluation session can provide the astute coordinator of volunteers the opportunity to determine whether a good volunteer is becoming burned out, or bored, or needs to be transferred to another position. You also can find out a volunteer's readiness to be promoted to increased responsibility. The session thus becomes one of mutual evaluation, with the intent of rewarding and advancing those who have been productive.

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Analyzing Problem Behavior or Performance Situations

Because volunteers are human, it is natural to sometimes encounter difficult behaviors. We are going to examine these behaviors in some depth, since the reasons vary.

Common Reasons for Poor Performance

Broadly speaking, poor performance results from either a lack of ability or a lack of motivation. This leads to four different types of situations:

1. The volunteer is both *motivated* and *able*.
2. The volunteer is *motivated* but *not able*.
3. The volunteer is *able* but *not motivated*.
4. The volunteer is *neither* able *nor* motivated.

The Motivated and Able Volunteer

If the volunteer is both motivated and able, problems will probably be caused by unclear performance expectations, by difficult personal relationships with paid staff (covered in the next chapter), or with other volunteers. In the case of unclear performance expectations, staff may think the expectation has been communicated clearly, but it may not have been. To take a simple example, a volunteer who is chronically late for a presentation may not know that it matters whether he or she is exactly on time. In the case of difficult personal relationships with staff or volunteers, where the problem is interpersonal, the role of the coordinator of volunteers is to counsel and engage in conflict resolution or to shift the volunteer to a setting where the conflict does not exist.

The Motivated but Unskilled Volunteer

If the volunteer is motivated but not able, you can solve the problem through training, counseling, or coaching. Staff who have the needed abilities may be able to upgrade volunteer skills. Staff may not be very good at coaching and training, however, so you may need to provide some technical assistance to help them know how to transfer their knowledge and skills to the volunteer.

The Able but Unmotivated Volunteer

If the volunteer is able but not motivated, the primary role of the coordinator of volunteers is placing the volunteer in a more motivating set of circumstances. Check these points:

- ✓ Is the volunteer placed in a job she wants to do?
- ✓ Is that job designed according to the principles described in Chapter Four?
- ✓ Does the volunteer see the connection between her work and the mission of the organization?
- ✓ Has the volunteer received adequate recognition for the work she has done?
- ✓ Is the volunteer empowered to make decisions?

If the answer to any of these questions is "no," remedy the situation according to the principles discussed in this manual. You should note that the "failure" in these cases is not that of the volunteer: it is actually a common problem in volunteer screening. Given the difficulty of fully understanding complex human needs in the short time period of a volunteer interview, it is likely that either you or the volunteer will not have communicated accurately about a particular volunteer role. Rather than worrying about this, simply make sure that you check with volunteers regularly to see how they are feeling about what they are doing. Offer them alternatives if they are not feeling good about their current involvement.

The Unable and Unmotivated Volunteer

The fourth possibility is that the volunteer is neither motivated nor able to do the work that needs to be done. In such a case, you could try to find a position that will meet the volunteer's motivational needs and is more suited to his skill level. If no such position is available in your organization, you may find the easiest course is to refer the volunteer to a more appropriate agency.

Noticing Warning Signs

There are some common warning signs that indicate approaching problems. Consider the demonstration of any of these behaviors a warning that something is wrong; a combination of several of these needs to be seen as symptomatic of a serious underlying problem:

1. The quality and quantity of work begins to decline. The volunteer makes many mistakes.
2. The volunteer often comes late to assignments.
3. The volunteer simply does not show up for work or meetings.
4. There is a lack of enthusiasm.

5. Rarely, if ever, does the volunteer make suggestions or show initiative.
6. A normally verbal and open volunteer becomes silent and closed down.
7. The volunteer continues to avoid parts of his job – especially those that are more complex or disagreeable to him.
8. The volunteer blames others for his or her own errors or shortcomings.

9. The volunteer is less agreeable, affable, or cooperative. He or she regularly whines, complains, or finds fault with others.
10. The volunteer avoids interaction with colleagues.
11. The volunteer ignores timelines and due dates for projects.
12. Co-workers and direct supervisors complain about the volunteer and his or her performance.
13. Reports reach the coordinator of volunteers of the volunteer "bad-mouthing" the organization, program, or key leaders.
14. The volunteer explodes over insignificant issues, events, or problems; reactions are out of proportion.
15. The volunteer projects an attitude of "nothing is right."

Responding to Warning Signs

When you notice warning signs, respond by taking the following steps so that you can find out what is find out what is really happening:

1. Meet in private with the person. Describe what specifically has been observed and ask her if there is an underlying issue that needs to be discussed. Do not place any interpretation on the observed behavior; allow her to explain it if she will.
2. Avoid rushing to judgment of the feedback that is given. Listen attentively, do not interrupt, and allow silent spaces in the conversation that give her time to gather her thoughts and consider how to express herself. Encourage honest feedback through body language, attentive listening, and avoiding defensiveness.
3. Determine the real issues motivating the behavior:
    - Has something changed in her personal life that is forcing a shift in priorities, energy allocation, concentration, etc.? A critically ill family member at home can distract a typically enthusiastic volunteer and cause many of the problem symptoms noted here.
    - Is she the victim of misinformation? Does the volunteer believe changes are being made without her input?
    - Is she upset about a specific occurrence and is thus "fighting back" by reducing her productivity?
    - Is she experiencing difficulties with other volunteers or agency staff?

- Is she simply burned out? Volunteers, like paid workers, can stay in a job or location beyond their energy limits. Many are unable to take a break because of high commitment.

4. Ask the volunteer what she sees as a successful response to her issues. What would be best for her?
    - A time-out or leave of absence to regain her old enthusiasm?
    - A move to a different assignment?
    - A full release from the perceived burden of staying?
5. Ask the volunteer what you or others might do to help solve the problem and then how she can solve the problem if others don't act.
6. Restate your expectations and the need for the volunteer to comply with appropriate rules and behaviors.
7. Agree on a timeframe for resolution of the problem. If leaving is the chosen option, select the timeframe best for the program. Allowing a disgruntled volunteer to stay for a month when the coordinator of volunteers feels she will continue to contaminate the work climate is unwise even in the face of the volunteer's assurances that she'll be positive and productive.

When behavior becomes abnormal or negative, consider the actions as symptoms and warnings of problems about to erupt and take steps to intervene swiftly. Remember that the "problem" may seem to be the person involved, but the root cause might also be the situation that exists or the relationship among several persons. Regardless of the cause, the coordinator of volunteers must insist on the volunteer meeting the SHIP's performance expectations. If the volunteer is not meeting those expectations, you must intercede for the good of the SHIP.

"Remember that the "problem" may seem to be the person involved, but the root cause might also be the situation that exists or the relationship among several persons."

Giving Effective Feedback to Volunteers

A critical part of the process of performance management is guiding the volunteer in ways to improve his performance or correct his behavior. Feedback is the supervisory tool for conducting this communication.

Feedback comes in both *positive* and *negative* flavors.

Positive feedback:

- Should be given at least as often as negative feedback. It is both highly desirable and more likely that the supervisor will have the opportunity to give it much more often. It cannot be given too frequently.
- Should be given as close to the good behavior as possible.
- Should praise both the act and person: "I heard you did a great job on that presentation last night and that's exactly the kind of work I'm used to getting from you!"

The phrasing of positive feedback is relatively simple: "Outstanding!"

One of the roles of supervisors is to "catch people doing something good" so they can provide positive feedback.

Negative feedback is much more complicated.

Many supervisors avoid giving negative feedback because they don't want to confront or offend a volunteer. Some supervisors think that giving negative feedback will cause the volunteer to quit. Each of these is incorrect and simply ensures that the problem will grow. The best way to encourage problem behavior is to ignore it.

There are some basic rules in providing negative feedback:

- The feedback should cover a specific incident or behavior and should compare what was done with the required standards for volunteer behavior.
- The feedback should restate appropriate behaviors and expectations to re-enforce them.
- The feedback should focus on the behavior, not the person – i.e., should criticize what was done rather than make a judgment about the person doing it.

- The feedback should discuss the possible consequences of the behavior for the SHIP, its beneficiaries, and other volunteers.
- The feedback should encourage improvement.

The biggest mistake made in giving negative feedback is appearing to criticize the *person,* not the *behavior.* This can be reflected in generalizing from the specific situation under discussion to a more universal indictment of the volunteer or it can manifest in statements that attack what you think are the motives or mental state of the volunteer. Each of these is likely to result in a strong defensive response – the volunteer will feel attacked and will defend herself.

Key Points:

- **Positive feedback** cannot be given too frequently! One of the roles of supervisors is to "catch people doing something good" so that they can provide positive feedback.
- The biggest mistake made in giving **negative feedback** is appearing to criticize the *person,* not the *behavior.*

Using I-Messages

If you are not accustomed or comfortable with delivering negative feedback you might consider using what are called "I-messages" to shape what you wish to say. I-messages have the following elements:

1. A description of the specific behavior or defect exhibited by the volunteer: "You were late for last night's presentation and didn't let the other volunteers know you would be late."
2. How the supervisor feels about the situation: "This surprises me because I have always been able to count on your reliability."
3. Why you feel that correction is needed: "You being late made us look bad to the audience members who showed up on time. It also made things difficult for the other volunteers who were there and had to adjust to your delay."
4. A request to help prevent a recurrence of the situation: "How can we make sure that this doesn't happen again?"

This process of "I-messages" and a description of the problematic behavior should continue until a satisfactory course of remedial action is identified. And, of course, you don't give negative feedback until you have learned exactly what happened and whether the volunteer has a good reason for what he did. Negative feedback only occurs when you've concluded that the volunteer is, in fact, at fault.

Following this template for framing negative feedback has some clear advantages:

- It provides you with structure for giving constructive, albeit critical feedback.
- It encourages you to prepare and practice what you're going to say.
- It helps you stay on message, which is very important.

When you must reprimand a volunteer, remember the following:

- Don't smile; you should not look like you are enjoying the discussion.
- Don't collect problems over time and then criticize on multiple fronts – act on a timely basis and focus on a single incident.
- Be specific in describing what was done wrong.
- Let the volunteer know that you feel disappointed.
- Put the reprimand in perspective – she has done better and you believe she can do better in the future.
- Don't repeat the reprimand.

Enforcing Boundaries on Volunteer Behavior

A common supervisory problem in volunteering has to do with enforcing role boundaries on the volunteer. This means ensuring that the volunteer does not engage in work that is not part of her official role description.

It may seem that a volunteer would naturally adhere to the duties listed in her role description but this is not the case. Volunteers are by their very nature activists and are more inclined to take action than stand back, especially when they see a problem. This is particularly true when it comes to needs of clients. The volunteer may think, "Well, I'm already helping them with this problem that I was originally here for, so helping them with that other problem is pretty easy, and I'm willing to do the work."

Crossing boundaries is actually more likely the more motivated the volunteer is. A boundary is essentially a line distinguishing what is OK for the volunteer to do versus what isn't OK. Boundaries are hard to draw exactly.

Boundaries are designed to protect volunteers both from entering into situations they are not qualified to handle safely and from losing control of their own personal lives. Boundaries are designed to protect clients and to show respect for their privacy and rights. Boundaries are designed to protect the SHIP by preventing its volunteers from doing work that is beyond the SHIP mission and beyond the competence of the volunteer.

"Crossing boundaries is actually more likely the more motivated the volunteer is."

Within the SHIP program, boundary issues may exist in several areas:

- Personal information that is shared by the volunteer with clients or by clients with the volunteer
- The precise services that will and will not be performed for clients
- Gifts or financial transactions between volunteers and clients
- The nature of ongoing relationships between volunteers and clients

So how do you restrain these powerful and natural instincts of the volunteer without destroying his motivation to continue volunteering?

Here are several ways:

1. Adopt and communicate to all volunteers a "non-abandonment" policy regarding client needs that do not fall into the normal work of the agency. Urge volunteers to bring these needs to you and tell them you will work to find a way to meet the needs, usually through referral to another agency. Make it clear to the volunteer that the agency will not "abandon" the client. It is crucial to maintain open communication with volunteers regarding these issues, and it is equally crucial they know you are on the same side as they are – each of you wants to do what it takes to help the client. If a volunteer ever feels the SHIP doesn't care about clients, she will be much more likely simply to act on her own and, eventually, to stop volunteering for the SHIP.

2. If you are not the volunteers' direct supervisor, alert supervisors to the possibility of boundary transgressions. Supervisors tend to focus more on what volunteers aren't doing as opposed to what they are doing in excess. Inform supervisors of the need to watch for volunteers who go too far. Inform supervisors of the types of situations that they might also need to watch for. Make sure that supervisors know that you need strict enforcement when it comes to boundary transgressions: the behavior needs to stop. Volunteers who are not willing to adhere to role boundaries need to be released.
3. Provide each volunteer with a clear explanation of why prohibited actions have been prohibited. Do not simply cite rules and refer to "policy." Explain why the SHIP has chosen not to provide some types of services. There are two generally accepted reasons:

    A. The SHIP isn't capable of doing a good job in the area.

    B. Some other agency exists to provide the help.

    You can also point out that in order to accomplish its specific mission the SHIP has had to make choices about the extent of coverage it can provide. The more volunteers connect to the mission of the agency the more likely they are to feel comfortable staying inside the boundaries of that mission.

4. Provide clear rules and procedures, with specific examples of prohibited actions, and build these into "what if" training scenarios for all volunteers. A volunteer is most likely to stray when he meets a new situation that has not been covered in any training discussion; the volunteer will then tend to act on his own "natural" instincts. As you encounter examples of volunteers acting out of bounds, collect them and use them as discussion scenarios during orientation and training. Think of the situations that volunteers encountered in the past that tempted them to transgress a boundary and then develop a discussion exercise around "What would you do if faced with…?" Over time this will build a set of collective wisdom about "right action" that can be emulated by new volunteers. In this way, you can reinforce the ethic of keeping within agency boundaries.

5. Build a sense of personal connection and bonding between the agency and the volunteer that will counterbalance the relationship between the volunteer and the client. This can be done by making volunteers feel like they are a part of the agency: including them in decisions, fostering a sense of identity with your agency operations. This can also be done by developing personal relationships between staff and volunteers. One warning, however, is that the most common bonding occurs between volunteers and their immediate supervisor, often the coordinator of volunteers. A clear danger is created when this bond is severed by the departure of the staff person with whom the volunteer has bonded. In this all-too-frequent instance, the volunteer will experience a sense of loss and will often replenish her sense of connectedness by turning to the client and seeking to strengthen that relationship.

The Positive Corrective Action Approach

If the volunteer does not respond to any of the approaches mentioned here, the coordinator of volunteers can either release the volunteer or take corrective action. If there is hope that the volunteer could start to perform at an acceptable level, corrective action is the best choice. This action must be taken in positively, however.

Strictly Avoid Destructive Action

If it is done negatively, the corrective action could be destructive. Any improvement in performance would come at a cost to the individual's self-confidence and self-image. It may also produce simmering resentment. This will usually poison the atmosphere and contribute to retention problems.

In a destructive corrective action encounter, the supervisor is judgmental, telling the volunteer what is wrong with him or threatening the person with dire consequences if he doesn't improve. It is destructive to criticize the volunteer's character or make assumptions about the volunteer's attitudes or motives. For example, statements such as "You've got a bad attitude" or "You're trying to run the program" should be strictly avoided. In such interactions, the supervisor accuses. Such behavior produces defensiveness and resentment and can only harm the SHIP program even more.

"It is destructive to criticize the volunteer's character or make assumptions about the volunteer's attitudes or motives."

To make the encounter productive, focus on what the volunteer can do differently. Any description of past performance should focus on specific behavior, such as "You were late to the presentation again," not critical statements about the volunteer as a person, traits he exhibits, or his motives.

Taking Positive Corrective Action

The positive corrective action approach contains six basic steps. These steps place the supervisor in the role of helper rather than accuser, and they place the responsibility on the volunteer.

Step One: Ask the volunteer to describe the unacceptable behavior.

The interaction should begin with a statement such as "How would you describe your performance (in this situation)?"

Sometimes this statement alone will clear up the performance problem. Consider the following example. A volunteer assigned to data entry frustrated her supervisor by making many errors. When asked to describe her performance, the volunteer said she thought it was very good and noted the quantity of work she produced. The supervisor then asked, "How would you evaluate the accuracy of the work you do?" The volunteer responded, "Well, sometimes I make mistakes, but when I do someone catches it and I correct it right away." It was obvious from her tone of voice that she saw nothing wrong with this system. The supervisor realized she had never explained that she expected the work to be done without error the first time. Once she clarified this, the performance problem disappeared.

On the other hand, sometimes a volunteer will not be able or willing to describe the problem behavior. In such cases, the supervisor will have to do that for the individual. If you face this situation, make sure you concentrate entirely on what the person did or did not do. Describe the behavior without judgment. Some examples include:

- "You were 20 minutes late today."
- "You didn't show up for your scheduled presentation."
- "You offered to deliver some groceries for a homebound client."
- "You told a client that the ABC Health Clinic should be avoided at all costs."
- "You made a commitment on behalf of the SHIP without telling us."
- "You erased all the volunteer files from the hard drive."

Step Two: Separate the behavior from the individual's worth as a person.

In talking with people about their unacceptable performance, make sure they know you are talking only about what they did, not who they are. If the volunteer is performing below her ability or if his performance has tailed off, you could say something like "That's not like you" or "I'm surprised." Say these things only if it is your true belief.

On the other hand, if the problematic behavior has become commonplace, you could say something like "I'm confused by this" or "I'm puzzled." These statements lead directly to step three.

Step Three: Say something positive about the person.

The purpose of this step is to diffuse the defensiveness that is a natural result of a corrective action encounter. It is hard for people to change when they are on defense. With this step, the goal is to praise people for a positive trait they possess and to validate who they are. Some examples:

- "You obviously care a lot about our beneficiaries."
- "You're a responsible worker."
- "You bring such enthusiasm to the program."

"If you can think of no positive traits the person possesses that contributes to their performance, you can always fall back on the statement "I believe you are capable of succeeding in this role."

Step Four: Ask the volunteer for a plan for improvement.

Ask the volunteer "Are you clear about what you should be doing?" "What will you do next time?" or "What can you do to fix it?" Make sure the plan he gives you is clear, specific, and easy to visualize. Get details. If he can't clearly picture himself doing something different, he won't be able to improve. Listen to any excuses but insist on the performance expectation. Ask how he will make sure he meets that expectation in the future. Although the plan must be acceptable to you, it must come from the volunteer.

This does not mean that you cannot have input into the plan, especially if you don't think the volunteer's plan will resolve the behavior. Suggest an alteration and then ask the volunteer how that would fit into his plan.

Step Five: Praise any improvement in performance.

Say "That's exactly how things should go" or "Your work is getting better every day!" But if the behavior is still unacceptable, repeat step four, asking how he will do even better the next time. As performance improves, make praise more difficult to earn.

Step Six: As performance improves, repeat step three.

Praise the behaviors that are starting to be exhibited. Such validations will enhance the self-esteem of the volunteer and make him feel good about his work.

Sometimes, regardless of your positivity, the problematic behavior may continue. If so, repeat the first four steps, explaining that you must see improved performance. Make sure the volunteer knows you are serious. If he still performs at an unacceptable level, replace him with a volunteer who can perform the role.

Fortunately, most of the supervisory experiences with volunteers will be pleasant, and you will spend more time helping dedicated volunteers maximize their performance. It is good, however, to be prepared for the exception. It is the responsibility of the coordinator of volunteers to protect the program and the other volunteers by dealing quickly and decisively with problematic volunteer behavior. Failing to correct problems gives a clear sign to staff and other volunteers that you are unwilling to enforce quality control standards.

Summary: Steps to Positive Corrective Action

- ❑ **Step One:** Get the volunteer to describe the unacceptable behavior.
- ❑ **Step Two:** Separate the behavior from the individual's worth as a person.
- ❑ **Step Three:** Say something positive about the person.
- ❑ **Step Four:** Ask the volunteer for a plan for improvement.
- ❑ **Step Five:** Give praise for any improvement in performance.
- ❑ **Step Six:** As performance improves, repeat step three.

Not Becoming Part of the Problem Yourself

It is critical not to become a contributing part of the problem – something that is easier to do than you may think.

Managers will often avoid dealing with problematic volunteer behaviors for one or more of the following reasons:

1. You think it reflects badly on you and your supervisory skill.
2. You want to be nice and think that volunteers should be allowed latitude.
3. You're friends with the volunteer and don't want to appear to be criticizing her.
4. You're wrapped up in your own work and don't need any more problems to deal with.
5. You feel sorry for the volunteer, thinking the lack of performance is not really her fault.

Avoiding problems usually allows them to build into more complex and troublesome situations. Being a supervisor means being willing to deal with performance problems.

Here are some common ways supervisors or managers may exacerbate problems and the remedies:

- **Overreacting**
    - Harboring some resentment for past transgressions and then lashing out over something small.
    - **Instead:** Deal with all issues as they occur, rather than letting things build up.

- **Whining**
    - Complaining to others about the problem rather than addressing it directly dealing with the person involved.
    - **Instead:** Though it's OK to seek the professional advice of co-workers, they can't solve the problem. If you want the volunteer to change a behavior you must talk directly with the volunteer.

- **Lecturing**
  - Lecturing rather than talking with a volunteer conveys disrespect.
  - **Instead:** SHIP volunteers are experienced and mature adults and should be treated accordingly.
- **"Nuking"**
  - Punishing, and in a retaliatory, aggressive manner.
  - **Instead:** Practice the "measured response" technique – apply only enough pressure to solve the problem you're dealing with today. Start with a minimal level of reaction and escalate firmness only if necessary.

Positive Redirection

The positive corrective action steps outlined above advocate a calmer, more rational, and more progressive approach to performance management. They view the supervisor as a coach and consultant to volunteers, recognizing that none of us are perfect, all of us have and will cause problems occasionally and most of us are amenable to improvement if approached correctly.

In keeping with that positive approach, it is crucial to remember that many situations that appear as problems may actually be resolved rather painlessly. Volunteers can also be supported to succeed through re-direction, using one or more of the following techniques.

- **Re-supervise**

  You may have a volunteer who doesn't understand the rules or that they must be followed. This can be a problem with young volunteers, for example, some of whom automatically "test" the rules as part of their self-expression. It may also occur with mature volunteers who formerly held positions of authority and want to see whether they are still in charge. Enforcement may end the problem.

- **Reassign**

  Transfer the volunteer to a new role. You may, on the basis of a short interview, have misread her skills or inclinations. She may simply not be getting along with the staff or other volunteers with whom she is working. Try her in a new setting and see what happens.

- **Retrain**

  Send the volunteer back for additional education. Some people take longer than others to learn new techniques. Some may require a different training approach, such as one-on-one mentoring rather than classroom lectures. If the problem is lack of knowledge rather than lack of motivation, work to provide the knowledge.

- **Revitalize**

  If a long-time volunteer's performance starts to decline, he may just need a rest. This is particularly true with volunteers who have intense assignments, such as one-to-one work with troubled clients. In such cases volunteers may not realize or admit they're burned out. Give them a sabbatical and let them recharge, or transfer them temporarily to something that is less emotionally draining.

- **Refer**

  Maybe the volunteer's needs can be better met by volunteering in a different department at your organization or for another organization altogether. You could refer her to the local volunteer center, or your SHIP could consider setting up an exchange program with a sister agency. Some volunteers will thrive on this type of variety.

- **Retire**

  Recognize that some volunteers may no longer be able to do the work they once could and may even be a danger to themselves and to others. Give them the honor they deserve and ensure that they don't end their volunteer careers in a way they will regret. Help them departing with dignity before the situation becomes a crisis.

Releasing a Volunteer from Service

Prevention is of course the best solution. Ensure you are putting enough time and energy into the volunteer program. Always remember that interviewing is the key quality control element in volunteer management, in addition to screening. Careful attention to such processes allows you to avoid improper volunteer placement in the first place.

However, if all of the positive corrective action and redirection methods have been tried and the volunteer is still unable to meet the expectations in performance or behavior required by the SHIP, releasing the volunteer from SHIP service becomes a necessity.

Establishing a Supportive Release Process

A recurrent nightmare of coordinators of volunteers is encountering a situation where they may have to consider "firing" a volunteer. For many, this prospect creates severe stress, both over the appropriateness of the action and over fear of possible legal and political consequences. In a Foster Grandparents survey across 23 communities, 82 percent of responding coordinators of volunteers rated the decision to terminate a volunteer as being a "difficult or very difficult issue" for them. More than 60 percent reported delaying dealing with the problem and more than 73 percent of managers did not have a termination plan or policy to guide them in the decision.

Volunteer Program Management experts and authors, Jarene Frances Lee and Julia M. Catagnus describe the multiple dilemmas facing the coordinator of volunteers in a termination decision:

> *Failing to act affects your reputation and the reputation of volunteers, and may put your organization at risk. Terminating the volunteer may also affect your reputation and may result in a bitter ending for a volunteer whose affiliation was valued by the organization and was, for the volunteer, a source of great pride. There are no easy answers. . .*

This reluctance probably occurs because most coordinators of volunteers are people-oriented and respect the willingness of others to help. There is particular difficulty in addressing situations where the decision to terminate is not because of a "fault" of the volunteer but is instead due to ill health or a change in program needs. Where volunteering is viewed as a benefit to the volunteer (such as in some volunteer programs for retired citizens), people have difficulty with termination because they mentally classify volunteers as "clients," and it is difficult to justify terminating a client.

One important thing to remember is that the decision to release a volunteer is not a "judgment" of the volunteer, his character, or any other aspect of his being. It is simply recognition that in the immediate circumstances the relationship has reached a point where it is not productive. Just as the volunteer may reach this determination and resign, so, too, may the agency reach a similar determination and ask the volunteer to leave. The underlying cause of the situation may, in truth, be the fault of the agency or the volunteer. Often, however, it is the "fault" of neither – things just didn't work out. Not all volunteers can fit into all settings. Not all agencies can prove productive for all volunteers.

"Remember that the decision to release a volunteer is not a "judgment" of the volunteer, his character, or any other aspect of his being."

Getting Philosophically Ready to Release a Volunteer

The initial requirement in a system for handling the release of volunteers is making the decision that release is indeed a necessary action in some circumstances. There are several rationales.

1. One is that the ability to deliver quality service to the clients of the SHIP is the bottom line. Any barrier to that delivery is not allowable. This standard applies to both paid and unpaid staff.

2. A second reason has to do with giving meaning and value to volunteer service. Denying that there is a "right" and a "wrong" way to perform a volunteer role conveys the impression that volunteer work is irrelevant and insignificant. By neglecting to enforce quality, the other volunteers who are performing appropriately may conclude that the organization believes their work to be meaningless.

Developing a System for Making Release Decisions

If you do encounter a situation where none of the positive action alternatives worked, having a system developed in advance will help the coordinator of volunteers in making and in justifying the decision to release a volunteer. Consider a system that incorporates three essential stages:

1. **Forewarning/notice**

   The first stage is developing clear policies and information about the prospect of releasing volunteers. To do this you need the following:

- *A set of official personnel policies regarding the involvement of volunteers.*

  It is especially important to have policies on probation, suspension, and termination. The policies should also outline the procedures for disciplinary action. The policies should be similar, if not identical, to those used with paid staff

- *A system for informing volunteers, in advance, about these policies.*

  Volunteer handbooks or manuals should describe the policy and its procedures. Volunteer orientations should discuss the policies and provide examples of requirements and unacceptable behavior.

- *A mechanism for relating these policies to each volunteer position.*

  The Role description for the volunteer should explain the requirements of the position and thus contain measurable objectives for determining whether or not the work is accomplished satisfactorily.

The intent of this stage is to ensure that volunteers are given adequate information regarding expectations and policies.

2. Investigation/determination

The second stage is developing a process for determining whether the volunteer has broken the rules. This implies having a fair investigator take the time to examine the situation and reach a decision that something has been done wrongly. You should never release a volunteer "on the spot," regardless of the infraction. "Instant firing" will not allow you to determine whether there are extenuating circumstances. This is why a suspension policy is so important.

In this stage the coordinator of volunteers establishes a process for reviewing the performance of volunteers and recording problems. It should be part of the regular evaluation process. Volunteers whose performance is unsatisfactory are told of their deficiency, counseled on improving their work, and then re-evaluated. Failure to conform to the quality standard over time can become grounds for termination. In cases where the unsatisfactory performance is not incremental but is substantial in nature (such as inappropriate relations with a client or breach of confidentiality), proof is needed. This might be testimony from other volunteers, staff, or the client.

During this part of the process, the coordinator of volunteers also considers

whether any of the alternatives to termination described previously would be more appropriate and investigates whether the cause of the behavior may be linked to a failure in management. These might include:

- Failure to provide an adequate or clear standard of behavior or performance in this area.
- Failure to place the volunteer in a position for which she is qualified.
- Failure to provide adequate information or equipment for the volunteer to perform his work.
- Failure to supervise and provide instructional feedback to the volunteer.

3. **Application**

This final stage requires that the coordinator of volunteers do a fair job of enforcing the system. It requires equal and fair application of the rules (no playing favorites), appropriate penalties (graduated to the severity of the offense) and, if possible, a review process so that the decision does not look personal.

The three stages above are guides for SHIPs, but keep in mind that stages may vary from organization to organization. 4-H, for example, has an effective system with four ascending steps:

1. An official warning letter to the volunteer indicating specific information or areas that need improvement
2. Follow-up counseling along with a letter of documentation
3. Probation with explicit goals
4. Termination

Advantages to Establishing a System

It helps the coordinator of volunteers reach the right decision and feel comfortable about making that decision. If properly followed, the system is fair to both the volunteer and the agency. It also allows the coordinator to divert to a less drastic solution where appropriate.

Having a system also helps develop a case for releasing a volunteer, which can be used to explain the decision to others, both internally and externally. A side effect of this systematic approach is that many problem volunteers decide voluntarily to

resign rather than face the inevitable and seemingly inexorable conclusion of the dismissal process. This allows the volunteer to "save face," which makes further reactions against the agency much less likely. One consequence to be avoided is an outraged former volunteer who decides to make perceived injustices public.

Documenting the Case for Release

While lawsuits by volunteers against organizations who release them from service are rare, it is still essential to protect the integrity of your organization by documenting your process. Ensure you not only have a good reason for releasing a volunteer but also have the documentation to establish the validity of that reason to others. Key elements in this documentation are:

1. Records of the deficiencies in the volunteer's performance, giving as precise a description as possible of specific, observable behavior that violates agency rules or procedures.
2. Written records of the times you speak to the volunteer about her conduct or performance, with indications of the steps she agrees to take to correct the problem and notes on the timeframe for any change in behavior.
3. Records of statements by others about the conduct or performance of the volunteer, preferably signed by the individual giving the testimony.
4. Records of the steps in the evaluation and assessment process, including warnings to the volunteer, performance agreements, and formal evaluation forms. Give the volunteer copies of all memos directed to him. It is not necessary to give him a copy of memorandum that you write to the personnel file or to others about his behavior.

You may discover behavior that would prompt you to release a volunteer, but in reviewing her personnel file notice that all other documentation about her past behavior is either missing or else contains no criticism. In this case, you should be cautious and take the time to see whether tough action is warranted. For example, if your predecessor did not keep records, you may be in the dark about the extent or duration of a problem. You are also less able to build a case for resolving the problem. Documentation helps everyone. For example, if you move on from your position as the coordinator of volunteers, leaving a paper trail assists your successor.

Conducting the Release Meeting

Regardless of how the decision to release a volunteer is reached, someone has must convey that decision to the volunteer. This will never be a pleasant experience, but here are some tips that may help:

Conduct the meeting in a private setting

This will preserve your dignity and that of the volunteer. The major reason for inviting witnesses is if you have serious questions about the psychological stability of the volunteer and are worried about your safety.

Be quick, direct, and absolute

Don't beat around the bush. It is embarrassing to have the volunteer show up for work the next day because he didn't get the hint. Practice the exact words you will use, and make sure they are unequivocal. Do not back down, even if you want to preserve your image as a "nice person."

Announce, don't argue

The purpose of the meeting is simply, and solely, to communicate to the volunteer that she is being released from the SHIP. This meeting is not to re-discuss and re-argue the decision because, if you have followed the system, all the arguments will already have been heard. You should also avoid arguing to ensure you don't put your foot in your mouth. Expect the volunteer to vent but keep quiet and do not respond, especially emotionally. Remember the old adage: "A closed mouth gathers no feet."

Do not attempt to counsel

If counseling were an option, you would not be having this meeting. Face reality; at this point you are not volunteer's friend. Any attempt to appear so is misguided and insulting. Giving advice demeans the volunteer and makes it more likely that he will experience additional anger. It adds insult to injury. It also wastes your time.

Be prepared to end the discussion

You want to allow released volunteers some time to vent their emotions but at some point you may need to announce that the discussion is over and that it is time for them to depart.

Follow-up

After the meeting write a letter to the volunteer reiterating the decision and informing him or her of any departure details. Make sure you also follow up with others. Inform

staff and clients of the change in status, though you need not inform them of the reasons behind the change.

In particular, make sure that clients with a long relationship with the volunteer are informed of the new volunteer to whom they are assigned and work to foster that new relationship as quickly as possible. The intent of these actions is to ensure interactions involving the released volunteer and clients are less likely to happen.

Learning from Mistakes

Problematic volunteer management situations, up to and including releasing a volunteer from service are, in part, always a sign of a mistake in volunteer management, usually a result of difficulties in interviewing, placing, or supervising a particular individual. As such, these incidents, while painful, provide an opportunity to examine and refine an organization's system for working with volunteers. You might want to consider the wise advice of Sarah Jane Rehnborg of the University of Texas:

> *. . . Once you have taken action and have assessed the consequences, you may also want to ask what you have learned from this situation that will reduce the likelihood of a similar situation occurring in the future.*

Chapter 8: Retaining and Recognizing Volunteers

Why Retention is Important

Retaining your volunteers is the key to success. There is no point in being good at recruitment if you cannot keep volunteers coming back. Recruitment is a solution to the problem of not having enough volunteers; retention is a way to avoid the problem altogether. This chapter looks at some aspects of retaining and recognizing volunteers.

Volunteers choose to stop volunteering for many reasons. Some are beyond the control of an organization or of the volunteer. Others are not. A 1998 study in the United States undertaken by the United Parcel Service Foundation discovered that after "conflicts with more pressing demands" (65 percent), poor volunteer management was the most frequent reason cited to explain why people stop volunteering:

- Charity was not well managed: 26 percent
- Charity did not use volunteers' time well: 23 percent
- Charity did not use volunteers' talents well: 18 percent
- Volunteers' tasks were not clearly defined: 16 percent
- Volunteers were not thanked: 9 percent

Their conclusion was straightforward:

> *Poor volunteer management practices result in more lost volunteers than people losing interest because of changing personal or family needs. The best way for volunteer organizations to receive more hours of volunteer service is to be careful managers of the time already being volunteered by people of all ages and from all strata of our volunteer society.*

"…After 'conflicts with more pressing demands' (65 percent), poor volunteer management was the most frequent reason cited to explain why people stop volunteering."

Why Volunteers Quit

The Corporation for National and Community Service listed the following factors in volunteers' decisions to stop volunteering with an organization:

- Disorganized volunteer experiences
- Unprepared and untrained leaders
- Lack of recognition
- Insufficient materials
- Absence of team motivation
- Mismatched skills and interest with a task assignment
- Lack of proper training
- Restrictive volunteer assignments

Although "not having enough time" is the usual answer that volunteers will give for leaving a program, this is often an excuse. When people really want to do something in their lives, they make the time.

Why Volunteers Stay

Success in volunteer involvement requires providing a rewarding experience both for volunteers and for the organization in which they serve. We know from many surveys that today's volunteers are looking for some specific returns when donating time:

- A smooth, hassle-free experience
- Flexibility in the use of their time
- Interesting and challenging work
- A supportive environment
- The opportunity to learn and apply their skills and knowledge
- The opportunity to do work worth doing
- The opportunity to work as part of a team

Programs that can meet these motivational needs will be able to recruit and retain volunteers; programs that do not will find it increasingly difficult to maintain their volunteer workforce. In a sense, these expectations create the basis of what is called a "motivational paycheck" for the volunteers, one that is as important and vital to them as the monetary paycheck given to paid staff.

The currency of volunteering is the work, the rewards, and the great feelings of helpfulness. It is this distinction that leads most volunteers to need more feedback and more day-to-day recognition and appreciation for their contributions than paid employees. A truism of volunteering is that "no one volunteers to fail." Volunteers can have a sense of failure if they do not receive feedback on their work (including advice on how to do better) or if they do not receive recognition for their work. After all, "if no one is even paying attention to what I am doing doesn't this mean I'm not making a contribution to what we're trying to accomplish?"

Motivational Paycheck:

"The currency of volunteering is the work, the rewards, and the great feelings of helpfulness."

Developing a Volunteer Growth Plan

One method for fostering growth is to help volunteers reflect on their current volunteer experiences and then help them to focus on what else they would like to achieve while volunteering. In a sense this involves helping them develop their own "volunteer growth plan."

The following questions are designed to help you talk with volunteers about their own growth and development in their volunteer position. Volunteer's answers to your questions will give you insight into their level of satisfaction with their role and also how they would be better motivated. The questions are intended as a guide for discussion, not as a form to be completed and ignored.

Work Satisfaction Questions

1. What were you hoping to accomplish in your volunteer work this year?
2. What were your greatest accomplishments while volunteering this year?
3. What was your greatest frustration while volunteering this year?
4. What would you do differently if you were to do your volunteer work over again this year?
5. What strengths, skills, or talents did you discover or strengthen this year?
6. How challenging and interesting do you find your work at this time?

Personal Satisfaction Questions

1. What do you find most rewarding about volunteering here?
2. What new friendships did you make here this year?
3. How well do you think we are accomplishing our mission?
4. What is your vision for what we ought to be doing to be more successful in the next five years?

"Volunteer's answers to your questions will give you insight into their level of satisfaction with their role and also how they would be better motivated."

Future Growth Questions

1. What do you want to accomplish in your work next year?
2. What do you want to accomplish personally next year?
3. How can we best help you accomplish these goals?
4. What kind of volunteer work would most help you attain these goals?
5. What training or experience can we offer you to make you better able to do your work?
6. How can we make your time here more fulfilling?

Talking through these areas with your volunteers will help both them and you shape the kind of volunteering experience that will keep them engaged and productive for many years.

Recognizing Volunteers

Volunteers must receive a sense of appreciation and reward for their contribution. This sense can be conveyed through a number of processes, including both formal and informal recognition systems.

Formal Recognition Systems

Formal recognition systems are comprised of the awards, certificates, plaques, pins, and recognition dinners or receptions to honor volunteer achievement. Many organizations hold an annual ceremony in which individual volunteers are singled out for their achievements.

In determining whether to establish such a formal ceremony, consider the following:

- Is it authentic and not stale or mechanical?
- Is this being done wholly in the spirit of honoring the volunteer, keeping their needs in mind, rather than focusing on the staff and their desire to show appreciation?
- Does it fit? Would the volunteers feel better if you spent the time and money on the needs of the clients rather than on an obligatory event?
- Can you make it a sense of celebration and a builder of team identity?

Formal recognition systems are helpful mainly in satisfying some volunteers' need for community approval but have little impact (and occasionally have a negative impact) on volunteers whose primary focus is helping the clientele. These volunteers may very well feel more motivated and honored by a system that recognizes the achievements of "their" clients while also recognizing the volunteer's contribution toward those achievements.

Informal Recognition Practices

Effective volunteer recognition also occurs in the day-to-day interchange between volunteers and the organization when staff express their sincere appreciation for a volunteer's efforts. This type of recognition is particularly powerful because it is much more frequent – a once-a-year event cannot compare to 365 days of good working relationships. Informal recognition can begin early. A card of welcome sent to a new volunteer or a small welcome party conveys an immediate sense of appreciation.

Ideas for Recognition

Here are some examples of different levels of recognition activity, both formal and informal:

Daily Means of Providing Recognition:

- Saying "thank you"
- Telling them they did a good job
- Inviting them to join you for coffee
- Asking for their opinions
- Greeting them in a friendly way
- Showing interest in their personal interests or asking about their families
- Bragging about them to others (in their presence)
- Jotting small thank-you notes to them
- Having a refreshment with them after work
- Saying something positive about their personal qualities
- Ensuring that volunteers receive equal treatment to that of staff

Intermediate Means of Recognition:

- Involving volunteers in decisions that affect them
- Providing refreshments at volunteer meetings
- Sending a note of appreciation to volunteers' families
- Letting them put their names on the products they produce
- Writing them a letter of commendation (and keep it on file for later use)
- Inviting them to be on important task forces or committees
- Posting graphic displays, showing progress toward targets
- Having them present their results to higher-ups
- Writing articles about them for newsletters or newspapers
- Having your agency or project director write them a letter of thanks

- Celebrating major accomplishments
- Featuring them on your website with news of their accomplishments
- Sharing articles and cartoons they might be interested in
- Involving them in informal chats with organization leadership
- Featuring their success stories as examples in volunteer training
- Posting photos of volunteers at work on an office bulletin board

Major Means of Providing Recognition:

- Giving a plaque, certificate, or trophy for being best volunteer, most improved results, etc.
- Encouraging volunteers to write a report about some situation they dealt with
- Updating and improving the equipment they need to do their work
- Allowing volunteers to increase their skills by attending training
- Recommending the volunteer for promotion to a more responsible job
- Celebrating the volunteer's anniversary with the organization
- Getting their picture in the paper for outstanding accomplishment
- Getting a local radio or TV station to mention or interview them
- Giving additional responsibilities and a new title
- Purchasing ads in the media to thank them
- Putting up a banner celebrating a major accomplishment
- Honoring them for years of service to the organization

- Improving their office space
- Enlisting them to train staff and other volunteers
- Involving them in project planning processes

If All Else Fails, Do Things Correctly

When volunteers end their service to an organization, they often will say it is because their life is very busy, that they have other commitments, that they just don't have the time. These excuses should be treated as such. They are commonly a substitute for the volunteer conveying more unpleasant facts: that the volunteer experience is unrewarding, that volunteering is too much of a hassle, or that the volunteer does not trust the organization. In fact, if the volunteer experience is sufficiently compelling, people will make the time to volunteer.

The final answer to volunteer retention and recognition is quite simple: Operate a well-managed program. Volunteers, like the rest of us, tend to make rational decisions about the allocation of their time; they will strive to spend it in settings where they obtain value. This value may be the social aspects, the work objectives, the situational settings, or a combination. **Programs that enable volunteers to do good work in a good setting with good people are uniquely positioned to provide this sense of value and accomplishment and often can do so in ways that paid work settings cannot.**

The principles of good volunteer management described throughout this manual outline actions that can enable a volunteer program to provide this positive environment.

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None