

Evaluation of Volunteer Efforts

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Introduction

Because time, money, and other resources are expended on the involvement of volunteers—by both the recipient organization and the volunteers themselves—it is good management practice to evaluate whether the expense is justified. It is also important to assess what volunteers accomplish and how effective they are. This information is of special interest to volunteers as well as managers, since no one wants to devote time and energy to something without impact. The issue of volunteer evaluation is generic and is very important to arts managers.

The volunteer component is often overlooked when an organization conducts an internal evaluation study. Since most of the services volunteers provide are intertwined with the work of employees, the volunteer program must be included in an evaluation to obtain a complete picture of an organization's effectiveness.

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One of the reasons volunteers are often left out of agency evaluations is that no goals or objectives have been articulated for the volunteer program. Volunteers are viewed as useful but peripheral additions to the organization's basic services. It is assumed that volunteer worth is somehow self-evident, needing no further assessment. If goals and objectives for volunteers are identified, however, it becomes logical to assess whether or not they were achieved. This process also provides more meaningful long-term recognition for the volunteers.

One of the least creative questions posed to volunteer program leaders is "How many volunteers do we have, and how many hours did they give us this year?" Too often this is the extent of program "evaluation" for the volunteer component. A tally of hours served without analysis of what was accomplished is virtually worthless, as the quantity of involvement rarely, if ever, demonstrates the quality of performance.

This same principle holds true for assessing each individual volunteer's work. Recognition based solely on hours clocked is impersonal and nonmotivating. Many organizations are reluctant to evaluate individual volunteers because of a mistaken belief that gratitude for donated services must override concern for whether or not such services are worthwhile, but it should be recognized that *every volunteer wants to perform effectively*. Examining each volunteer's contribution is one way to demonstrate that volunteer services are taken seriously and that the organization wants to make sure each person's efforts are productive.

Individual volunteer performance assessment is connected to employee performance assessment just as volunteer program evaluation is connected to the overall organization evaluation. Some similarity needs to exist between the standards to which both employees and volunteers are held. In the arts, reluctance to do an assessment often exists because of a blurring of lines between "creative expression" and "productivity." Evaluation must be thought of as an opportunity to praise as well as criticize and as a chance to be supportive to all workers who are doing their jobs effectively.

Both programmatic and individual evaluation, when done correctly, become a two-way process, providing a forum for feedback from all parties. While evaluation examines actions that occurred in the past, its major purpose is to plan for the future. The process is inherently positive and enables everyone to move forward together.

Volunteer Program Evaluation

There are many approaches to program evaluation. Periodic informal evaluations happen naturally as an aspect of good management. For example, if a new project is established, its pioneer participants are likely

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to meet after a few months to discuss its progress. At some point, however, the organization should move past "this is how we *think* or *feel* things are going" and attempt to study what is occurring more objectively. This is the purpose of regular formal evaluation studies. A formal evaluation begins with a review of the volunteer program's stated goals and objectives and assesses whether and how these were met—and what unexpected accomplishments might have occurred.

If the volunteer program's goals and objectives were thoughtfully worded, it should be relatively easy to determine if they were met. For example, if at the start of the year the program wanted "to involve at least five volunteers from the immediate neighborhood surrounding our facility," it should be possible to find documentation of who was recruited this year, where each person lives, and whether five of the new volunteers live within a few blocks of the facility. Thus, there is a major correlation between goals and objectives, the evaluation process, and ongoing record-keeping. Without records kept on a current basis, there often is no way to gather needed data. If an organization intends to conduct an evaluation at the end of the year, it is necessary to set up systems to collect the right data from the beginning of the project. Some data may only need to be collected for one year—long enough to assess a specific question.

The major problem with evaluation by objectives is that it is insufficient to ask only "Did we meet our goals?" It is equally important to discover *how* those goals were met—the quality of performance or service—and whether they were the right or best goals. This creates the need for an evaluation study that involves asking people for their opinions.

An annual evaluation in an arts organization might analyze volunteer program performance in several areas.

1. The actual quantity and quality of the work done by volunteers in each assignment category;
2. Activities that are so vital they deserve additional support, and those that need improvement;
3. Gaps in needed services, and volunteer assignments that are no longer pertinent;
4. The accomplishments of the volunteer management team, including such overview questions as the demographic makeup of the volunteer corps, number and type of recruitment outreach efforts, etc.;
5. The type and degree of service provided to the salaried staff by volunteers and/or the volunteer program office; and
6. The benefits to the organization as a whole from volunteer involvement.

Some specific questions that could be asked to assess the contribution of volunteers are similar to those asked about the work of employees. In addition, some other avenues of inquiry can help identify the value of volunteers.

1. Have our visitors/audience expressed any awareness of, appreciation for, or comments about our volunteers?
2. What were we able to do more of this year than last because of help from volunteers?
3. What did volunteers free staff to do?
4. What innovations or experiments were we able to attempt this year because volunteers agreed to test something new?
5. In which assignments did we have the most turnover and why? Which assignments were the most popular with volunteers and why?
6. Has our public image changed, and can we trace any of this change to the impact of volunteers?
7. Is our volunteer corps representative of the community/public we serve?
8. Have salaried staff members measurably developed their supervisory skills as a result of working with volunteers?

Questions such as these will provide information that immediately translates into management decisions. The data gathered can be used to uncover training needs, recruitment strategies, and service deserving recognition.

In designing an evaluation, choices must be made, as it is impossible to assess every aspect of an organization or program all at once. Certain priority areas should be selected each year to receive special attention in the evaluation study. For example, one year the organization might assess the value of the volunteer orientation session, the difference volunteers make to young visitors, and the feelings of volunteers concerning the annual recognition event. Other aspects of the volunteer program might be covered by asking, "What else do you want to tell us?", but these three areas will each be analyzed in depth through several specific questions. The following year, different priorities can be studied, with perhaps one or two follow-up questions on the previous year's areas of focus to see if changes have been noticed.

Some organizations hire an outside evaluator or utilize a voluntary action center to conduct the assessment. In such a case, the volunteer program leader should meet with the evaluator and express his/her managerial concerns. The evaluation should be designed to elicit data that will affect management decisions, and no outside consultant or serv-

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ice organization can determine what the needs are. The role of the evaluator is to find the best (and most objective) way to get the information requested.

If the evaluation is to be done in-house, the question of who should do it arises. One recommendation is to recruit an evaluation team comprised of representatives of the paid staff and the volunteers. Members of the public served, someone from top administration, and a volunteer from the board of directors might also be included. The team should not be too large but should be diverse enough to ensure that the data collected will be analyzed from several perspectives. The goal is to elicit open and honest feedback. The priority areas to be evaluated will suggest who might influence the results if they are the ones asking the questions.

The evaluation team's first role is to design the evaluation study itself. This means determining the following.

1. Who will be the audience for the final evaluation report? Will the report be shown to a funding source? The public? Or will it be used primarily as an internal guide to management? The answer to this question will affect the areas to be studied and how the final report will be presented.

2. What program areas are the priorities for evaluation this year and why?

3. What is being planned by the organization in the coming year that will involve volunteers? What, therefore, should be learned now about past activities that will prove helpful in addressing this upcoming activity?

4. What are the available means for conducting an evaluation? Is there money for a mailed survey? Are there meetings scheduled during which a questionnaire might be administered on site to groups of staff, volunteers, or members of the public? Are there volunteers or employees available to conduct interviews?

5. Given the program areas to be assessed, who might be the best sources of information? Choices include

- Volunteers: active and/or inactive (Note: it is sometimes possible to learn more from people who left a volunteer assignment than from volunteers still in it.);
- Employees: those who supervise volunteers and those who do not;
- Administration: including board members (who are also volunteers);
- The organization's audience or visitors: present and/or past. This might include spot checking people in the "General Membership" category;

- The public (community): in general, or special segments such as specific age groups, geographic areas, or agencies/businesses with concerns related to the organization's mission;
- Other arts organizations;
- The leaders of the volunteer program;
- Written reference materials: census reports, previous annual reports, etc.

6. Having selected the sources, how will the focus be chosen? Will we try to reach everyone, or will a sample be selected?

7. What questions should be asked? How can they be asked in the most neutral, nonleading form so the answers will be as objective as possible? Also, scaling of questions should ensure that the answers are comparable.

8. Will the method of questioning be a written questionnaire? A personal interview? Group discussions? The facilitator should be impartial and trained not to skew results.

9. Will the questionnaire be mailed or administered in person?

10. Who will administer the questionnaire? The volunteer program staff? Volunteers? The evaluation team? Specially recruited, outside volunteers, such as students from a college course on statistics?

11. Once data are obtained, how will they be collated and analyzed to ensure that the right conclusions are reached? Recognize that data can be interpreted in many different ways.

The subject of how to design an effective evaluation is too complex to discuss here, but the questions just outlined should provide a starting point from which to seek the necessary assistance. In discussing the evaluation of a volunteer program, the program leader can recruit an expert consultant from a corporation, marketing firm, or business school who is skilled in evaluation techniques to serve as advisor to the evaluation team.

Once the evaluation has been completed, there are many uses for the final report. First, the evaluation should be shared with all volunteers so they can learn of their cumulative achievements and impact (which is true recognition) and also understand the concerns to be addressed in the coming months (which encourages their ownership of the program and enlists their help in finding solutions). Second, the evaluation can be shown to current and potential funders to illustrate that their dollars were leveraged by volunteers into services worth far more than the value of the original cash contribution. Managerially, the evaluation can be translated into developing training programs to improve the skills shown

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to be weak, launching recruitment campaigns to locate volunteers with targeted skills, and creating better promotion opportunities for experienced volunteers. The report is as important for what it shows is being done right as for the weak areas it uncovers. Finally, the evaluation can demonstrate to resistant salaried staff that volunteers are achieving important things and should be better supported.

One caveat should be offered to managers: be cautious of drawing comparisons between the work of volunteers and that of employees. Each group should be handling assignments that are tangibly different; therefore, their evaluations should be considered separately. Talented volunteers may become threatening to the salaried staff who might worry about their job security if the work of volunteers is praised in comparison. Arts organizations need both their employees and their volunteers, and any evaluation should recognize the achievements of both groups.

One reason often cited for involving volunteers is to assess the community perspective. Volunteers are both outsiders and insiders, and they represent the point of view of the public. Thus, any program evaluation should be designed to elicit maximum feedback from the volunteers. It offers a regular opportunity to learn what volunteers—as representatives of the public—think about the organization's programs, services, and other elements.

As with any program evaluation, evaluating the volunteer program is worth the effort only if the results of the assessment are analyzed and plans are developed to implement necessary changes. If done correctly, an evaluation will indicate areas of strength as well as weakness, since improvements might come simply from doing more of what is already being done effectively. From the volunteer management perspective, the importance of evaluation is the need to ensure that volunteers are assigned to work that genuinely requires attention so their efforts are not wasted on useless activities.

Ongoing Assessment

Apart from a periodic evaluation of the volunteer program, an organization should want to know throughout the year whether volunteers are being effective and whether the most supportive working environment for volunteers is being provided. Gaining this information involves requiring reports from the director of volunteers with the same frequency as reports from other department heads, usually monthly. The data in these reports will be compiled from statistics maintained in the volunteer office and from information documented by each unit/department in which volunteers are active. Executive directors of arts organizations should read such reports carefully. Volunteers often far outnumber

an organization's employees, and data concerning volunteers can be quite revealing.

In studying regular reports, managers should look for the rate of turnover in specific assignment categories, accomplishments of short-term versus long-term volunteers, and assignments that have been vacant for an unusually long period of time. These data may alert the administrator to trouble spots. For example, if turnover seems to occur monthly in a particular work area, there may be a problem with the paid supervisory staff or the physical work environment there.

As with all data, numbers alone do not tell the whole story. Some statistics reflect normal variables in the operation of a volunteer program, such as anticipated high rates of turnover in particular months (for example, student volunteers leaving in May or June). Other vacancies may demonstrate careful screening by the director of volunteers, who is willing to allow vacancies to exist for a time rather than filling slots with inappropriate volunteers. This situation might be indicated in the report by a higher number of screening interviews each month than the number of new volunteers joining the organization.

Ongoing volunteer program reports should give the organization useful information such as

- The profile of the organization's volunteers: age ranges, racial distribution, neighborhoods represented, percentage of men and women;
- Exactly what volunteers do (both continuing assignments and special projects in any month);
- Which work areas do and do not utilize volunteers and why;
- Where the biggest turnover of volunteers occurs and why;
- The number, type, and results of public relations and community contacts made by the volunteer program office in any month; and
- Observations or suggestions made by volunteers that might be useful in management decisionmaking.

Much of this information is useful in ongoing publicity and fundraising efforts as well as in internal managing.

Evaluating the Director of Volunteers

The evaluation of a volunteer program is not the same as an evaluation of the director of volunteers. It is justifiable to assess the competence and achievements of the leader of the volunteer program by examining the way the program is managed, but the achievements of the volunteers are not necessarily the reflection—nor the fault—of the director of volunteers.

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A great deal depends on the organization's expectations of the position of director of volunteers. If all that is wanted is for the volunteer program to be "maintained," then little creativity or vision are needed from the program leader. If volunteers are truly valued, however, the director of volunteers should be assessed as a contributing member of the organization's administrative team.

The director of volunteers should be responsible for keeping informed about volunteerism in general. Is s/he aware of what is happening with citizen participation in other types of settings? Can s/he express long-range goals for the volunteer program and predict changes that might occur in the future? Is s/he aware of trends in the arts and how these might affect the organization's ongoing needs for volunteer involvement?

Individual Volunteer Performance Assessment

Individual volunteer performance assessment is part of the spectrum of good volunteer program management techniques. It begins with having accurate volunteer job descriptions. A person can be held responsible for a specific set of tasks only if s/he clearly agreed to them when joining the organization. One of the major reasons groups face problems with ineffective volunteers is that no one set up expectations from the beginning. In the absence of a job description, any criticism of a volunteer's performance can be countered with the statement that the volunteer was not told what was expected. This places the whole supervisory process on a personal level, which is uncomfortable for managers and volunteers. If an organization has accurate volunteer job descriptions, the evaluation process logically—and objectively—begins with an assessment of whether or not the volunteer has accomplished the tasks that were stated. Basically, the volunteer job description is a set of goals and objectives for the individual.

Some still question whether it is appropriate to evaluate individual volunteers. They feel that volunteering should not be treated as a job and that volunteers will be offended to learn that someone will be assessing their level of performance. In the arts especially, some may confuse the social aspects of volunteering with people's desire to be of real help in supporting cultural institutions. In order to answer such concerns, it is necessary to address two philosophic issue areas: (1) What are general attitudes about evaluation, and (2) What is the most effective way to work with volunteers?

Despite many platitudes about the value of constructive criticism, most people really do not want to be told about their weaknesses. Even fewer enjoy being the ones doing the telling. Many employee evaluation

systems are little more than a cursory review of work done over a period of time solely for the purpose of determining whether the employee will get a raise or a promotion. This connection of "evaluation" to pay raises anxiety levels and results in very little learning.

Because so few people have positive feelings about their experiences in being evaluated as employees, the concept of evaluating volunteers is often rejected as unnecessary. It is felt that people should not be subjected to scrutiny for no reason (i.e., no raise or promotion at stake), especially when the organization should be grateful for the time these people are giving voluntarily.

Gratitude for volunteer service is legitimate, but it is hardly a reason to accept any and all work from volunteers as equally helpful. Organizationally, it is important to know who is doing a job well, what training may be needed to improve skills, and similar managerial concerns. Without a performance assessment process, leaders of an organization cannot know if goals and objectives are being met to the highest possible standards.

It is also important to note that evaluation can be extremely supportive of volunteers. Most volunteers want to do the best possible job. A well-designed performance evaluation, therefore, gives feedback—and meaningful recognition—on how well they are doing their jobs. If weak areas are uncovered, volunteers have the opportunity to improve, which may mean the need for better training from the organization. Wanting a volunteer to perform more effectively is an indication of respect, of faith that the person has the ability to improve. Not giving feedback implies a sense of low expectations from volunteers.

The challenge is to conduct evaluation as a two-way process that gives both parties the chance to reaffirm commitment to each other (or to decide to end the relationship). The evaluation might be called a "progress assessment" or a "future action plan" so it is not simply a rehashing of the past. Emphasis should be on what needs to be done to get even more from the working relationship. The volunteer should also be encouraged to evaluate the support s/he receives from the organization.

The best action plan process is a combination of written forms and a personal interview. One might start with a questionnaire completed independently by the volunteer and his or her immediate supervisor. The questionnaire should be attached to the job description accepted by the volunteer at the start of the period to be evaluated. Sample questions might include

1. Which tasks on the job description did you do most this year? (or, for the supervisor, "Which tasks did the volunteer do this year?")

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2. Which did you do only rarely or not at all? Should these be deleted from the job description?
3. Were there any tasks you did that are not listed? Should these be added to the job description?
4. How would you assess your performance of each task?
5. What might help you to improve your performance of these tasks?
6. How would you describe the supervision you received on this assignment?
7. How helpful was the training you received?
8. What suggestions do you have that might make this work area more productive?
9. Do you wish to continue in this assignment?
10. Is there anything else you would like to tell us?

Each organization will ask different questions, depending on its needs. It is important to remember, however, that all assessment begins with the volunteer job description.

Having each completed the preliminary questionnaire, the volunteer and supervisor meet to compare their answers. Each can provide recognition of achievements and criticism of weak areas. The goal of this meeting, however, is to determine an action plan for the future. Together (or with the help of the volunteer program leader), they negotiate (1) whether the volunteer will continue in the assignment as is or with some changes; (2) what additional training or chances to participate the volunteer will receive in the coming months; (3) specific strategies to improve weak areas uncovered; and (4) what new things the volunteer hopes to do in the coming months. This action plan is written, dated, and signed by both parties. It then goes into the volunteer's record and will be used at the next performance assessment.

For the volunteer program leader, this future-oriented assessment process has clear management implications. From the results of the action plans, the leader is able to

1. Determine which volunteers will remain in their present assignments or be reassigned (either as a "promotion" or to utilize their skills in a different way);
2. Update volunteer job descriptions throughout the organization;
3. Identify training needs (i.e., if volunteers are having trouble accomplishing parts of their assignments, perhaps the organization can provide some skill development areas);
4. Discover which staff members are doing a good job supporting volunteers and which need to be trained to be better supervisors;

5. Obtain information about volunteers that can be used during the annual recognition process;
6. Give volunteers the chance to give suggestions from their perspective that can help each volunteer assignment area and/or the entire organization to work better; and
7. Allow some volunteers to leave or be asked to leave the organization.

There are many other approaches to individual performance assessment of volunteers. While the first line of evaluation needs to be the immediate supervisor of the volunteer, since often only that person has first-hand knowledge of what the volunteer has been doing, the director of volunteers might participate in a three-way (second line) meeting with the volunteer and/or the staff member. Individual evaluations may be conducted again through an evaluation team or panel of people selected annually to assess the accomplishments of all volunteers.

Regardless of who conducts the evaluations, it is important that they be done on a regular basis for every volunteer. If a performance assessment is only done when a volunteer is doing a job poorly, the process is likely to be viewed negatively. On the other hand, if volunteers expect an annual progress assessment that occurs equitably and impartially for everyone, the procedure itself becomes neutral and can be approached positively.

An exit interview should be held with volunteers who are leaving the organization. If the termination date is known in advance, the exit interview permits closure for both the volunteer and the organization and demonstrates recognition for the end of valued services. If a volunteer simply stops coming, the effort to contact him or her and discover the reason(s) can be very helpful. At best, it might result in the volunteer recommitting to the organization. At worst, it will reveal what caused dissatisfaction—information that might help prevent future unexpected departures of volunteers.

Firing a Volunteer

The possibility exists that a volunteer is not maintaining an acceptable standard of work and should be "fired." Ideally, the mutual assessment process will allow the volunteer to admit discomfort in his or her role. If this does not occur, however, organizational leaders must reassign or fire volunteers who are not doing the work properly. If this is not done, volunteers will feel that hard work is unvalued while poor work is tolerated. It is better to support the majority of volunteers who are doing a fine job than to protect the few who are not.

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Ideally, the daily supervisory process will target volunteers who are having problems with their assignments. This should allow for troubleshooting well in advance of having to fire a volunteer. A trial run that allows both the organization and the volunteer to assess the success of the volunteer's assignment after a few weeks permits early handling of a clearly inappropriate placement. No volunteer should feel that his or her assignment is a right; all work must be assessed in terms of the organization's needs. The best volunteers understand and accept such a premise. Only weak volunteers place their sense of ownership over the good of the organization as a whole.

Reluctance to enforce standards may result from a feeling that dealing with a weak volunteer carries risks. Concern might center around losing a donor, complaints reaching someone important, or generating bad public relations. There may indeed be some backlash from asking a volunteer to leave, but keeping a volunteer who is doing poor work may be turning off (and away) good volunteers and potential donors. The consequences of not acting to remove an inappropriate volunteer are likely to be worse than any resulting from him or her being fired.

The need to fire a volunteer often is preventable by careful screening of candidates prior to assignment. If there are signs that a person might be inappropriate for a particular slot, concern about continuing a vacancy should not be so strong that the placement is made despite initial doubts. When inappropriate assignments are made, management time and energy are dissipated in dealing with the problems that result.

In recent years, court cases have established that volunteers must be treated with the same concern for civil rights that is shown to employees. This means that an organization must fire a volunteer in a legally correct manner. In general, the organization should have written documentation of the reasons for the dismissal. It is legitimate to establish certain rules for both employees and volunteers, the violation of which would result in automatic removal from a position. Aside from the commission of a crime, such as theft, an organization might stress that someone can be fired for removing an art object from the building without proper protective packaging, allowing visitors into security areas, and similar infractions. If volunteers are informed of these rules during their orientation, the organization can enforce the rules whenever they are violated. A written report of the incident should be kept. An appeals process, comparable for employees and volunteers, also should be established.

The need to remove a volunteer from a position because s/he is not performing up to expectations is more complicated. Here a distinction might be drawn between volunteers who have been with the organization a long time and those recruited by the current program leaders. Newer

volunteers should have been given a job description and told about the annual progress assessment. Weak performance should be identified early and attempts made either to train the volunteer or reassign him or her to another set of tasks. These actions should be recorded and dated. The decision to fire therefore comes as the final step of a series of actions designed to improve performance.

When a volunteer has longevity, it becomes harder to enforce standards that have previously been lax. It also may be impossible to determine whether or not the volunteer was told long ago what was expected. The first step is to agree with the volunteer on a job description. The person should write out what s/he has been doing, and the volunteer program leader should list what the organization needs in that position. By comparing the two lists, areas of agreement and disagreement can be identified. Once a job description has been negotiated, it becomes the basis for the volunteer's accountability. If the person resists the need for a job description, that can be a starting point for documenting a non-cooperative attitude.

Often a weak volunteer is not surprised to hear that the organization is dissatisfied. S/he senses the negative reactions of supervisors and colleagues and may feel some discomfort with his or her own performance. Confronting the volunteer directly is always more appropriate than complaining to others.

Focusing on a problem may uncover unexpected situations. The volunteer may not be the one causing the problem. If the assessment process truly elicits two-way feedback, it might show that an employee is being so nonsupportive that the volunteer cannot perform well. The employee should not automatically be assumed to be beyond blame. Each specific situation must be analyzed and appropriate action taken.

Assessing Employee Management of Volunteers

If volunteers are to be assessed, an organization also should evaluate whether or not employees have done their best to enable volunteers to perform well. Frequently no mention is made of working with volunteers in employees' job descriptions, which is a major oversight. If a staff member is expected to supervise or work with volunteers, that role should be part of the job description. To demonstrate sincerity in wanting to integrate volunteers into the organization, each staff member should be held accountable for his or her role in facilitating volunteer performance.

Pleasant and productive supervision of volunteers by the staff should be rewarded by the organization. Nonsupportive, unproductive interaction with volunteers should be critiqued and corrected. A system

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of rewards for employees who are successful managers of volunteers serves as a positive example for the entire staff.

Conclusion

The arts in the United States have always depended upon the involvement of volunteers for their survival. Volunteers, as patrons, donors, audiences, and operational support workers, have maintained most cultural institutions and organizations in communities large and small. Gratitude for such continuing voluntary service is legitimate, but this does not mean overlooking nonproductive work. The best recognition of the worth of volunteers is to maximize their impact.

The subject of evaluation reflects an organization's attitude about volunteers. If volunteers are not seen as part of the service team, no one will care about assessing their accomplishments. If, however, volunteers are accepted as important partners in achieving the organization's mission, evaluating their performance will be seen as important. In the last analysis, no one volunteers to waste time—and no arts organization can afford to waste anyone's time.

BIOGRAPHIES

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