

Training Busy Staff to Succeed with Volunteers: *The 55-Minute Training Series*

Betty Stallings

PowerPoint® Slides

Links to the PowerPoint slide presentations are displayed on the cover for each module.

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Introduction

How to Use

The 55-Minute Training Series to Train Staff and Leaders of Volunteers

A Unique Perspective

The majority of literature in the field of volunteer leadership is written to educate the person designated as the organization's manager/coordinator of volunteers. *The 55-Minute Training Series* can be used both to train leaders of volunteers from different agencies *and* to train *all staff* who interface with volunteers within one agency.

Designing a Training Program

To be truly effective, today's manager of volunteer programs must be able to share his/her knowledge about effective management of volunteers with the staff and volunteer leadership who work with volunteers on an ongoing basis. This shift in the role of the manager of volunteers towards staff empowerment is great theory, but is challenging to deliver and requires *all staff* to be committed to the volunteer program and competent to lead and support volunteers

Therefore "Section 1: Designing a Training Program" is a guide for assessing staff training needs, resources and practical techniques for gaining staff "buy-in," tools for promoting staff's effective utilization (competency) and support of volunteers, and a review of the basics of good training and delivery.

The "Module" Design

The 55-Minute Training Series consists of 12 individual "modules" which single out a specific topic such as interviewing, delegation, recognition, etc., and focuses the content around four key concepts. Each module can be shared in one of three ways:

- Information sharing primarily presented by the trainer.
- A combination of information sharing and facilitation of group exercises and discussion.
- A facilitated discussion surrounding one or all of the key concepts in the topic.

The modules may be expanded through additional activities or several modules can be grouped together for a retreat or seminar.

Module Components

Each module of *The 55-Minute Training Series* includes four components:

1. A Trainer's Guide for Presenting the Topic



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2. A Microsoft® PowerPoint® Slide Presentation (which can also be made into overhead transparencies)
3. Participant Handouts
4. Participant Evaluation Forms

1. Using the Training Guide for Presenting the Topic

Introduction

Each module begins with information introducing the topic to the trainer. The primary purpose of the introduction is to discuss why the topic is critical to good leadership of volunteers and how it relates to other management skills. This information may also be utilized to develop marketing materials to publicize the training, or it can be used by the trainer in the beginning of the session to share how these skills are crucial for success in working with volunteers.

Purpose and Learning Objectives

Sharing the overall purpose and key learning objectives of a training session helps participants to understand what they can anticipate learning. It gives an immediate sense that the session will be thoughtful and directed, with a careful use of time.

A significant way to evaluate the success of the training session is to have participants fill out the Participant Evaluation Form. One section of the evaluation allows participants to indicate if the learning objectives were met or not met during the training session.

If you modify the workshop, you may need to change or alter the learning objectives so that they are in line with your training focus.

As trainer/facilitator, you may wish to design additional activities and discussion topics to determine whether participants achieved the established learning objectives. For example, you could expand the interviewing workshop with a role-play to determine if participants can demonstrate the four-step process of interviewing.

General Notes to Trainers

The “General Notes to the Trainer” comments provide extra guidance and ensure that the trainer is comfortable with the script and prepared for any potential difficulties that might surface in the seminar.

Presentation Overview of the Module

Many trainers find it useful to have a one page summary of their training that includes the major sections of the presentation, approximate time for delivery, and corresponding slides for each section.

These modules are each designed to be presented in roughly 55 minutes. However, you may want to expand the time in some sections, depending on the time available and interests of participants.

If you are adapting or expanding this module, you will need to make changes in this overview. You may also wish to write actual times (9:00 a.m. - 9:10 a.m.) once you know the exact time you will have. This way you can be cognizant of how you are doing time-wise.



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Presentation Script

This section is the heart of the training. The “script” gives suggested opening introductory exercises, content and discussion questions, and activities. You have the choice of:

1. Presenting the information while utilizing the slides, or
2. Eliciting the information from participants through facilitation.

Let’s contrast the two styles using the *Interviewing* module as an example:

Presentation style: Trainer *presents* the reasons for the importance of the interview by using the slide which lists client protection, staff and volunteer morale, and agency reputation.

Facilitator style: Trainer *asks* the participants to share why interviewing of volunteers is important. Trainer may record participant ideas and then add any other reasons not mentioned.

Participant-based learning nearly always gets the best results. However, if the group does not have experience or information to share, you may need to present the data rather than facilitate the learning experience. Spending a great deal of time on a group discussion that does not illuminate any new or useful information can slow down the workshop process and frustrate eager learners. An experienced trainer knows the group well enough to determine if they collectively have the answers (they usually do) or if you are dealing with a topic about which the majority of the group have little information and therefore would appreciate a more structured presentation. The modules were developed to be flexible for either method selected.

Suggestions for Expanded Activities


Suggestions in this section focus on additional related activities or discussions that could extend the workshop.

Further Resources on the Topic

Suggested books, articles, and/or Web sites are included to help you prepare for the presentation. In addition, you may suggest these resources to the participants in your presentation for their own further learning.

2. Using the Microsoft® Office PowerPoint® Slide Presentation

Your electronic materials include a PowerPoint® slide presentation. Follow the instructions below to access the slides:

1. **You must have Microsoft Office PowerPoint installed on your computer to open the files.**
2. **Double-click the thumbtack icon  found on the cover page of each module to open the attached PowerPoint files.**
3. **Be sure to save the PowerPoint files to your computer before customizing them.**

The slides can be used as an overhead presentation if your location is equipped for projecting PowerPoint slide presentations (please refer to your technical support staff to find out more information). Otherwise, the “slides” may be printed onto to transparencies and used with an overhead



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projector or simply printed to be handed out to attendees. The slides are labeled in order of use: “S-1,” S-2,” etc.

For some trainers, overhead/PowerPoint slides double as their presentation notes. They help both the trainer and participants to stay focused on the main points of the presentation.

Recording participant responses on blank transparencies or flip charts will also help to focus attention on key topics.

If you wish, you may turn the PowerPoint slides into notes for you to use when preparing your presentation by clicking on the “View” menu button and selecting “Note Page.” This will provide you with reduced-size images of all the slides with a space for notes next to each.

3. Using the Handouts

In this section you will find relevant handouts to give to the participants during the seminar. They are labeled “H-1,” “H-2,” etc. in order of use. The key points from the PowerPoint slides are included here. You may want to add any of your program’s pertinent forms, policies, procedures, etc., which deal with each topic. As an example, in the interviewing module you may wish to add a sheet of suggested interview questions for positions within your program and/or a volunteer application form.

Remember, too, that PowerPoint allows you to easily produce handouts of all the slides, should you want your learners to take notes on your presentation point by point. Simply click “File,” then “Print,” and then in the lower left-hand section select your choice of either “Handouts” or “Notes Pages.” You can also choose how many slides to place on a page.

4. Using the Participant Evaluation Form

The final handout included with each module is a participant evaluation form which you may ask participants to fill out. If you have ample time at the close of the session, you may ask the participants to share their reactions and any suggestions for improvement in the seminar. It is particularly helpful for participants to share with others how they plan to apply what they learned.



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About the Author



Betty B. Stallings

Betty Stallings, MSW, is an international trainer, consultant, author, and keynote speaker, specializing in volunteerism, nonprofit fundraising, board development, and leadership.

She has written many popular books including: *Getting to Yes in Fundraising*, *A Resource Kit for Managers of Volunteers* and *How To Produce Fabulous Fundraising Events: Reap Remarkable Returns with Minimal Effort*. She has also authored "Families as Volunteers," a chapter from the book, *Managing Volunteer Diversity*, and has written numerous articles focusing on volunteerism and fund development. Since 2000, Betty has served as the Editor/Designer in charge of the "Training Designs" feature section in *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Betty is currently developing electronic resources focusing on the critical roles that executive staff and boards must carry out to ensure an effective volunteer program.

Betty has received numerous awards for creative volunteer contributions to her community and received the 1999 AVA Harriet Naylor Award for Distinguished Service to the field of volunteerism.

Formerly, Betty was the founder and 13-year executive director of the Valley Volunteer Center in Pleasanton, California. While at the Center she initiated such programs as the Women's Re-entry Internship, Career-Links, Borrow-An-Expert, Project Manage, and the Corporate Volunteer Council. Several of these programs have served as national models of volunteer utilization. While directing the Center, Betty obtained funding and supervised innovative research on volunteer management which resulted in the publication of the book, *At the Heart: The New Volunteer Challenge to Community Agencies*. Success in seeking financial resources for nonprofit organizations became Betty's hallmark while directing the Valley Volunteer Center.

Currently, Betty is an instructor in university nonprofit and Extension programs; a popular trainer for state, national and international conferences on volunteerism and fundraising; and a trainer and consultant to many nonprofit organizations, corporations, and public sector programs around the United States and Canada.

To learn more about Betty, visit <http://www.bettystallings.com/>.



Designing a Staff Training Program: *Conducting a Volunteer Program Assessment*

"We cannot become what we need to be by remaining what we are."

Max De Pree

If you see yourself as a Volunteer Program Executive, one of your key concerns will be the empowerment of the organization to utilize volunteers effectively.

Before you can lead this effort, you must have an accurate assessment of the existing volunteer program or the organizational climate to initiate one. The information in this chapter is specifically designed to assist your efforts at identifying those staff needs which can be addressed through a training/education program. Assessments will also reveal issues and problems which will be best resolved through adaptations in the program design, implementation processes, and guiding policies. These are important discoveries that must be addressed simultaneously for the ultimate success of your program. However, for purposes of *The 55-Minute Training Series*, the central focus is on the design of effective educational opportunities to enhance staff commitment and competency in working with volunteers. Because each organization is at a different stage with its volunteer program, you will need to adapt the materials and methods to fit your organization.

Purpose and Value of an Assessment

The primary purpose of this assessment is to discover the major strengths and weaknesses of the volunteer program. The assessment can be part of an overall volunteer program evaluation, or it can be targeted to gather information which will impact the design of a training program. An assessment should capture the collective sense of strengths and weaknesses, rather than reflect the expression from a handful of folks who freely share their opinions.

Assessments can also serve to anticipate problems, particularly if the program is just being established or if it is discovered that many staff are not feeling committed to the program nor competent in volunteer management skills. The following information and tools should help guide your process.

Steps in an Assessment

1. Gain approval from the executive director, superintendent, principal, or whoever will need to support the implementation of the results. Establishing or enhancing a training program will involve financial resources, access to staff, and time allotted to you for this endeavor. Therefore, it is imperative that significant decision makers are on board!



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2. Establish a task force or utilize your volunteer advisory council to assist you in the development of the assessment tool and the method of sharing results. Representation from line staff, administration, volunteers, and board would be optimal. Without this involvement, buy-in to the results is apt to be very disappointing.
3. Determine who should participate in the assessment and what methods of information retrieval would be most effective (an anonymous questionnaire, a small focus group discussion, etc.). After selecting the most appropriate method(s), formulate questions which will elicit the information you need to help design your volunteer training program (see suggested sample questionnaires in this chapter). If possible, have the questionnaire field-tested by a few staff; this way, you are certain that the questions can be answered with ease and that they elicit the information you desire.
4. Administer the assessment and tally results. Look for repeated concerns, themes, volunteer management topics of greatest interest to staff, signs of resistance, or lack of commitment to the volunteer program.
5. Have the task force analyze the findings and make suggestions for addressing the issues and concerns that surfaced. Note particularly those that can be addressed through training. Concerns and issues for which training is not the answer should be separately noted for the task force to analyze.
6. Present the findings and resulting recommendations to the executive director, board, or any administrator who needs to approve the plan for addressing the issues.
7. Present a summary of the findings and recommendations to the appropriate staff and volunteers.
8. With input from your task force or others who can effectively contribute to this process, design an in-service workshop, retreat, educational or facilitated sessions to deal with commitment and competence issues that surfaced in the assessment.
9. Implement your training program. Evaluate its impact through follow-up assessment with participants concerning improvements that resulted from the intervention.
10. Because training is an ongoing process, each assessment of a training or facilitation becomes part of the foundation for future training plans.

Methods to Obtain Information in an Assessment

There are numerous methods to gather information in a volunteer program assessment, but most will fall within these five categories:

1. Volunteer Program Assessment Guides
2. Tailored Questionnaires and Surveys
3. Focus Groups
4. Observation and Materials Review
5. Use of a Training Needs Assessment Tool



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Volunteer Program Assessment Guides

Several published volunteer program assessment guides are listed at the end of this chapter. They can be utilized by staff and volunteers to look at the overall strengths and weaknesses in their programs. They assessment guides are generic, so they may not totally fit your agency. However, they can often be the starting point for identifying areas where training may be useful in diminishing barriers in the program. These assessments generally cover all elements involved in volunteer management, including such areas as job design, risk management, and recruitment.

Individual Questionnaires and Surveys

Suggested questionnaires are also listed at the chapter's end. These could be given in writing or in small focus group discussions to staff, volunteers, and administrators. These questions are primarily aimed at surfacing issues around commitment, support, and competency of administrators, staff, and volunteers. You may adapt them to meet your organization's needs. Requesting names of respondents will be dependent on the trust level within the organization and the nature of the survey.

Focus Groups

If written questionnaires are inappropriate due to the size or culture of your organization, you may find that leading an informal discussion on some of these questions may access more information. Important things to keep in mind: (1) clearly state the purpose of the discussion; (2) keep the discussion focused; (3) share what will be done with the information; and (4) give feedback as to what plans will be implemented as a result of these and other forms of information gathering.

Observation and Materials Review

A good assessment frequently includes an analysis of existing programs through a review of the materials that give shape and form to the volunteer program (e.g., volunteer or staff manuals, intake and interview forms, risk management policies, etc.), as well as general observation of the volunteer program in action. Such analysis and observation will add a deeper dimension to the opinions expressed on questionnaires. You may wish to ask college interns studying Organizational Development to help design and implement this component of the assessment.

Training Needs Assessment Tool

One of the most direct ways to access information about training needs is to use an instrument developed by Organization Design and Development called T-NAT (Training-Needs Assessment Tool). This resource is listed at the conclusion of this chapter.

This tool is basically a vehicle for analyzing and documenting an individual's training requirements as compared to his or her present knowledge or skill for performing a specific job.

Step One:

The first step is to identify the skills necessary to perform the role of supervising volunteers (e.g., interviewing, supervision, job design, etc.).

Step Two:

The second step involves answering two questions:



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- (1) What is the employee's present ability level for each skill/knowledge mentioned in Step 1 (e.g., interviewing - level of skill could be low if used only in work with volunteers)?
- (2) For each job, what skill level is needed for satisfactory performance (e.g., the skill level will need to be high if staff select their own volunteers; or it may be low if staff are given volunteers who are screened by a volunteer coordinator)?

The answer to these questions will reveal either a discrepancy (training is needed) or a match (no training is needed).

In the T-NAT process, employees plot their abilities and the job need levels on a grid. It becomes immediately obvious where the most significant training needs are (e.g., very high need for a particular skill but low ability/experience level).

A training action plan can be derived from analyzing and prioritizing needs. The training activity form identifies the skill, the priority for need in training, a training plan, and a timeline for completing the plan.

This tool may be an executive director's preferred method since it takes a short amount of time and can be utilized in other skill areas for employees. It is an excellent adjunct to a volunteer program assessment. Its additional value is its usefulness in educating staff about the skills and knowledge involved in managing volunteers.

The Assessment Results

The information you have gathered from one or a combination of the above methods is the foundation for developing strategies to enhance the program. If you are overwhelmed with the material, involve someone who is skilled at identifying themes, prioritizing them, and succinctly presenting them to key people within the organization.

It is often tempting at this stage to proceed directly to making changes in forms, procedures, etc., or to design some training for staff. It is extremely important, however, to note any signs of staff resistance to the volunteer program and give these issues and concerns priority focus.

References on Assessment

Ellis, Susan J. *Volunteer Management Audit*. Philadelphia: Energize, Inc., 2003.

<http://www.energizeinc.com/store/5-206-E-1>

McCurley, Steve and Sue Vineyard. *Measuring Up: Assessment Tools for Volunteer Programs*. Downer's Grove, IL: Heritage Arts, 1997. Order at www.energizeinc.com/bookstore.html

McCurley, Steve and Rick Lynch. "Measuring Volunteer Program Effectiveness." Chapter 15 in *Volunteer Management: Mobilizing all the Resources in the Community*, 2nd edition. Ottawa: JTC Publications, 2006. Order electronic edition at www.energizeinc.com/bookstore.html and paper copy at www.volunteertoday.com.

McCann, Travis and James Tashima. *Training Needs Assessment Tool (T-NAT)*. King of Prussia, PA.: Organization Design and Development, Inc., 1994. Information and ordering at: <http://www.hrdq.com/products/tnat.htm>.



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Assessment of Volunteer Program and Staff Training Needs

Staff Input

This survey is part of the agency plan to enhance our organization's delivery of services to our clients. The information you share will assist in the design of an in-service training for staff and lead volunteers who work directly with volunteers to carry out our mission. Your thoughtful and honest response will allow us to design the training as specific and useful to your concerns and issues as possible. The individual information will be kept confidential but collective themes and recommendations will be utilized in proposing training topics and methods. Thank you for your assistance.

Agree

Disagree

1. The time and effort I invest in supervising volunteers is well worth it because of the benefits accrued from volunteer service.
2. Volunteer participation enables me to perform activities/tasks I would not otherwise be able to do.
3. Volunteers are well oriented towards an understanding of my priorities, concerns, frustrations, etc., as a staff person.
4. In general, volunteers are qualified for their positions in our organization.
5. I feel recognized and rewarded by the organization for my efforts with volunteers.
6. I think that I possess the necessary skills to manage volunteers.
7. I would feel more competent in my involvement with volunteers if I received:

stronger orientation to the volunteer program

written information on the volunteer program

other (list):



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**Rate Your Proficiency with these Skill Areas
in Managing Volunteers**

Strong

Weak

Interviewing

Supervision

Delegation

Volunteer Evaluation

Risk Management

Volunteer Motivation

Volunteer Recognition

Volunteer Job Design

Volunteer Recruitment

Orientation & Training

Performance Problems

Performance Reviews

What do you see as the major problems or barriers to utilizing volunteers more effectively in our organization?

Please elaborate on any specific concerns/requests that you would like to see addressed in volunteer management training for staff and volunteer leaders in our organization.

Name _____

Position _____



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Assessment of Volunteer Program and Staff Training Needs

Administration Input

It is important in designing a staff training program in volunteer management that we have your perspective, commitment, and thoughts to guide us. I look forward to discussing these questions with you at a convenient time or, if you prefer, you can answer the questions in writing prior to our meeting. Thank you for your leadership in ensuring high quality services to our clientele through our staff/volunteer teams.

1. When hiring staff, is consideration given to their experience, motivation and skills in working with volunteers?
2. Do you think that the role of staff in supervising volunteers is clearly defined in our organization? If yes, how is this accomplished?
3. Are staff evaluated as to their work with volunteers in the organization? If yes, how is this accomplished?
4. In what ways are staff rewarded for excellence in working with volunteers? Any new ideas?
5. Do you think that staff training in volunteer management principles is important to enhancing our readiness to effectively utilize volunteers?



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Assessment of Volunteer Program and Staff Training Needs

Administration Input

(continued)

6. How could we enhance our orientation to new staff in order to give more information and review expectations about our volunteer program?

7. What is your philosophy on training of staff, board, and lead volunteers to be better equipped to work with volunteers?

8. In your opinion, is the Board of Directors given adequate orientation and updates on the volunteer program of our organization?

9. What is a realistic expectation of the level of support for staff training in working with volunteers (e.g., resources such as books and tapes on volunteer management, access to staff for training, time for volunteer manager to prepare and deliver the training)?

Name _____ Position _____



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Assessment of Volunteer Program

Volunteer Input

This survey is part of the agency plan to enhance our organization's delivery of services to our clients. The information you share will assist in the design of in-service training for staff and leadership volunteers who work directly with volunteers to carry out our mission. We would appreciate your thoughtful and honest response. Your individual information will be kept confidential but collective themes and recommendations will help guide efforts towards a new training program. Thank you for your assistance.

Name (optional) _____

1. In what positions have you volunteered at our organization?

2. Have you found your volunteer work to be interesting, challenging, fun? Comments:

3. Did you receive sufficient orientation prior to volunteering with us? Comments:

4. How would you characterize the supervision given to you by staff or leadership volunteers at our organization?

5. Do you think that your time and talents are well suited to the volunteer position that you hold (held)? Comments:



Assessment of Volunteer Program

Volunteer Input

(continued)

6. Do (did) you feel sufficiently trained/coached in your volunteer job? Comments:

7. Do you feel well appreciated by the organization, staff, clients, other volunteers?
Comments:

8. What are the volunteer program's greatest strengths/weaknesses?

Strengths:

Weaknesses:

9. What suggestions do you have for improving the volunteer program?



Designing a Staff Training Program: *Gaining Staff Commitment to the Volunteer Program*

"There is no such thing as education without motivation."

Ivan H. Scheier

Commitment can be enhanced once a person feels more competent in his/her ability to perform a task. More often, however, interest in learning comes after someone feels motivation or commitment to an activity. That is why it is important to be sensitive to any staff resistance to utilizing volunteers before launching an in-service training program to build staff competency in skills related to managing volunteers. People do not tend to "hear" information unless they see a reason for learning it.

If you have the good fortune of having a highly motivated, receptive staff, you can move with confidence into the design or enhancement of the staff orientation and training program. But don't be surprised if, some day in the future, you need to refer back to some of these suggestions to tackle this challenge.

Identifying and Understanding Staff Resistance

Frequently resistance is not so much active sabotage as passive resistance. It is not so much what staff do, rather what they don't do (e.g., request volunteers for interesting work, give ongoing informal recognition to volunteers).

Resistance to volunteers (and thus to learning how to work cooperatively with them) is frequently derived from fears held about volunteers:

- The time needed to supervise volunteers without returned value to merit this time expenditure.
- Issues around volunteers being a threat to client confidentiality.
- Concerns that staff will be "stuck" with them if they say "yes."
- Fears that volunteers will be utilized as justification for reducing a budget.
- Concerns that job security may be threatened by volunteer replacement.

Pretending that these are not valid issues or simply giving pat answers will only deepen the apprehensions. It is important to surface and understand the staff members' previous experience working with volunteers or being volunteers and their resulting hesitations and perceptions.

Dennis C. Kinlaw, in *Coaching For Commitment*, indicates that the four essentials to building staff commitment are: **Influence, Clarity, Appreciation, and Competence**. I would add a fifth: **Mission/Vision**. The following are suggestions on how to build staff commitment with these essential principles as underlying foundations.



Methods to Gain Staff Support to Build a Solid Staff/Volunteer Team

1. Influence

We know that people are committed to activities and programs that they have a part in designing. Thus, participating in an assessment is an excellent method to begin building staff involvement (influence) in the volunteer program. Influence is further enhanced by including staff in the feedback and problem-solving sessions. Ideally, in a retreat setting, give feedback from your assessment survey regarding issues and barriers which were identified as keeping staff from enthusiastically supporting the volunteer program. Encourage honest sharing of any additional concerns of staff.

In response to the list of concerns and issues, ask the question: "What can we do, organizationally and personally, to break through these barriers?" By asking the question in this fashion, you are asking for their involvement and influence in the solution to the problems.

A common barrier mentioned in sessions I have led is: "Volunteers do not give enough return value for the time invested in them." In breaking down the issue, it often leads to a productive discussion of types of volunteer jobs available, qualifications, and screening of candidates, volunteer jobs requiring extensive training with no obligation for service, etc. These discussions ultimately propose solutions, such as more careful job design, assigning only qualified volunteer candidates, etc. With these improvements, staff can begin to experience the tremendous benefits that occur when they work with carefully matched volunteers. The time invested is now far surpassed by the value given by these volunteers.

More often than not, the fears and issues keeping staff from commitment can be addressed by improving or adapting some aspect of the program or by providing essential training to staff. Because the staff are **involved** in these solutions, the program becomes theirs and they begin to develop commitment to it.

2. Clarity

A major stumbling block to staff/volunteer success is a lack of clear definition as to roles. Without written volunteer job descriptions which include job tasks, requirements of volunteer candidates, and benefits of the position, it is always a nebulous working relationship and therefore difficult to supervise, evaluate, or dismiss volunteers. When staff begin to see that supervising volunteers is very similar to good supervision of paid staff, they begin to listen with a new ear.

It is equally important for staff to have a clear understanding of what is expected of them in the management of agency volunteers. Most often, this expectation is an unclear, unwritten assumption. This lack of clarity can promote the feeling that supervising volunteers is a lower level activity. Therefore, commitment can be compromised due to considerable effort being channeled to those tasks and activities spelled out in their written job description.

Clarity on policies and procedures, risk management, reporting requirements, etc., is also exceedingly important to build in cooperation and commitment to the volunteer program for both salaried and non-salaried staff. There are numerous outstanding books written over the past few years that have made volunteer program design, planning, and policies considerably easier to develop. Don't re-invent the wheel; there are many models to use and adapt for your organization.



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It is possible that the impact of the clarity issue, although the cause of significant barriers to volunteer/staff success, may not be viewed initially as the source of concern. Thus, the manager of volunteers may need to bring this issue to the attention of the staff and administration of the organization.

3. Appreciation

Supervising volunteers is a challenging, often thankless job. To enhance staff commitment to the volunteer program, it is important that they are rewarded for their efforts to partner with volunteers in the accomplishment of the organization's mission. Recognition is frequently given only to volunteers, ignoring the extra efforts of staff to support volunteer activity. When staff are noticed for their efforts, their enthusiasm and commitment are frequently enhanced.

One of the most effective ways to implement staff recognition is to honor the team of staff/volunteers at appreciation events. Having them both recognized further underscores the philosophy and significance of teamwork. Staff in human service endeavors often put in many more hours than they are ever compensated. Therefore, this appreciation can have multiple positive effects on their morale and commitment to the organization and to the volunteers.

Special informal recognition by the managers of volunteers and/or by the executive director and letters of appreciation for staff personnel files can also do wonders! And including a special section in your volunteers' orientation – a section which sensitizes incoming volunteers to the pressures and concerns of staff - is another form of staff recognition. This sharing can be most effectively performed by a staff person. I have seen it done very well in a humorous skit and discussion (e.g., a typical day in the life of our staff, including all the interruptions; a crisis or two, etc.).

4. Mission/Vision

Whether you are initiating your volunteer program or attempting to enhance one already in existence, your first step is to lead the organization in the establishment of a mission for the volunteer program. Few programs ever give thought to this crucial activity. Ideally this mission statement is developed and written by the board of directors with input from the administration, manager of volunteers, and volunteers within the organization. An inordinate number of problems occur in a volunteer program because it has no clear written mission statement and no accompanying set of values upon which policies are established.

If volunteers are utilized merely as a form of saving money, I can almost guarantee future problems in the volunteer program. A volunteer program based solely on economics will look very different from one whose vision and values extend well beyond cost savings. The following are examples of **mission statements** that are included in books and also ones that I have discovered in my work with volunteer programs around the country:

- **Carlsbad, CA City Library**

Carlsbad City Library is best served by providing citizens fulfilling opportunities to utilize their skills to enhance the quest for knowledge and the enjoyment of reading in the community. Citizen engagement is a major part of the library.

We believe that citizen engagement:

- *Improves customer service and our relationship with the community we serve*



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- *Allows the library to expand our capacity and enhance our services*
- *Provides us with the community's point of view and takes back to the community word of our services*

We are committed to the recruitment, training, and support of citizen volunteers to ensure their continued involvement in library services and to develop this resource to its fullest.

- **From *From the Top Down* by Susan J. Ellis (Energize, Inc., 1996)**

Our agency encourages the teamwork of salaried staff and volunteers so that we can offer our consumers the best services possible. Volunteers contribute their unique talents, skills, and knowledge of our community to provide personal attention to consumers, enable the salaried staff to concentrate on the work for which they were trained, and educate the public about our organization and its cause.

- **Chabot Space and Science Center's Volunteer Vision Statement, Oakland, CA**

Volunteers are essential partners with the staff in meeting the mission of our museum. Aspiring to have a model volunteer program, we will provide:

- *A pleasant, helpful, and educational environment which will nurture volunteers' full range of talents, skills and experiences*
- *Opportunities for personal growth and development for the volunteers through continuing education programs which meet the standard of excellence of our museum*
- *Active recruitment of volunteers from our community to reflect the cultural diversity of this region*
- *An ongoing, reciprocal exchange of information and ideas between the staff and the volunteers to best accomplish our goals*
- *Training, support, and rewards to staff for their creative and effective involvement of volunteers.*

- **Planned Parenthood of Delaware**

The achievement of the goals of this organization is best served by the active participation of citizens of the community. To this end, the organization accepts and encourages the involvement of volunteers at all levels in the organization and within all appropriate programs and activities. All staff are encouraged to assist in the creation of meaningful and productive roles in which volunteers might serve and to assist in recruitment of volunteers from the community.

Most people develop commitment to a vision/mission that enthusiastically draws them to a higher calling. When I facilitate a retreat for a nonprofit organization where staff are deeply resistant to volunteering, I frequently utilize a simple four-step process that breaks through this resistance and generates positive, visionary energy.

Rather than starting off with all of the current problems related to the volunteer program, I have retreat participants reflect on an ideal program for their organization and how it might be achieved. The following key questions/reflections will stimulate a discussion in this visioning process:



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1. **Think about a volunteer in your organization whom you would describe as ideal! Reflect on what he or she has accomplished for the organization, for you, and for themselves** (this can be shared in small groups if there are a large number of participants; ideally, several people can share their thoughts with the entire group).
2. After everyone has the ideal person and his/her impact firmly fixed in their minds, **ask participants to imagine multiplying this person by 100** (you can choose any reasonable number for your organization). **Begin to share what could be accomplished if you had these 100 ideal volunteers working in your organization.** Record all the responses. It is amazing to feel the energy rise in the room as participants describe the impact of having a number of great volunteers working with them in accomplishing their mission.
3. After the ideal is pictured, ask: **"What are the barriers, issues, or problems keeping us from accomplishing this?"** The participants will most likely list such issues as:
 - No effective recruitment and screening of volunteers ("We're desperate and take anyone").
 - Routine, boring jobs for volunteers.
 - No support or training for staff who supervise volunteers.
 - Volunteers not held accountable.

Record all of these comments on flip charts so that the participants can deal with them in the next step.

4. The last question is: **"What can we do to begin breaking through these barriers to accomplish our vision?"** This begins the problem-solving session where staff, manager of volunteers, volunteers, and administration are all seeking solutions to these barriers. If there has been enough energy generated around the vision of a successful program, problem solving is productive and creative. It is important for you to remember that the sign of a good manager is someone who is able to assist people in breaking through barriers that are preventing their success. Keep the discussion focused on what needs to change organizationally. This begins to move responsibility for the success of the volunteer program to the entire organization, not just to the one person whose role it is to provide leadership to the volunteer program. Remember, you are a Volunteer Program Executive now!

5. Competency

If staff do not feel a level of comfort with the skills and knowledge needed to successfully work with volunteers, commitment will be hampered. Even if staff do support the utilization of volunteers, their ardor will diminish if they are not successful in their work with them. Thus, there is an essential need for competency training.

Armed with some essential foundations of commitment - *influence, clarity, appreciation, vision/mission* - we can now devote time to the heart of this material: developing staff competency.



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Designing a Staff Training Program: *Building Staff Competence*

*“Insanity is doing the same thing over and over again,
expecting different results.”*

Unknown

There are many factors associated with a successful volunteer program. In the section on “Building Staff Commitment,” the critical elements in having the organization's buy-in and involvement with the volunteer program was discussed. No longer can its success or failure fall on the shoulders of the one person designated to manage it. Frequently in my workshops, I ask managers of volunteers if they have ever had staff members say (while pointing a finger at them): “*Your* volunteer is not working out!” The anxious laughter that follows is an indicator of this pervasive problem.

The second key factor for success in a volunteer program is having staff who are competent in the skills of supervising volunteers. Occasionally, a manager of volunteers or an administrator will make a deadly assumption: “Since the staff seem committed and enthusiastic about volunteer utilization, they must be proficient at it.”

Except for cursory explanations of how the volunteer program works, staff often receive very little support and training in the skills of working with volunteers. The volunteer program can be meticulously structured and may pride itself on recruiting wonderful volunteers. But if these volunteers work with staff who are neither committed nor competent in utilizing volunteers, the volunteer “revolving door” syndrome may occur. This often results in staff comments such as, “See, volunteers are not reliable” – the downward spiral of a volunteer program.

Let us turn now to **the critical factors for building staff competency** through a carefully constructed training and technical assistance program. Exploration of the following questions may be a useful guide:

- In general, what are the training needs (skills and knowledge) of staff who work with volunteers?
- What are some occasions to provide volunteer management education to staff?
- What are some methods to provide volunteer management education to staff?
- How do you gain the support of administration to provide you access and sources necessary for staff training?
- How can you stimulate staff interest in receiving skills training in volunteer supervision?
- How can you provide educational opportunities if you are not a trainer?
- How can you evaluate the impact of staff training?



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The Training Needs of Staff Who Work with Volunteers

Training needs are best determined by asking two questions:

- What do staff members need to know to be successful in working with volunteers?
- What do staff already know?

The gap between the two answers (what they need to know and what they know) will identify the learning needs.

What does staff need to know to be successful working with volunteers?

Training programs are generally designed to affect one or more of the following types of learning: knowledge, skills, and attitudes.

Knowledge: Staff who work with volunteers may need knowledge in the following areas:

- trends impacting volunteering
- policies and procedures for the volunteer program (e.g., dismissal, risk management, performance review)
- information about significant groups of volunteers working at the agency (e.g., seniors, youth, corporate, baby boomers)
- roles and responsibility of staff in the volunteer program

Skills: Staff who work with volunteers generally need skills in:

- delegation
- interviewing
- recognition
- supervision
- job design
- conflict resolution
- communications
- motivation
- performance reviews
- recruitment
- orientation and training
- handling performance problems
- evaluation
- risk management

Attitudes: It is important for staff to examine their attitudes regarding:

- the value of volunteers
- importance of management functions such as performance reviews, risk management



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- willingness to delegate
- confidentiality
- cultural differences

What do staff already know?

Some staff are managers who have the basic skills of personnel management and mainly need to transfer these skills, with some adaptations, to the management of volunteers. Other staff may have no formal education or experience in management and therefore need some basic skill development to work effectively with volunteers. Thus, you may need to design several adaptations of the training.

It is helpful to identify areas of priority and to design training that follows natural sequential learning (e.g., job design before recruitment). It is also important to factor in current issues and needs of your organization's volunteer program when selecting topics. For example, if you add a program with youthful clients, you will need to augment screening and risk management training. Every organization will discover their own uniqueness as they answer these questions and study the results of their formal or informal volunteer program assessment.

Adult education principles teach us that adults are most apt to learn in areas that **they** identify as needs. Therefore, it must be underscored that designing an appropriate training program should involve extensive input from those who will participate in the training. Adult learners must feel a need for the information and must receive information that will be immediately practical and useful to them. Therefore, if possible and appropriate, involve some staff on the task force to design the training program and include some staff in the delivery of the training.

Armed with identified learning gaps, you can now begin to look for appropriate methods and times for delivering the training.

Occasions to Provide Volunteer Management Education to Staff

Each organization will have different opportunities that are particularly suited to its focus, structure, and size. Listed below are a few times when volunteer management training might be considered:

- when staff is newly hired
- when a new volunteer program is initiated
- during agency re-organizing
- at the first meeting of a committee or task force
- during staff meetings: Ask to provide in-service training at several meetings during the year or ask for a regular brief time to provide information and education on effective volunteer utilization at each meeting.

It is best to provide a planned, ongoing educational program to staff. However, often your entree will come at a time of crisis. People tend to become more motivated to listen if they think you have information that can assist them in the solution of their issues or crisis. Be cautious, however, if you are asked to train staff on "the joys of utilizing volunteers" at the same time that staff are experiencing an impending cutback. The dynamics of that volatile situation can be awkward. It would be wise to spend more time educating administration on the issues surrounding perceived job replacement by volunteers.



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Methods to Provide Volunteer Management Education to Staff

Organizational variables such as size, geography, age of organization, staff experience, will guide you in determining which of these methods of education would be most appropriate to your organization.

- **In-service training series** for the organization, department, or new staff which could be held two to six times a year on topics selected by a training task force in conjunction with the training assessment results.
- **Orientation on volunteer program for new staff** with written materials, one-on-one coaching with manager of volunteers or appropriate person, and/or quarterly orientation sessions with new staff.
- **Video training** with focus on the staff utilization of volunteers. There are a few older, commercially-produced videos still on the market (most have been replaced by online training) or you could have one designed specifically for your organization. College interns or professional videographers could donate this as an in-kind service. There are obvious advantages to this form of training. No one on staff needs to design and present it each time it is needed. And it can be very flexible; volunteers can view it from home if unable to attend a training session.
- **Online training** is the newest option and programs are evolving all the time. Again, you can create your own Web-based materials, or use one of the commercial products with adaptations. For example, Energize, Inc. offers a service called *Everyone Ready*[®] which delivers online training and other electronic resources specifically to train staff in working with volunteers (see References at the end of this chapter).
- **Books and library resources** can be very helpful in designing training. You can review material and distribute information that would be particularly useful to staff. Be certain that you are honoring copyright laws when you distribute material. Most authors in the volunteer management field are very generous in allowing material to be copied if it is for in-house use only.
- **Newsletter and e-newsletter tips** on working with volunteers can be particularly useful when you work in a large, geographically-spread organization. The Department of Mental Health and Retardation in Austin, Texas, shared its staff newsletter with me. They initially provide field service staff with a resource binder and, on a monthly basis, add tips and resources which can be added to the binder. They often gain permission to copy articles from such publications as *Nonprofit World*, which has excellent articles on volunteer management. A subscription to *e-Volunteerism: The Electronic Journal of the Volunteer Community* can provide you with current information with international scope (see References at the end of this chapter).
- **Retreats** are an excellent way to provide competency training for staff. They are often suggested by staff when they begin to see the advantages of knowledge gained through in-service sessions and other resources shared with them.



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Gaining Administrative Support to Provide Access to Staff and Resources for Educational Support

Convincing administrators to support your training efforts may be challenging. You must construct your request to include how your training and educational materials will ultimately enable the organization to reach its mission more effectively with a strengthened volunteer program. Since administrators must make difficult decisions based on priorities, resources, impact, etc., you should ask some staff to join with you in this request so that the desire and need is an expression of the staff, not just the manager of volunteers. In your proposal, also include the problems and impacts when staff are not well trained to utilize volunteers. If there is resistance to your full plan, ask for an opportunity to present one training and be certain to give follow-up of staff feedback to administrators. Having staff give their endorsement can be crucial to future access.

Involving the administrator early in the process of the assessment and design of a training program will prevent the disappointment of efforts being thwarted after long hours of preparation.

If you are a member of Directors of Volunteers in Agencies (DOVIA) or other professional volunteer manager groups, ask to share ideas with others who are attempting to build administrative support for their training program.

Developing Staff Interest in Training and Education in Managing Volunteers

Staff will only be interested in training if they can understand how it will benefit them. It must be perceived as solving their problems. For example, rather than inviting them to a workshop on "Interviewing Volunteers," invite them to learn how to design interview questions that will screen in the right volunteers. The following are some additional suggestions:

- Involve staff in the process of identifying skill/information gaps and designing methods to provide them. Utilize these same staff to promote the training to other staff.
- Make certain that the training is designed to solve staff identified problems. If you alone have defined the needs, your presentation will fall on deaf ears.
- Have the agency administrator endorse the training and participate, if possible.
- Offer the same training topic twice so that staff can select the most convenient time to attend.
- If you have a three to four part series, offer a certificate of completion suitable for framing. Write a letter for the participant's personnel file.
- Utilize staff in the training. A peer-to-peer educational exchange is generally more readily accepted. This is a wonderful way to recognize a staff person who models excellent leadership of volunteers.
- Involve some of your outstanding volunteers in parts of the training. (In a seminar on staff training I gave to a Florida DOVIA, a participant said she learned the most about



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recognition when a panel of her organization's volunteers shared what kinds of recognition they had received and which ones had been the most meaningful.)

- If, due to budget restraints and other barriers, you are not given staff time to present skills training workshops, offer an optional lunch-time series where lunch (and perhaps other incentives) are built in. On a tight staff training budget, one innovative director of volunteer services offered a four-part optional brown bag seminar series called "Skill-building Workshops in Bite-Sized Pieces." Her "menu" of topics was quite enticing. If the word gets out that the sessions are beneficial, you may reach many who will share the word with others.

Providing Educational Opportunities If You Are Not a Trainer

If you are not experienced as a trainer, you may choose one of several options:

- **If you wish to develop your training skills:**
 - (1) Attend a train-the-trainer workshop. Check with your local Volunteer Center or United Way Management Assistance Program to see if they deliver this type of training. Another good resource is your local chapter of American Society for Training and Development (ASTD).
 - (2) Read some excellent books on designing and delivering training, adult education, etc (see References at the end of this chapter for some suggestions).
 - (3) Begin by doing brief training sessions for small groups to build your confidence and competence in this skill area. Also, you may wish to present your first training to colleagues with whom you have a close relationship. Ask them for honest feedback so that you can improve your technique.
- **If you don't have time to design workshops**, you will find that the modules here will be a great time saver for you. Many directors of volunteers who utilized the modules and trainer guide during the field testing indicated that they were able to deliver a module after only 1.5 hours of preparation. You will also find that these user-friendly tools can easily be tailored to meet the specific needs of your organization. A train-the-trainer class to receive content delivery tips may be advantageous.
- **If you do not wish to become a trainer yourself**, you can hire an outside trainer who specializes in volunteer management. Or you can hire or exchange services with another volunteer director in your area who is comfortable with training. You might also propose a partnership with another organization whereby they provide training either jointly with their staff or to your staff exclusively, in exchange for a service you will provide for them. There are also increasing numbers of online seminars offered in volunteer management, such as the *Everyone Ready*[®] program. Your role would be to host it and facilitate discussion on the topic. Increasingly, universities, such as the University of North Texas, are offering these seminars. Use Google™ to search for "online volunteer management training" and you may be surprised at the resources you could tap into.



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- When I was an agency director, we often utilized the in-kind donated talents of corporate trainers. If they train in human resources, they could readily train with the modules on volunteer management. If you have a Junior League in your area, this volunteer organization often has excellent trainers who are also knowledgeable in volunteer management issues.

One last suggestion: incorporate volunteer management principles into other management training offered to your staff. Since we encourage staff to use the same management principles with volunteers as they would with salaried employees, it may be possible to augment your organization's basic management training with information on working with volunteers. You would be seen as a resource person assisting in the training rather than taking full responsibility for it.

Very few people start their careers as trainers. They develop the skill once they have information to share and potential learners who need this information. Once you get over the jitters of your first attempts, you may find yourself improving rapidly - and even enjoying it!

Evaluating the Impact of Staff Training

Three types of evaluation methods can be utilized to determine whether a training has been successful:

- Initial Participant Reaction
- Measurement of Learning Objectives
- Behavior on the Job

1. Initial Participant Reaction

Initial participant reaction is the most common evaluation method used. Participants are generally asked to respond to an evaluation questionnaire, rating such aspects as quality of presentation, clarity of goals, physical location, etc. This method has very little to do with impact as there has been no time to try out new skills or use new information on the job. It does, however, have significance as to how staff see the benefit of devoting time to the topic. If they leave with a feeling of increased enthusiasm and a sense of being better equipped to do the job, there will be an increased buy-in and commitment to the volunteer program. When this initial feedback is given to administrators, they will be more likely to endorse future training. On the contrary, if the initial reaction is that the information is not useful or presented in an interesting fashion, the impact will be nil to negative. So, an initial reaction can be an important first indicator of probable success.

2. Measurement of Learning Objectives

This method examines whether the learning objectives were, in fact, accomplished. During the closing stages of a training, one can use review exercises that will indicate whether participants changed attitudes or learned new knowledge or skills. Although indicative of probable benefit, it cannot be assured. Changed behavior on the job will be the significant indicator.

Each of the modules in *The 55-Minute Training Series* has a set of learning objectives that will be met if participants absorb the key concepts upon which each module is built. Thus, if one of the learning objectives is to have participants know the four steps in interviewing volunteers, you can test this learning through an interviewing role play and feedback session.



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3. Behavior on the Job

To determine real impact of training, one needs to allow time for participants to try out new behaviors. Then, follow up and assess the change. This type of evaluation is rarely done because of the time it takes to gather the information. A helpful question to include on an evaluation is: "What do I plan to do differently as a result of this training?" Simple follow-up questions you could ask participants in person, via computer, or by survey are: "What are you doing differently since the seminar?" "What have you noticed to be the impact of your changed behavior, approach, attitude?"

A sample evaluation form is included in each of the modules associated with *The 55-Minute Training Series*.

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Designing a Staff Training Program: *The Basics of Good Training*

*"Spectacular achievement in training is always preceded by
unspectacular preparation."*

Betty Stallings

There are literally hundreds of books written on the subject of training. For those of you interested in professional development in this area, I highly recommend that you invest the time and money in some of the books in the reference section of this chapter. The purposes of this brief chapter are: (1) to highlight what I believe are the essential features involved in good training; and (2) to share some general training tips for those of you who, with the aid of *The 55-Minute Training Series*, wish to begin or enhance your role as an in-house staff trainer in volunteer management.

My comments fall into four major categories:

- Principles of Adult Learning
- Training Design and Content
- Climate and Room Set-up
- Trainer's Delivery of Content

Principles of Adult Learning

Assuming that most staff you will be training are adults, it is important for you to understand features of adult learners which will guide you in both content design and in the delivery of that content.

1. Adults determine for themselves what is important to learn and therefore are looking for relevant, useful information.
2. Adults bring a broad base of experience and a need to validate information based on their past beliefs and experiences.
3. Adults have many preoccupations outside of a particular learning situation and will be easily distracted if the information is not practical and presented well.
4. Adults respond to positive, appropriate reinforcement. They are hesitant to show vulnerability and are particularly offended by "put downs" (e.g., "I think we already covered that, Jack").



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5. Individuals generally have a preferred style of learning:
 - Auditory (they like the lecture)
 - Visual (they like the transparencies and handouts)
 - Kinesthetic (they like exercises and self-learning activities)
6. A good trainer includes all styles so as to reach a diverse audience.
7. Adult learning is particularly impacted by feelings of physiological comfort (e.g. chairs), safety (location of training) and social interaction (relationships with other participants and the trainer).
8. Adults have significant ability to serve as knowledgeable resources to the facilitator and to other participants.
9. Adults tend to be problem-centered and will feel satisfied only if their problem is dealt with and resolved. This is a good reason to uncover these issues prior to or at the beginning of a seminar.
10. Adults have set habits and tastes. For example, some need caffeine, some want health food, some are offended by profanity, and some environmentally-concerned participants are distressed when handouts are not printed on both sides. Effective workshop leaders accommodate as much as possible these adult habits or tastes. If not, the evaluation form will not relate whether they gleaned anything from the workshop but rather what offended them.
11. Adults are people who can change and grow - a prime tenet of faith for workshop leaders to hold.
12. Adults function best in a collaborative environment and like to share in the planning and presentation of the workshop (this is particularly true if the training is in-house).

Along with this need to understand basic adult learning principles, one must also pay close attention to the needs and level of knowledge of your particular workshop participants. If you have some experienced staff who may not need basic training in volunteer management topics, you might involve them in the delivery of the training or, minimally, use a facilitated style of learning where these staff can share their experiences.

The staff training assessment should guide you in your selection of topics. Remember that adults want practical information that can solve their problems. Often as they struggle with finding solutions to their problems, they begin to realize that the solutions are connected to increased knowledge and skills in areas they had not identified as a problem. For example, staff may not define delegation as a problem but may discover in problem solving that a probable cause of repeated disappointments in volunteer follow-through may be related to their own skill and ease in delegation to volunteers. When this "ah-ha" occurs, they often initiate a request for training in this area.



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Training Design and Content

The 55-Minute Training Series has done much of this work for you. However, I strongly encourage you to adapt the material to the needs of your organization or to develop new topics that may be of particular use to your staff. The following are a few recommendations as you prepare to design and/or select your content:

1. Good training design begins with the assessment of the learning needs of anticipated participants. Your content should be built around the gap between what staff needs to know to be successful and what they already know.
2. After the topic(s) are chosen, it is important to specify key learning objectives that deal with knowledge, skills, and attitudes. Learning objectives basically describe what a participant should be able to know or do or feel at the conclusion of the seminar.
3. Select a moderate level of content. There is a tendency to throw in everything you know about a given topic, and the result is a rushed session where little is retained. The best approach to developing a lean curriculum is being selective - choosing the **need to know** before the **nice to know**. When the content level is kept moderate, the trainer can lead activities that experiment with and reflect upon what is being presented.
4. Provide printed resources that will be utilized and/or shared (e.g., handouts, activity sheets, training manuals for participants, in-house forms, information to be brought by participants). These resources greatly enhance learning if they are well done and tie closely to the presentation. If handouts are distributed and no acknowledgment is given to them, they are infrequently read or utilized.

A typical sequence for training is:

Beginning of training:

- Purpose of session
- Learning objectives and key concepts
- Climate setting, ice breakers

Middle of training:

Content developed around key concepts, done in logical fashion and building from theory to application, knowledge to skill. Selected training activities/learning methods vary from passive to participant phases:

- Lectures
- Role Play
- Slides
- Flip Chart
- Group Dyad Activities
- Panel Discussions
- Brainstorming
- Case Study
- Dramatization



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Occasional breaks and energizers if session is longer than 90 minutes.

End of training:

- Review and summarize content
- Have participants process experience ("What will I do differently when I return to my job?")
- Conduct an evaluation to get a sense of the perceived value of the session to the participants. True evaluation occurs if you can arrange a follow-up form whereby actual impact can be recorded. For example: "As a result of the workshop in interviewing, I now see its value and have arranged to give half-hour screening interviews to volunteer candidates in my department."

Climate and Room Setup

The environmental and climate factors in a training are critical to a seminar's overall success. Consider the following:

1. Room size and setup

Managing the seminar's physical environment is not always totally in your control, but there are several key factors that are critical to its success.

Consideration should be given to the size of the group and type of relationship you want to promote between yourself and the group. A small group in a very large room will feel cold and impersonal, so it is best to create your corner by using room dividers, plants, etc. The reverse - cramming too many people in a room - can create visual and comfort problems. If the tables can be situated in a horseshoe pattern, you can create a more intimate environment. A horseshoe arrangement, however, with many empty seats creates energy gaps for the trainer (e.g., your energy flows through the gaps).

When you are giving a workshop, participants' chairs and tables should be arranged so that everyone can see the leader's table and the space where he/she will be training. Common seating setups are herringbone (tables slanted towards the center) or round tables where seats are placed so that everyone can see the trainer.

2. Lighting

Natural lighting is always favorable, but if there are too many windows (with good views!) day dreaming may be a major activity of participants. Pay attention to lighting so that participants can take notes, the trainer is seen, and transparencies or other media are clear. This may involve utilizing a darker spot for the overhead projector. Avoid turning down lights as day dreaming may turn into real dreaming!

3. Acoustics

Consideration must be given for clearly hearing the trainer and for participants to hear one another. Utilizing a lavalier microphone may be necessary in large groups. Always repeat any participant question or comments if he/she is not in hearing range of others. If people have difficulty hearing, it is nearly impossible to recapture their interest. Prior to training, always check acoustics for the person who will be seated furthest from you.



Training Busy Staff to Succeed with Volunteers *The 55-Minute Training Series – Designing a Staff Training Program*

4. Temperature and Ventilation

This one is always a challenge! For everyone who is cold in a seminar, there will be someone who is warm. The best way to deal with this critical factor for participant comfort is to have a temperature which is comfortable for most participants. If you are training in a room at your organization which tends to be hot/cold, you might remind staff of this so that they can dress accordingly or dress in layers. Occasionally parts of a room are a different temperature due to heat and air-conditioning vents. If you know this to be the case, you may want to alert participants to these conditions before they get situated.

5. Seating Comfort

This is not always in your control, but you need to remember that learning and interest decrease rapidly when participants are in hard chairs. Think of ways to allow learners to move around, stand up, etc. There is nothing more disturbing after a workshop than to read evaluations which spend most of the time referring to the unsatisfactory climate and environment factors.

6. Food and Beverages

The rule of thumb is to have variety if you are doing seminars for over 90 minutes. People who are health conscious can be quite disturbed if all that is offered in the morning is caffeinated coffee and donuts. It is best to let participants know in advance by a flyer, e-mail, etc., what will be served. Then, they can attend to their own needs if necessary.

Another pointer is to carefully select a luncheon menu that is not too heavy, particularly if participants continue their training in the afternoon.

7. Audiovisual and Equipment Aids

Having good equipment can support a good training program but poor equipment can be a major distraction (I could write a book on the humming, dirty, lopsided overhead projectors with which I have trained!). Make certain a day or two ahead that you have the equipment needed to present your training. If you prefer using an overhead projector and the organization does not have one, many businesses or libraries will loan you one. Always have an extension cord and an extra light bulb on hand - just in case! When using a Microsoft® PowerPoint® presentation, rehearse using the equipment that will be used for your training. Check it well in advance of the session so that problems can be handled before you begin (I speak from experience!).

8. Restrooms

This is generally an issue if your training is over 90 minutes and you selected an off-site location for the training. You may need to lengthen your breaks if restrooms are limited in number for the size of the group.

9. Traffic Flow in the Room

The room should be arranged so that the registration table, refreshments, exit doors, display tables, etc., are at the back of the room so that you and the participants are not distracted. It is also helpful to ask participants to sit in front seats so that late comers can slip into the back without causing commotion. At the beginning of a seminar it is helpful to ask if any participants will be leaving early. If so, ask them if they would sit close to an exit.



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10. Name Tags or Identification

If people in your training session are unknown to you or each other, I would suggest that they have their first names (in big print) on a tented paper name card in front of them. If they are unknown to each other, name tags are also helpful.

Trainer's Delivery of Content

It is one thing to know information, quite another to effectively communicate it to a group. Through my experience, I would note several qualities and skills for successful delivery of a training:

1. Variety in Training Methods

There are numerous training methods from active to passive that can be used to introduce or reinforce a concept or skill. These methods are based on a single or combination of senses: sight, sound, or hands-on. The key is to match methods with the type of participants and to provide variety related to the learning outcomes desired.

Common training methods include: structured warm-up exercises, presentation of content (lecture), demonstration, film/video, small group dyad discussions, questionnaires, role plays, games, case study. Research has shown repeatedly that information shared orally will, after three days, be 90% forgotten. When your participants "see" with visuals (e.g., transparencies/slides) as well as being told, they will lose only 35% of the information. Approximately 70% of people in Western culture learn primarily from visual stimuli. Therefore, you need to formulate your message and activities using visuals and words.

Whatever methods are selected, it is important to design feedback so that participants acknowledge the learning and begin to apply it to their own work situation. As a trainer, I have found that the simplest feedback exercise after a group exercise is to ask participants to summarize their major learnings. Rather than each group sharing their entire list, ask them to add items which have not been previously mentioned. Rotate the feedback order during the session so that more groups get "floor time."

2. Participant Interaction

As previously mentioned, adults learn best by sharing their ideas, experiences, and responses with one another. Therefore, even in workshops as brief as 55 to 90 minutes, one should aim to facilitate rather than teach most concepts. Generally (and there are exceptions), most of the answers are held collectively in the group. When using *The 55-Minute Training Series*, if you are unsure of your facilitation skills, you can present the material. It is generally preferred, however, if you ask a question. For example, rather than telling participants the qualities of a good interview, you ask them to recall a time when they were interviewed well and have them share the skills and qualities of the interviewer. You can actively record the information on flip charts or transparencies and then add any traits which are notably missing.

At the early stages of training, using the facilitated approach may feel more difficult as you must be able to rephrase and summarize "on your feet" and you must keep the group focused on the task at hand. New trainers tend to gradually move from mostly presentation (it's safer, and you can prepare and control it) to a combination of presentation and facilitation. Comfort with the information and additional training experience seem to make the difference.



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3. Flexibility

Being organized and prepared are admirable qualities in a trainer but often situations occur (e.g., equipment breaks, participants struggle with a concept longer than anticipated) that require you to change plans to provide a good learning experience. It seems that the ability to be flexible comes with the confidence derived from continued experience.

4. Transitions and Pacing of Material

The energy of your audience will fluctuate. Those variations should, to some degree, guide you in decisions around the methods and content you cover.

Some generally-accepted guidelines include:

- Early morning is generally the best time for a short, punchy, quick delivery.
- Midmorning is an optimal time for group involvement.
- Late morning is a good time for tough work since it is when people are generally most alert.
- After lunch is important for participant involvement, which will help them re-energize and overcome post-lunch lethargy.

One of the most important skills in a training is how you make transitions from one concept or topic to another. It is helpful if the participants know the flow of the day up front. Also, making linkages between concepts can help people see how the individual segments of training all fit together to change attitudes or to build a knowledge or skill base. When I was starting out as a trainer, I spent much of my time thinking through (and often writing down) transition segments of the workshop. It comes more naturally after you have had experience.

5. Natural Humor

Responding spontaneously to humor in the group is considerably more effective than planned jokes. If people can laugh and learn simultaneously, you will have a winner. Humor is harmful when it is sarcastic or somehow makes participants feel stupid or inept.

6. "Been There" Feeling

Perhaps nothing separates effective trainers from theoreticians more than the genuine qualities of an authentic person who has stood in the shoes of those they train. If you do not have volunteers directly reporting to you, you will have a difficult time truly appreciating the challenges of leading volunteers. Theory is important but it must be followed with concrete, practical suggestions on how participants can diminish the barriers and problems they experience in this work.

7. Appropriate Dress

There are no hard, fast rules regarding appropriate attire for training. I have found that I am most comfortable when I dress to blend with the participants (with a slight upgrade) so that they can relate as well as respect me. Dressing well beyond your audience puts you at a psychological distance from them. Also I have discovered that wearing something very comfortable and attractive will give me an added boost of confidence, allowing me to focus my energies and attention on the group. If people spend too much time at break talking about your earrings or tie and not the content of the seminar, that is a clue that you may have over-done it!



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8. Effective Use of Equipment and Visuals

Be as assertive as you can about the need for proper equipment and good placement of the teaching aids. Your excellent presentation can be ruined if attention is not devoted to this. Numerous studies have shown that visuals increase the effectiveness of presenting, as measured by retention, anywhere from 38% to 200%.

PowerPoint presentations:

Since this new edition of *The 55-Minute Training Series* provides Microsoft PowerPoint slides, here are some basic instructions for using them:

- Test your computer and LCD equipment connections well in advance of your training session to make sure everything is compatible and works! This is especially important if you are conducting the session outside of your regular facilities (e.g., a hotel or training center).
- Familiarize yourself with the “animations” on each slide – how each line appears on the screen as you click through it. These have been created to follow the flow of your narration. You can always change or eliminate these animations, but it is best to show one line of text at a time rather than fill the screen all at once and then cover the points individually.
- Keep in mind that you might need to darken the room for the slides to be read easily.

Review the next section for more training hints, even though overhead projectors are going out of vogue.

Overhead projectors and screens:

You may still be utilizing an overhead projector and flip chart, and you can make overhead transparencies from the PowerPoint slides. Here are some suggestions for better results in using this equipment:

- Screens should be 42" off the floor. Optimum visibility can be achieved by placing the screen in a corner and angling it toward the center of the room. This allows you to write on the overhead projector while facing the workshop participants. Plan for a minimum of eight feet between the projector and the screen.
- Tilt the screen forward at the top or back at the bottom. If the projector beam does not meet the center of the screen at a 90 degree angle, "keystoning" image distortion will result.
- The table should be large enough to hold the projector plus an "in" and "out" stack of transparencies and any other items you may need during your presentation (e.g., marking pens, examples to show, notes). Often, I need to place a small table next to the projector table, since it is generally too small to hold all that is needed at your fingertips during a training.
- In writing transparencies, use the “seven by seven” rule: no more than seven lines of type, no more than seven words per line. Keep it simple!
- A transparency should contain only one overall idea, but acceptable numbers of sub-ideas can be increased as the experiential level of the audience is raised. If you wish to cover



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some portions of the transparency as you introduce individual concepts, you may wish to try the method of cutting out a piece of cardboard or file folder which is 11 by 11 inches (the standard transparency is 10 by 10 inches). Tape two or three pennies to the top of the cardboard and slide it under your transparency. Move the cardboard down as you reveal new information. When finished, slide the cardboard up so it completely covers the lighted stage; remove your transparency and place the next one on top of the cardboard. You will be eliminating the distracting light or clicking on and off of the equipment.

- When you present material, maintain eye contact with the audience. Avoid reading the material from the screen or turning your back to the audience.

Flip charts:

- Flip chart recording is particularly helpful in small groups when you are capturing audience response. They also can be printed in advance of the training. Author and trainer Sue Vineyard suggests that you use a post-it note at the bottom of completed pages, with a keyword to recall the theme of the page. For larger groups, up to 200 people, you will need to limit yourself to 10 lines of two-inch high letters using a one-quarter inch thick marker. Alternate marker colors are good for emphasizing key points or moving through sequential lists.
- When recording, strive to use participants' exact words. This can be done by asking: "Does this capture what you said?" "Can I paraphrase that by saying...?" or "Would you summarize that idea in a phrase or two for our record?"
- Use abbreviations liberally: > (greater than), < (less than), ^ (increase), etc.
- Always face the group and stand to the side of the flip chart when recording. Consider having someone be a recorder while you gather information from the group. It is best if this person is skilled at recording; too often, a person is "volunteered" only to find out that s/he is not able to perform the task adequately, which causes problems for you and for participants. It also takes a staff person from the seminar and places him/her in a role where he/she can no longer participate in the discussion.

These are a few suggestions for working with visual aides in *The 55-Minute Training Series*. I would suggest that you read some of the books listed at the end of this chapter for further guidance. I particularly recommend *Delivering Effective Training Sessions* by Geri McArdle.

9. Organized Training Space

A major consideration in room arrangement is the presenter's workspace. It is a reflection on you as a professional. Participants will expect you to be organized, calm, and in control of your materials and equipment.

A few tips:

- Have a separate table for handouts, name tags, extra note paper, pencils, etc., near the training room entrance.
- Ideally, you will have a separate table for the overhead projector which should be wide enough to hold transparencies, a master copy of your script and notes, and the participant handouts.



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- Have your notes where you can see them but participants cannot. The best deliveries seem spontaneous and "live."

10. Presentation and Facilitation Skills

Advice on presenting and facilitating could take up entire books; therefore, you may wish to register for public speaking or facilitation classes, or read some outstanding resources in this area. But don't wait until you feel you have perfected these skills to begin to train. So much learning comes from trying out your skills, evaluating your own performances, and improving each time you present. For beginning trainers, it will be easier for you to start by presenting the material and utilizing the script provided to you as a model.

Each time you present, however, gradually introduce one topic and gather information through a facilitated participant discussion in which you pose questions, such as those offered in *The 55-Minute Training Series* modules. Nearly all participants from organizations involved in field testing the *Training Series* found the participant discussions useful as they related to their organization's issues. Facilitation generally takes longer than presentation, but ultimately results in a more receptive audience and in greater retention and utilization of the material discussed.

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Training Busy Staff to Succeed with Volunteers: *The 55-Minute Training Series*

PowerPoint® Slides

*To open the attached PowerPoint slides,
double-click the thumbtack icon below.*



Trainer's Guide for Presenting...

Designing Positions for Volunteers

Betty Stallings

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Designing Positions

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Trainer's Guide for Presenting the *Designing Positions for Volunteers* Module

Introduction to Designing Positions for Volunteers

The organizations that successfully utilize today's volunteers are those that understand the changing trends and dynamics impacting prospective volunteers. They challenge their organizations to adapt their volunteer opportunities to meet the needs and offerings of these volunteers.

Designing work for volunteers and writing position descriptions are the most important activities performed in volunteer management. If you think about it, the volunteer positions offered by your organization are your *products* (i.e., what you are trying to sell to prospective volunteers). If they are challenging, useful, and thoughtful activities, people will say "yes" to your recruitment. If they are not, people know that there are a thousand other ways to spend their time.

One of the key reasons why volunteers leave organizations is because they entered the organization with an unclear notion of what was expected. Without written position descriptions, most position information is shared verbally, leaving the door wide open for misunderstandings. With position descriptions, information can be communicated, reviewed, and re-evaluated periodically.

This workshop gives staff and leadership volunteers an opportunity to focus on their roles in this important task of designing attractive volunteer positions.

Learning Objectives

The **primary purposes** of this module are to:

- Sensitize volunteers and staff to the significance of volunteer position design.
- Provide tools and methods to enhance their efforts in designing creative and effective volunteer positions.

Upon completion of this module, the participant will be able to:

1. Describe the significance of good volunteer position design.
2. Analyze the trends in volunteering and their impact on the design or redesign of volunteer positions.



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3. Design new volunteer position opportunities within their organization.
4. Name the necessary components of written position descriptions.

General Notes to Trainer

1. This workshop is in a suggested format. Feel free, however, to personalize it with your own stories. Also, phrase questions and activities in a manner most attuned to your organization.
2. This workshop is apt to surface problems that staff and current volunteers have with their own position descriptions. Generally, if there are inadequacies in this arena of management, it will be difficult to introduce the concept of clear position descriptions into the volunteer component of the organization until staff and other leadership volunteers feel clear about their responsibilities.
3. You may decide to select one or two of the key concepts of this module and devote your in-service session to them. Any one of the concepts merits a longer discussion than is scheduled in this overview session.
4. This workshop is very helpful to offer if one of your goals is to get staff buy-in for the volunteer program. In this seminar, staff and leadership volunteers should be invited to be a significant part of the design of volunteer opportunities. (Remember that people tend to support what they have a part in designing.)
5. As a follow-up to the workshop, it would be helpful to send a summary of what happened to all staff who participated and to all who were unable to attend.



Presentation Overview

SLIDES/ HANDOUTS	SECTION	METHOD OF PRESENTATION	TIME
S-1 to 2	Introduction <ul style="list-style-type: none"> • Introductory Comments • Learning Objectives • 4 Key Concepts 	Presentation	5 minutes
H-1			
S-3 to 5	Key Concept 1 Importance of Position Design	Discussion Activity	8 minutes
H-2			
S-6 to 11	Key Concept 2 Trends	Discussion Activity	8 minutes
H-3			
S-12 to 14	Key Concept 3 Expanding Use of Volunteers	Individual & Group Activity	25 minutes
H-4			
S-15 to 17	Key Concept 4 Writing Position Descriptions	Presentation	7 minutes
H-5			
S-18	Summary/Wrap-up/ Evaluation	Presentation	2 minutes
H-6			
			Total: 55 Minutes



Presentation Script

SLIDE/ HANDOUT	SECTION	TIME
<p>S-1: Learning Objectives</p> <p>S-2: Key Concepts</p> <p>H-1: Key Concepts of Designing Positions for Volunteers</p>	<p>Introduction Share brief Introductory Comments & Learning Objectives. This in-service training is built on 4 Key Concepts. (Introduce all 4 quickly.)</p>	5 minutes
S-3 Key Concept 1	<p>Key Concept 1 Good volunteer position design is pivotal to the ultimate success of a volunteer program</p>	8 minutes ▼
S-4: Warm-up Activity	<p>Warm-up activity: Ask participants to think about an experience where they worked without a written position description or where the position description and what they were expected to accomplish were not aligned. Ask participants: <i>What problems or benefits did you experience when working without a clear, written position description?</i> Possible responses:</p> <ul style="list-style-type: none"> • Could never please self or others • Could never celebrate completion • Other staff and volunteers had varying ideas of what I do • Very frustrating • Could not prioritize work • Was able to develop my own position (a positive for the entrepreneurial volunteer!) <p>Key Learning: Often if you do not have written position descriptions, volunteers will experience feelings of frustration working at your organization. However, having only a rigid listing of volunteer opportunities may be a deterrent to a volunteer offering a skill you have not previously sought (but could be useful) or to a volunteer who wants to negotiate a portion of a position or share the position with another volunteer.</p>	



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SLIDE/ HANDOUT	SECTION	TIME
<p><i>(continued)</i> S-4: Warm-up Activity</p>	<p>Question to participants: <i>Other than the obvious value of giving a person a clear description of what is expected of him or her, what are some other benefits to having written position descriptions?</i> (Get several ideas from participants and compare to the slide listing the benefits.)</p>	<p>▲ (same 8 minutes)</p>
<p>S-5: Benefits of Written Position Descriptions H-2: Designing Positions for Volunteers – Purposes</p>	<p>Some expected answers:</p> <ul style="list-style-type: none"> • They serve as marketing tools for recruitment. (The position is what you are selling to prospective volunteers.) • They serve as the primary guide for screening volunteers. (Without written qualifications that explain the experience needed in a position, organizations take any willing person to fill a position.) • They are the basis for supervision and evaluation. (Without a written position description, it is difficult to have a credible evaluation of a volunteer's work.) • They serve as a contract between the volunteer and the agency. (Volunteers need to know what they are saying "yes" to.) • They give information about position responsibility, etc., to co-workers or volunteers thus giving role clarity to both paid and non-paid staff. 	
<p>S-6: Key Concept 2 H-3: Designing Positions for Volunteers (Trends)</p>	<p style="text-align: center;">Key Concept 2: Understanding trends in volunteering should impact position design and re-design in your organization.</p> <hr/> <p>Presentation: As we design or evaluate current positions, we must do so in light of key changes and challenges occurring in the prospective volunteer community.</p> <p>Discuss volunteer trends and ask participants how the organization is impacted and how they are (or need to be) accommodating to these trends so as to be more attractive to prospective volunteers</p>	<p>8 minutes ▼</p>



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SLIDE/ HANDOUT	SECTION	TIME
S-7: Trends in Volunteering	<p>Example: Trend: Most volunteers are employed Impact: Volunteers unavailable during working hours. Volunteers must be recruited at their paid work sites. Potential Responses:</p> <ul style="list-style-type: none"> • Design positions that can be done in flexible time slots. • Send recruitment brochure to companies. • Develop lunchtime volunteer opportunities. • Arrange for longer hours of staff coverage. • Design virtual volunteer assignments. 	<p style="text-align: center;">▲ (same 8 minutes)</p>
<p>S-8-9: Sample Trends in Volunteering</p> <p>H-3: Trends</p>	<p>Suggested Trends to Share with participants:</p> <ul style="list-style-type: none"> • With increasing demands on their time, volunteers are looking for shorter-term assignments • Volunteers want freedom to act more quickly and prefer to join smaller, locally controlled organizations. • Volunteers (especially Baby Boomers) expect challenging and interesting assignments. • Volunteers come from a broader cross-section of our society (e.g., growing number of professionals, young people, unemployed). • Today's volunteers expect to be treated professionally. • Nearly all volunteers need more flexibility in hours. • Family and group volunteering are very popular. • People are more interested in working for causes than for organizations. • Many look to volunteering for job experience, training, re-entry to employment. • There are many people with professional skills available to nonprofit organizations. • There are multitudes of motivations for volunteering (work off fines, help family, meet friends, etc.) • There are increasing numbers of “voluntolds” (e.g., many high schools and universities require students to perform volunteer hours to graduate or supplement course work). 	



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SLIDE/ HANDOUT	SECTION	TIME
S-10-11: Responses to Volunteer Trends	<p>As your organization considers responses to these trends, consider the following potential responses, if not mentioned:</p> <ul style="list-style-type: none"> • Designing of episodic (short-term) positions • Position sharing • Group volunteer opportunities • Targeted recruitment to professionals, youth, retired people, ethnic groups, etc. • Offering flexible hours and locations • Organizing a substitute system of volunteers • Reimbursement of volunteer's expenses • Breaking down committee work into time-limited task forces • Efficient use of volunteer time • Broadening the ways volunteers are utilized in the organization (direct service, administrative help, professional services, outreach, PR) • Develop positions for evenings and weekends • Develop positions that can be done off-site (e.g., in volunteer's home, office) • Create opportunities for students with assignments which meet both the organization's and volunteer's needs 	<p style="text-align: center;">▲ (same 8 minutes)</p>
S-12: Key Concept 3	<p>Key Concept 3 Expanding the ways volunteers are utilized within an organization will enable it to more effectively reach its mission.</p>	<p style="text-align: center;">25 minutes ▼</p>
<p>S-13-14: Activity to Design New Volunteer Positions</p> <p>H-4: Designing Positions for Volunteers (Activity)</p>	<p>Activity: Have participants engage in an activity to develop new volunteers jobs (this exercise was developed by Dr. Ivan Scheier). Ask participants to do the following:</p> <ol style="list-style-type: none"> 1. List all the duties of their positions. 2. Put an asterisk next to tasks which: <ul style="list-style-type: none"> • They feel unqualified to perform • They would rather not be doing 3. Write some of the tasks that surfaced in numbers 1 & 2 on flip charts posted around the room. 4. List the things they would like to do but don't have the time to perform now (this is the "Dream List"). 	



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SLIDE/ HANDOUT	SECTION	TIME
<p><i>(continued)</i> S-13-14: Activity to Design New Volunteer Positions</p>	<p>5. Brainstorm programs, services, etc., they would like the organization to performing, but due to limited resources cannot now do. 6. Record all the "dream list" and new service ideas 7. Have all staff and volunteers study the flip charts and begin to develop some new, interesting, creative, potential volunteer positions from the tasks "released" in step 2 and the "dream list" of the staff. 8. At the end, assign a small task force to refine these positions and develop potential new opportunities.</p>	<p style="text-align: center;">▲ (same 25 minutes)</p>
<p>S-15: Key Concept 4 H-5: Designing Positions for Volunteers</p>	<p style="text-align: center;">Key Concept 4 Position descriptions should be clearly written and include all essential information.</p> <hr/> <p>Presentation: The position description is your planning tool to help your volunteers understand the results to be accomplished, the tasks that are involved, the skills that are required, and other important details about their role.</p> <p>A position description provides an organized means of creating continuity in a position from one volunteer to the next. It is also a living document that will be revised as the program changes or the volunteer develops during his/her service.</p>	<p style="text-align: center;">7 minutes ▼</p>
<p>S-16: Volunteer Job Description</p>	<p>The ideal job position contains the following elements: (You may wish to show your agency's own form or refer to the example of categories in H-5.)</p> <p>Position Title</p> <p>Supervisor (reporting requirements and supervisory assignment)</p> <p>Goal or purpose of the position (Why was position created and how does it relate to the purpose of organization?)</p> <p>Major responsibilities (What are the key expectations of the volunteer?)</p> <p>Time commitment (Hours, dates, days, length of time commitment needed by volunteer, amount of flexibility)</p> <p>Qualifications (required and desired)</p>	



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SLIDE/ HANDOUT	SECTION	TIME
<p><i>(continued)</i> S-16: Volunteer Job Description</p>	<p>Ideal job position (continued)</p> <p>Work location (Where will the volunteer report to work or can all or some of it be done off-site?)</p> <p>Benefits to Volunteer (e.g., job training for marketable skills, free meals, tickets, free parking, admission, reimbursed expenses, opportunity to make a difference, etc.)</p> <p>Date of position design or re-design (Review should occur yearly.)</p>	<p>▲ (same 7 minutes)</p>
<p>S-17: Activity</p>	<p>Possible Activity: Ask participants to design a new volunteer position description using the form in the handouts or your own organization's format.</p>	
<p>S-18: Summary H-6: Evaluation</p>	<p>Summary/Wrap-up/Evaluation</p> <p>Paraphrase: Re-emphasize the importance of designing positions that consider the current trends of volunteering and the importance of expanding the current utilization of volunteers. Good, sound position design is the foundation of a solid volunteer program but it should also retain the fluidity necessary to continually undergo change.</p> <p>Distribute Participant Evaluation forms.</p> <p>End 55-Minute Training.</p>	<p>2 minutes ▼</p>



“Thumbnail” View of Slides

Training Busy Staff
to Succeed with Volunteers:
The 55-Minute Training Series

*Designing Positions
for Volunteers*

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Learning Objectives

- ▶ Describe the significance of good volunteer position design.
- ▶ Analyze the trends in volunteering and their impact on design or re-design of volunteer positions.
- ▶ Design new volunteer position opportunities within your organization.
- ▶ Name the necessary components of written position descriptions.

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4 Key Concepts

1. Good volunteer position design is pivotal to the ultimate success of a volunteer program.
2. Understanding trends in volunteering should impact position design and re-design in your organization.
3. Expanding the ways volunteers are utilized within your organization will enable it to more effectively reach its mission.
4. Position descriptions should be clearly written and include all essential information.

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Key Concept 1

- ▶ Good volunteer position design is pivotal to the ultimate success of a volunteer program.

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Warm-up Activity

- ▶ *What problems or benefits did you experience when working without a clear, written position description?*
- ▶ *Other than the obvious value of giving a person a clear description of what is expected of him or her, what are some other benefits to having written position descriptions?*

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Benefits of Written Position Descriptions

- ▶ Clear understanding of what is expected.
- ▶ Marketing tool for recruitment.
- ▶ Guide for screening.
- ▶ Basis for supervision and evaluation.
- ▶ Contract between volunteer and agency.
- ▶ Volunteer positions understood by co-workers.

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Key Concept 2

- ▶ Understanding trends in volunteering should impact position design and re-design in your organization.

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Trends in Volunteering

- ▶ Trend
- ▶ Impact
- ▶ Potential Responses

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Sample Trends in Volunteering

- ▶ Short-term volunteering options.
- ▶ Desire for freedom, ability to act quickly.
- ▶ Volunteers want challenging, interesting assignments.
- ▶ Volunteers come from a broader cross-section of society.
- ▶ Volunteers expect to be treated professionally.
- ▶ Volunteers need flexibility in hours.

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Trends in Volunteering

- ▶ Family and group volunteering are popular.
- ▶ People more interested in working for causes than for organizations.
- ▶ Volunteers are often looking for job experience, training, re-entry to employment.
- ▶ Many people with professional skills available to nonprofit organizations.
- ▶ Multitude of motivations for volunteering.
- ▶ More “voluntolds” (e.g., requirement for high school graduation).

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Responses to Volunteer Trends

- ▶ Design episodic, short-term positions.
- ▶ Offer position sharing.
- ▶ Provide group volunteer opportunities.
- ▶ Target recruitment to professionals, youth, retired people, ethnic groups, etc.
- ▶ Offer flexible hours and locations.
- ▶ Organize a substitute system of volunteers.
- ▶ Reimburse volunteer expenses.

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Responses to Volunteer Trends

- ▶ Break down committee work into time-limited task forces.
- ▶ More efficient use of volunteer time.
- ▶ Broaden the ways volunteers are utilized.
- ▶ Develop positions for evenings and weekends.
- ▶ Develop positions that can be performed off-site.
- ▶ Create opportunities for students.

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“Thumbnail” View of Slides (continued)

Key Concept 3

- ▶ Expanding the ways volunteers are utilized within an organization will enable it to more effectively reach its mission.

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Activity: Designing New Volunteer Positions

- ▶ List all the duties of your current position.
- ▶ Put an asterisk next to tasks which:
 - You feel unqualified to perform.
 - You would rather not be doing.
- ▶ List the things you would like to do but do not have the time to perform now (your “Dream List”).

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Activity (continued)

- ▶ Brainstorm programs or services you wish your organization could accomplish but cannot, due to limited resources.
- ▶ Study the flip charts and begin to develop some new, interesting, creative potential volunteer positions from the released tasks and the “Dream List.”
- ▶ Assign a task force to refine these positions and develop new opportunities.

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Key Concept 4

- ▶ Position descriptions should be clearly written and include all essential information.

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Elements in an Ideal Volunteer Position Description

- ▶ Position Title
- ▶ Supervisor
- ▶ Goal or purpose of position
- ▶ Major responsibilities
- ▶ Time commitment
- ▶ Qualifications (required, desired)
- ▶ Work location
- ▶ Benefits to volunteer
- ▶ Date of position design or re-design

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Activity

- ▶ Design a new volunteer position description using the form in the handouts or your own organization's format.

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Summary

- ▶ Sound position design is the foundation of a solid volunteer program, but it should also retain the fluidity necessary to continually undergo change.

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Suggestions for Expanded Activities for Sessions over 55 Minutes:

1. Allow considerably more time for concepts #2 and #3. This seminar would ideally be given in a two-hour time slot or in two one-hour sessions.
2. Identify the five trends most impacting your organization's success at attracting and retaining volunteers. Divide up into five groups, and have each group look at one trend and recommend some ways to respond to the impact. Have small groups report back to larger group.
3. Do concept # 3 (exercise on expanding the utilization of volunteers) in a retreat setting. Allow two to three hours for the complete process of designing new ways to volunteer in your organization. Input will come from a combination of staff releasing work and the visions of activities that staff and volunteers cannot currently do.
4. Bring your agency position description form to the seminar. After thinking through the necessary elements of position design, have participants design a position. Get several participants to share their examples and have group respond.



Suggested Resources on Designing Positions for Volunteers

Ellis, Susan J. "A Fresh Look at Volunteer Job Design." Chapter 2 in *The Volunteer Recruitment (and Membership Development) Book*, 2nd edition. Philadelphia: Energize, Inc., 1996. Order from <http://www.energizeinc.com/bookstore.html> .

Ellis, Susan J. and Steve McCurley. "Thinking the Unthinkable: Are We Using the Wrong Model for Volunteer Work?" *e-Volunteerism: The Electronic Journal of the Volunteer Community*, Vol.III, Issue 3, April-June 2003. <http://www.e-volunteerism.com/quarterly/03apr/pov3c.php> .

Graff, Linda L. "Volunteer Position Design." Chapter 3 in *Best of All: The Quick Reference Guide To Effective Volunteer Involvement*. Dundas, ON: Linda L. Graff & Associates, 2005. Order from <http://www.lindagraff.ca/> .

McCurley, Steve and Rick Lynch. "Creating Motivating Volunteer Jobs." Chapter 4 in *Volunteer Management: Mobilizing All the Resources of the Community*, rev. ed. Kemptville, ON: JTC Publications, 2006. Order from <http://www.energizeinc.com/bookstore.html> or <http://www.bettystallings.com/> .

McCurley, Steve and Rick Lynch. "Creating Meaningful Experiences for Volunteers." Chapter 5 in *Keeping Volunteers: A Guide to Retention*. Olympia, WA: Fat Cat Publications, 2005. Order from <http://www.energizeinc.com/bookstore.html> .

Scheier, Ivan. "Satisfy Staff First." Chapter 3 in *Building Staff/Volunteer Relations*. Philadelphia: Energize, Inc., 2003. Order from <http://www.energizeinc.com/bookstore.html> .



Handout 1

The 4 Key Concepts of Designing Positions for Volunteers

1. Good volunteer position design is pivotal to the ultimate success of a volunteer program.
2. Understanding trends in volunteering should impact the position design and re-design in your organization.
3. Expanding the ways volunteers are utilized within your organization will enable it to more effectively reach its mission.
4. Position descriptions should be clearly written to include key elements.



Handout 2

Purposes of Position Design

1. Provides volunteers with a clear description of their roles or assignments. (To what are they saying "yes"?)
2. A marketing tool for recruitment. (The positions are what you are "selling" to volunteers.)
3. Serves as a primary guide for screening volunteers.
4. Basis for supervision and evaluation. (It is difficult to reward, supervise, or fire someone in a position with unclear expectations.)
5. Serves as a contract between the volunteer and the agency. (It is important to indicate the benefits volunteers receive in the position to make it an *exchange* between the volunteer and the organization.)
6. Provides information about position responsibility, etc. to co-workers of volunteers, thus giving role clarity to both paid and non-paid staff.



Handout 3

Some Notable Trends in Volunteering

1. Volunteers have increasing demands on their time.
2. Volunteers are looking for short-term (episodic) volunteer opportunities.
3. Most volunteers are employed.
4. Volunteers want freedom to act more quickly and thus prefer smaller, locally controlled organizations.
5. Volunteers (especially Baby Boomers) expect challenging and interesting assignments.
6. Volunteers are coming from a broader cross-section of our society (e.g., growing number of professionals, youth, unemployed, ethnically diverse).
7. Today's volunteers expect to be treated professionally.
8. Seniors over 70 are increasing in numbers and volunteer in increasing percentages.
9. Nearly all volunteers need more flexibility and find it difficult to commit to regular hours.
10. Family and group volunteering are gaining in popularity.
11. People are interested in working for causes, not organizations.
12. Many look to volunteering for job experience, training, or as a re-entry experience.
13. There are many people with professional skills available to nonprofit organizations.
14. There are multitudes of motivations for volunteering (work, office, help my family, meet friends, fulfill an obligation such as high school graduation, and more.)



Handout 4

Activity for Designing New Volunteer Positions*

1. List all of the duties in your staff/leadership volunteer position.
2. Put an asterisk next to tasks which:
 - You feel unqualified to perform
 - You would rather not be doing
3. Write some of the tasks that surfaced in #1 and #2 on flip charts posted around the room.
4. List the things you would like to do but do not have time to perform now.
5. Brainstorm the programs, services, etc., you would like the organization to be performing.
6. Post responses from #4 and #5.
7. Study the flip charts and begin to develop some new, interesting, creative potential volunteer positions from the released tasks and dreams of staff and leadership volunteers.
8. Have a small task force refine these positions and develop potential new position descriptions.

* Activity based on Ivan H. Scheier's "Satisfy Staff First." Chapter 3 in *Building Staff/Volunteer Relations*. Philadelphia: Energize, Inc., 2003.



Handout 5

An Ideal Position Description Includes:

Position Title

Supervisor

Goal or Purpose of the Position

Major Responsibilities

Time Commitment

Qualifications (required and desired)

Training and or Preparation Required

Work Location

Benefits to the Volunteer

(Date position was designed or updated)



Participant Evaluation Form

Thank you for taking the time to share your evaluation of today's seminar. Your critique is valued and will be considered as we continually strive to improve our support to all personnel who team with volunteers.

1. Check the appropriate box to indicate whether you **met**, **partially met**, or **did not meet** the following learning objectives for this workshop:
- a. Concur with the significance of good volunteer job design.
 met *partially met* *did not meet*
 - b. Analyze the trends in volunteering and their impact on the design or redesign of volunteer jobs.
 met *partially met* *did not meet*
 - c. Design new volunteer job opportunities within your organization.
 met *partially met* *did not meet*
 - d. Name the necessary components of written job descriptions.
 met *partially met* *did not meet*

Comments:

2. This session was:

- | | | |
|--------------|------------------------------|-----------------------------|
| Helpful: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Provocative: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Practical: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Well-paced: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too short: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too long: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |

Comments:



Training Busy Staff to Succeed with Volunteers: *The 55-Minute Training Series – Evaluation Form*

Participant Evaluation Form (continued)

3. This trainer was:

- Knowledgeable: YES NO
- Prepared: YES NO
- Organized: YES NO
- Enthusiastic: YES NO
- Good discussion facilitator: YES NO

Comments:

4. In what ways can you utilize this material in your work?

5. What, if anything, do you plan to do differently as a result of this training?

6. What additional information on this or any other topic dealing with volunteers would be helpful to you in your work?

7. What suggestions do you have to strengthen this workshop?

8. Further comments or suggestions:

NAME (optional) _____

Training Busy Staff to Succeed with Volunteers: *The 55-Minute Training Series*

PowerPoint® Slides

*To open the attached PowerPoint slides,
double-click the thumbtack icon below.*



Trainer's Guide for Presenting...

Volunteer Recruitment

Betty Stallings

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Volunteer Recruitment

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Key Concepts of Volunteer Recruitment	H-1
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Trainer's Guide for Presenting the *Volunteer Recruitment* Module

Introduction to Volunteer Recruitment

Often when staff or members of an organization are involved in volunteer recruitment, they are so anxious to fill slots or add to the membership that little care is given to finding the *right* people. Everyone can relate to the consequences to the new volunteer and to the organization when the wrong person is recruited. The volunteer feels incompetent and/or unfulfilled, leading to performance and retention problems. The organization does not get the job done well and builds resentment or resistance to further utilization of volunteers.

Successful recruitment involves marketing your organization's volunteer needs to the segment of people who can fill your needs while simultaneously filling their own (e.g., finding a graduate student who needs experience in public relations when you are looking for a person to focus on a PR plan for your new project). Recruitment is not merely following prescribed techniques to attract potential volunteers, but rather designing a *strategy* to find the right volunteer and then utilizing an appropriate outreach technique to invite them to consider becoming a volunteer or member.

It is difficult to isolate the topic of recruitment because its ultimate success is intertwined with the development of good volunteer positions (the product you are selling in recruitment) and with having an organization prepared to utilize volunteers' time and talents effectively when they arrive. It is important, however, to examine how potential volunteers are invited to become a part of your organization, particularly if the recruitment function is not centralized. Even if most volunteers go through a central recruitment process, all staff and volunteers within an organization are a significant part of its informal volunteer recruitment team. Thus, the principles of recruitment should be useful for staff to learn – whether they carry out this function themselves or are general ambassadors for the program.

Learning Objectives

The **primary purpose** of this training module is to explore targeted volunteer recruitment: a strategy of invitation to reach the best people to fill your volunteer positions.



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Upon completion of this module, the participant will be able to:

1. Understand what recruitment is and the impact of doing it well.
2. List some objections and barriers that people might have to volunteering at their organization and some strategies to overcome them.
3. Design an effective recruitment message.
4. Describe the characteristics of effective recruiters.

General Notes to Trainer

1. This workshop is in a suggested format. Feel free, however, to personalize it with your own stories. Also, phrase questions and activities in a manner most attuned to your organization.
2. Even if recruitment is not a primary responsibility of staff, it is helpful for them to understand the key concepts in recruitment. In many ways, staff or other volunteers are involved in the re-recruitment of volunteers every time a volunteer comes in to do assigned tasks. Returning volunteers must continually have their needs met and may need assistance in working through any barriers to volunteering after they are involved.
3. This workshop on recruitment relates directly to the information in the Volunteer Motivation module. You might even want to present that topic first.
4. This module stresses that initial recruitment is the invitation to *consider* volunteering. It would be helpful to have a follow-up, in-service session on Interviewing since it is during an interview that the actual selection and placement occur.
5. Many resource materials on volunteer management cover the topic of volunteer recruitment. For the most comprehensive coverage, however, I would recommend *The Volunteer Recruitment (and Management Development) Book* by Susan J. Ellis (see Resource suggestions in this module).



Presentation Overview

SLIDES/ HANDOUTS	SECTION	METHOD OF PRESENTATION	TIME
S-1 to 3	Introduction <ul style="list-style-type: none"> • Activity • Introduction • Purpose • Learning Objectives • Key Concepts 	Activity/Presentation	8 minutes
H-1			
S-4 to 6	Key Concept 1 Identifying Resistance	Presentation/Activity	10 minutes
H-2			
S-7 to 9	Key Concept 2 Matching needs of volunteer/agency	Interactive Presentation	20 minutes
H-3, H-4			
S-10 to 14	Key Concept 3 Recruitment Message	Interactive Presentation	10 minutes
H-5, H-6, H-7			
S-15 to 16	Key Concept 4 Recruiter qualities	Interactive Presentation	5 minutes
H-8			
S-17	Summary/Wrap-up/ Evaluation	Presentation	2 minutes
H-9			Total: 55 Minutes



Presentation Script

SLIDE/ HANDOUT	SECTION	TIME
	<p style="text-align: center;">Quick Opening Exercise</p> <p>Have participants jot down their thoughts on a definition of "Volunteer Recruitment." Ask a few people to share their ideas.</p>	8 minutes ▼
S-1: Definition	<p>Debrief of Exercise:</p> <p>If any definitions imply that all respondents were automatically invited to become volunteers, share with participants the working definition of recruitment: A process to attract and invite people to <i>consider</i> volunteer involvement within your agency, faith community, or organization.</p> <p>During the interview and screening process, both the individual and the organization mutually decide if a match has been made. The exceptions to this are when the organization needs a large number of people for short-term, low-skill activities (e.g., clean-up day); then, in-depth interviewing and screening are not essential.</p> <p>Continue by sharing a few introductory comments regarding the significance of thoughtful recruitment. You might also start by demystifying the process by sharing the most revealing statistic about recruitment strategies: <i>All</i> research studies on volunteering and giving have discovered that people were more than four times as likely to volunteer when they were personally asked.</p>	
S-2: Learning Objectives S-3: Key Concepts H-1	<p>This discussion leads naturally into the purposes and learning objectives of this seminar. Indicate that this workshop is built on 4 Key Concepts. Share briefly and indicate that each concept will be covered in the seminar.</p>	
S-4: Key Concept 1	<p style="text-align: center;">Key Concept 1</p> <p>Until you identify and address people's possible resistance to volunteering within your organization, you will not reach your potential in volunteer recruitment.</p>	10 minutes ▼



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SLIDE/ HANDOUT	SECTION	TIME	
<p><i>(continued)</i> S-4: Key Concept 1</p>	<p>Presentation: As you design your outreach to prospective volunteers or analyze response from previous efforts at recruitment, you must begin to identify any barriers that may be keeping people from volunteering within your organization. These barriers may be personal (time, child care needs, etc.) or organizational (location of facility, costs involved in volunteering, type of client served, etc.).</p>	<p style="text-align: center;">▲ (same 10 minutes)</p>	
<p>S-5 to 6: Activity H-2</p>	<p>Group Activity Have the group brainstorm organizational and personal barriers as to why people might not respond positively to opportunities to volunteer with your organization. Identify several barriers which your organization might be able to address so as to counter them.</p> <table border="0" style="width: 100%;"> <tr> <td style="width: 50%; vertical-align: top;"> <p style="text-align: center;">Barriers</p> <ul style="list-style-type: none"> • People's limited time • Costs related to volunteering • Distant location of organization • Need flexibility; regular commitment difficult • Type of client that organization serves (homeless, mentally ill, prisoners) </td> <td style="width: 50%; vertical-align: top;"> <p style="text-align: center;">Organization's Response</p> <ul style="list-style-type: none"> • Develop more short term, episodic positions • Offer to cover expenses • Develop positions for people to do at their home/office • Design a back-up substitute system for volunteers • Brainstorm types of people who care about your clients and design targeted recruitment to reach them </td> </tr> </table> <p>Debrief of Activity: Suggest that a task force of people assist you in more deeply addressing these barriers and designing solutions. This exercise should broaden participants' understanding of the many factors influencing successful recruitment.</p>		<p style="text-align: center;">Barriers</p> <ul style="list-style-type: none"> • People's limited time • Costs related to volunteering • Distant location of organization • Need flexibility; regular commitment difficult • Type of client that organization serves (homeless, mentally ill, prisoners)
<p style="text-align: center;">Barriers</p> <ul style="list-style-type: none"> • People's limited time • Costs related to volunteering • Distant location of organization • Need flexibility; regular commitment difficult • Type of client that organization serves (homeless, mentally ill, prisoners) 	<p style="text-align: center;">Organization's Response</p> <ul style="list-style-type: none"> • Develop more short term, episodic positions • Offer to cover expenses • Develop positions for people to do at their home/office • Design a back-up substitute system for volunteers • Brainstorm types of people who care about your clients and design targeted recruitment to reach them 		
<p>S-7: Key Concept 2</p>	<p style="text-align: center;">Key Concept 2</p> <p>For volunteer recruitment to be successful, the needs of the organization and the needs of the volunteer must be met simultaneously.</p>	<p style="text-align: center;">20 minutes ▼</p>	



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SLIDE/ HANDOUT	SECTION	TIME
S-8: Jigsaw Puzzle H-3	<p>Facilitator Presentation: Too often we are tempted to fill positions without thinking of whether the needs of the organization and the needs of the volunteer will be met. In our desperation to fill slots, we take the first person who is willing to do the job. It is much like the person who is in a rush to complete a jigsaw puzzle and tries to push the wrong piece into the puzzle. You may wish to use this analogy with the puzzle on slide 8, H-3 to illustrate what happens to the organization (which the puzzle represents) and the volunteer (a puzzle piece) when this hasty method is used.</p>	<p style="text-align: center;">▲ (same 20 minutes)</p>
S-9: Recruitment Techniques to Avoid	<p>Very often we recruit people, not taking into account whether the volunteer's needs will be met. Choose a few examples from slide 9 which highlight recruitment techniques to avoid.</p> <ul style="list-style-type: none"> ● Bait and switch (You will lose trust of volunteer) ● "There's nothing to it." (message: Any dummy can do it!) ● "We're desperate, anyone will do..." (How special does that feel?) ● Cast your nets and see who swims in... (Whoops! wrong fish!) ● "You're a CPA. We could use one of you!" (making assumptions) ● "We have lots of needs...HELP!" (people respond to specifics) ● "I'm tired of doing it. Anyone else want to do it?" (wrong recruiter) <p>Activity (optional): If time permits, ask participants if they have ever had these techniques used on them – and how they felt.</p> <p>The best strategy for finding the right volunteer is to use marketing principles which involve an exchange in values (e.g., our volunteer job fits the person's interests and skills).</p>	
H-4: Recruitment Strategy Worksheet	<p>If appropriate, give participants the handout (H-4) which walks through questions that you need to address if you are using a marketing strategy to recruit volunteers. (A 55-minute session will not allow time to utilize this tool.)</p>	
S-10: Key Concept 3	<p style="text-align: center;">Key Concept 3</p> <p>The recruitment invitation must, minimally, include 3 elements: the statement of need, how the volunteer can help, and benefits of the position.</p>	<p style="text-align: center;">10 minutes ▼</p>



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SLIDE/ HANDOUT	SECTION	TIME
S-13 to14 Sample Recruitment Message H-5, 6: Sample Recruitment Messages H-7: Writing Volunteer Recruitment Message	<p>Show examples of how other organizations have used this formula to design their recruitment message. If possible, design and share a message developed for your organization.</p> <p>If you have time, have participants write their own recruitment message, using H-7.</p>	<p style="text-align: center;">▲</p> <p>(same 10 minutes)</p>
S-15: Key Concept 4 H-8: Best Volunteer Recruiters	<p>Key Concept 4</p> <p>It is important to have effective, trained people recruiting new volunteers.</p>	<p>5 minutes</p> <p style="text-align: center;">▼</p>
S-16: Best Volunteer Recruiters	<p>Presentation:</p> <p>Point out that generally the best recruiters are volunteers in the organization. Ask participants what qualities to look for before asking someone to officially serve in that role.</p> <p>Suggest that the keys to success include all of their suggestions, but four characteristics are especially beneficial. Successful volunteers are:</p> <ul style="list-style-type: none"> ● Satisfied with their volunteer work with the organization (not burned out, tired ones looking for replacements). ● Enthusiastic (you may wish to note that the word enthusiasm ends with IASM - I am sold myself!). ● Articulate (some people can't express their obvious pleasure so that others catch the fire!). ● Connected with the person or group being recruited (people say yes to people they know and respect). 	
S-17: Summary H-9: Evaluation	<p>Summary/Wrap-up/Evaluation</p> <p>Time permitting, review the Key Concepts of the module.</p> <ul style="list-style-type: none"> ● Remember that volunteer recruitment is a process to attract and invite people to <i>consider</i> volunteer involvement within your organization. ● Address possible barriers. ● There must be mutual benefits. ● Design an effective message. ● Select and train people to recruit. <p>Distribute Participant Evaluation forms.</p> <p>End 55-Minute Training.</p>	<p>2 minutes</p> <p style="text-align: center;">▼</p>



Training Busy Staff to Succeed with Volunteers: The 55-Minute Training Series

“Thumbnail” View of Slides

Training Busy Staff
to Succeed with Volunteers:
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*Volunteer
Recruitment*

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*Definition:
Volunteer Recruitment*

- ▶ A process to attract and invite people to *consider* volunteer involvement within your agency, faith community, or organization.

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Learning Objectives

- ▶ Understand what recruitment is and the impact of doing it well.
- ▶ List objections and barriers to volunteering...and some strategies to overcome them.
- ▶ Design an effective recruitment message.
- ▶ Describe characteristics of effective recruiters.

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4 Key Concepts

1. Until you address people's possible resistance to volunteering, you will not reach your potential in volunteer recruitment.
2. For volunteer recruitment to be successful, the needs of the organization and the needs of the volunteer must be met simultaneously.
3. The recruitment invitation must, minimally, include 3 elements.
4. Effective, trained people should recruit volunteers.

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Key Concept 1

- ▶ Until you identify and address people's possible resistance to volunteering within your organization, you will not reach your potential in volunteer recruitment.

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Activity

- ▶ Identify any organizational or personal barriers that may keep prospective volunteers from responding positively to opportunities to work in our organization.

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<i>Barriers</i>	<i>Responses</i>
People's limited time	
Costs related to volunteering	
Distant location of organization	
Need flexibility; regular commitment difficult	
Type of client that organization serves	

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Key Concept 2

- ▶ For volunteer recruitment to be successful, the needs of the organization and the needs of the volunteer must be met simultaneously.

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S-8 © 2007, Betty B. Stallings - Energize, Inc.

Recruitment Techniques to Avoid

- ▶ Bait and Switch
- ▶ "There's nothing to it."
- ▶ "We're desperate; anyone will do."
- ▶ Cast your net and see who swims in.
- ▶ "You're a CPA. We could use one of you!"
- ▶ "We have lots of needs...HELP!"
- ▶ "I'm tired of doing it. Anyone else want to?"

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Key Concept 3

- ▶ The recruitment invitation must, minimally, include 3 elements:
 - The statement of need. (The need of *clients*, not of the agency!)
 - How the volunteer can help.
 - Benefits of the position to the volunteer.

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Invitation Example 1

- ▶ Statement of client need
 - They have gloves, bats and softballs, but no coach. Seventy-five mentally-challenged boys and girls are waiting for a coach.
- ▶ How to help
 - Don't let them strike out. Join our Special Olympics Team! Call 1-800-Gold today!
- ▶ Benefits
 - You'll never feel more appreciated (and you'll get some exercise, too!).

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“Thumbnail” View of Slides (continued)

Invitation Example 2

- ▶ Statement of client need
 - *Many Seniors in our community are not eating balanced meals and are suffering from malnutrition.*
- ▶ How to help
 - *You can give three hours to chop, slice, spread, boil, wrap, and pack food with our chef and other great folks.*
- ▶ Benefits
 - *Knowing you've made a difference, enjoying your team, and learning how to cook in large quantities!*

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Sample Recruitment Message

Every 15 seconds a woman is beaten in this country. Every 15 seconds her partner shares in her loss of self-esteem. Their children are learning how to behave in relationships. You can help stop this cycle of violence and learn valuable communication skills by serving as a volunteer with the Battered Women's Alternatives Hotline. In the next 15 seconds, you can make a difference!

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Family Recruitment Message

Many elderly in our community live lonely stretches without a warm smile or embrace. Your family could volunteer to "adopt" one of these senior residents. The members of your family will experience some rare quality time together while giving someone's grandma or grandpa a real lift.

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Key Concept 4

- ▶ It is important to have effective, trained people recruiting new volunteers.

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Best Volunteer Recruiters

- ▶ Volunteers who are:
 - Satisfied
 - Enthusiastic
 - Enthusiasm ends with IASM: I Am Sold Myself!*
 - Articulate
 - Connected with the person or group being recruited

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Summary

- ▶ Remember that volunteer recruitment is a process to attract and invite people to *consider* volunteer involvement within your organization.
- ▶ Address possible barriers.
- ▶ There must be mutual benefits.
- ▶ Design an effective message.
- ▶ Select and train people to recruit.

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Suggestions for Expanded Activities for Sessions over 55 Minutes:

1. If participants in this training are responsible for their own recruitment, additional in-depth training can be provided, utilizing this module as a framework for its development.
2. Have small groups look at barriers people might have to volunteering in your organization. Each group identifies the five key barriers people might face, and then passes the list to another group. The new assignment is to discuss how and if the organization can do anything to help alleviate these barriers. Full group sharing would follow. This exercise sensitizes groups to the reasons why they might not be attracting volunteers and gives them an opportunity to discuss: new volunteer position development, PR efforts regarding the agency and its clients, more flexibility in positions, concentration on issues of staff resistance and climate, etc. This focus will lead to the design of new ways to make the organization more attractive to volunteers. Strategies for outreach could follow.
3. Have participants design some targeted recruitment messages utilizing information described in Concept 3 (the design of a recruitment message). If the organization has developed recruitment materials, share them with the participants and critique them with reference to the three key elements.
4. Qualities of good recruiters may be best discussed by having participants think of a time when they said "Yes" to a volunteer position. Remember what qualities the recruiter had or the techniques utilized that influenced them to say, "Yes!" Some participants who said "Yes" may share experiences because they were misled or had their arms twisted; most often, they will not ultimately express positive feelings about the experience. Others said "Yes" to a recruiter who was not only enthusiastic and persuasive but who also reflected an accurate picture of the position and was interested in the benefits to the organization as well as to the volunteer. Using participants' own experiences is fertile material for many lessons in recruitment. It does take time to process these, but the insights gained are beneficial.



Suggested Resources on Recruiting Volunteers

Books

Ellis, Susan J. *The Volunteer Recruitment (and Membership Development) Book, Third Edition*. Philadelphia: Energize, Inc., 2002. Order from <http://www.energizeinc.com/bookstore.html> .

Also available: *Outreach in Cyberspace: Appendix to the Third Edition of the The Volunteer Recruitment Book* by Susan J. Ellis. Order from <http://www.energizeinc.com/bookstore.html> .

Esmond, Judy. *Count Me In! 501 Ideas on Recruiting Volunteers*. Order from <http://www.morevolunteers.com> .

Graff, Linda. "Recruitment." Chapter 4 in *Best of All: The Quick Reference Guide To Effective Volunteer Involvement*. Dundas, ON: Linda Graff and Associates Inc., 2005. Order at <http://www.lindagraff.ca/> or the e-book edition at <http://www.energizeinc.com/bookstore.html> .

McCurley, Steve and Rick Lynch. *Volunteer Management: Mobilizing all the Resources of the Community*, revised ed. Kemptville, ON: Johnstone Training and Consultation, Inc., 2006. Order at <http://www.energizeinc.com/bookstore.html> and <http://www.bettystallings.com/> .

Articles

Articles from *e-Volunteerism* can be found at <http://www.e-volunteerism.com> .

Casey, Maria H. "Creating A Fear-Less Speakers Bureau Program." *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. VI, Issue 3 April-June 2006.

McCurley, Steve. "PSA's and Volunteer Recruitment Campaigns." *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. IV, Issue 4, July-October 2004.

McCurley, Steve. "A User's Guide to Online Volunteer Recruitment Sites." *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. 1, Issue 2, Winter 2001.

Stallings, Betty. "Six Training Exercises to Enhance Recruitment of Volunteers." *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. II, Issue 1, October-December 2001.



Handout 1

The 4 Key Concepts of Recruiting Volunteers

1. Until you identify and address people's possible resistance to volunteering within your organization, you will not reach your potential in volunteer recruitment.

2. For volunteer recruitment to be ultimately successful, the needs of the organization and the needs of the volunteer must be simultaneously met.

3. The recruitment invitation must, minimally, include three elements.
 - Statement of need
 - How the volunteer can help
 - Benefits to the volunteer

4. It is important to have effective, trained people recruiting new volunteers.



Handout 2

Addressing Possible Organizational/Personal Barriers to Volunteering in our Organization

Barriers to Recruitment in our Organization (*list some*):

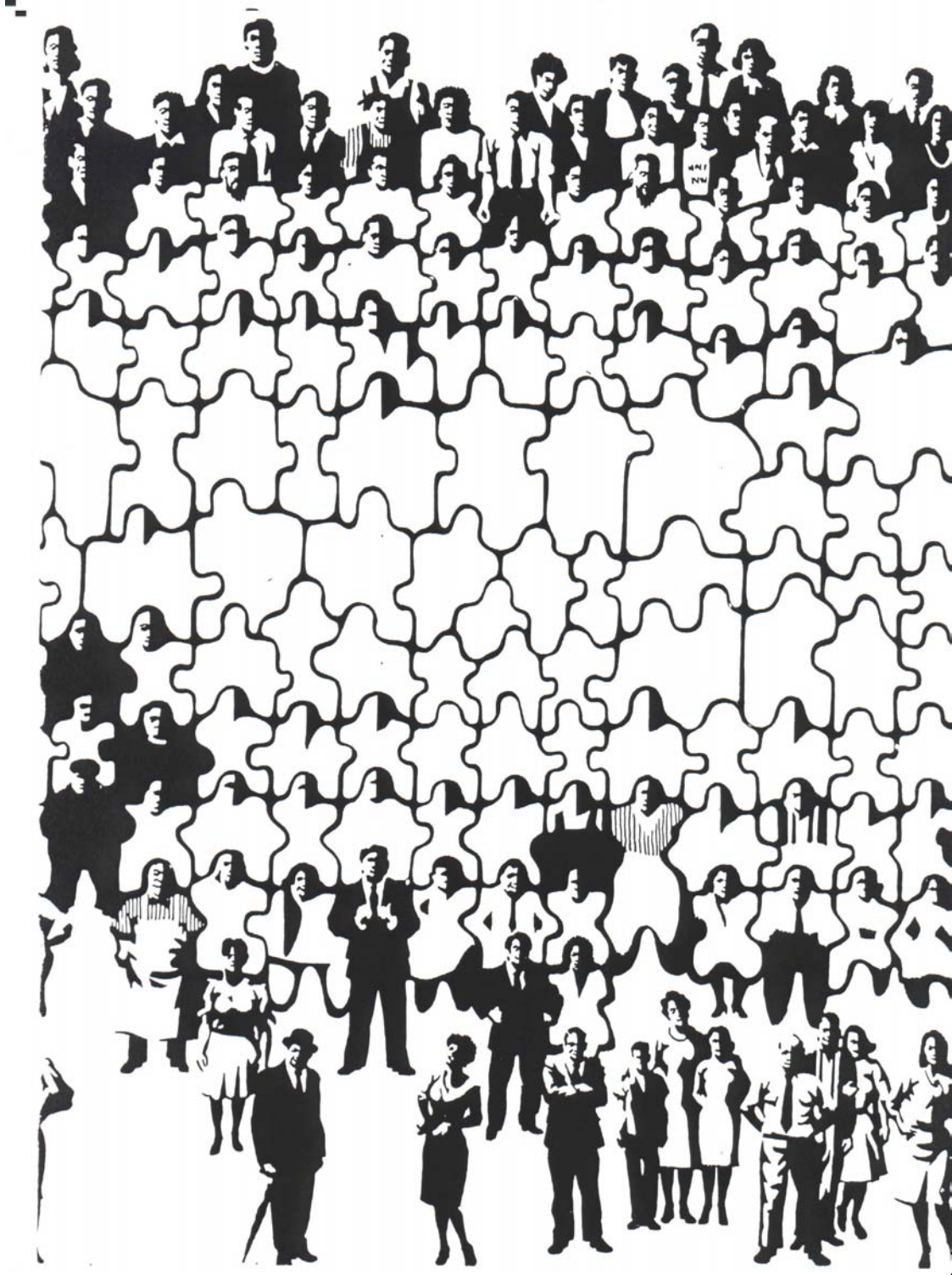
- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

What are some strategies to begin to diminish our barriers to attracting volunteers to our organization/program?

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.



Handout 3





Handout 4

Recruitment Marketing Strategy Worksheet

1. Volunteer Position description (summary):
2. Skills and qualities needed to perform this job:
3. What types of people are most apt to have these qualities?
(age, gender, educational level, experiences - what types of people have made the best volunteers in this position previously?)
4. What are the best sources for finding my needed volunteer(s)?
(service clubs, corporations, colleges, youth clubs, VolunteerMatch, Volunteer Centers, etc.)
5. What techniques or methods would be most appropriate to gain access to them?
(friend or colleague to personally ask, speak to local clubs, talk to classes at the local college, Public Service Announcement on teen radio station, etc.)
6. What benefits will these volunteers receive by doing this job?
(e.g. , what exchange are we offering them: work experience, networking opportunities, making a difference)
7. Who is the best person to do the recruitment and why?



Handout 5

Examples of Recruitment Invitations

Example 1:

- ▶ Statement of client need
 - *They have gloves, bats and softballs, but no coach. 75 mentally-challenged boys and girls are waiting for a coach.*
- ▶ How to help
 - *Don't let them strike out. Join our Special Olympics Team! Call 1-800-Gold today!*
- ▶ Benefits
 - *You'll never feel more appreciated (and you'll get some exercise, too!).*

Example 2:

- ▶ Statement of client need
 - *Many Seniors in our community are not eating balanced meals and are suffering from malnutrition.*
- ▶ How to help
 - *You can give three hours to chop, slice, spread, boil, wrap, and pack food with our chef and other great folks.*
- ▶ Benefits
 - *Knowing you've made a difference, enjoying your team, and learning how to cook in large quantities!*



Handout 6

Sample Recruitment Messages

Every 15 seconds a woman is beaten in this country. Every 15 seconds her partner shares in her loss of self-esteem. Their children are learning how to behave in relationships. You can help stop this cycle of violence and learn valuable communication skills by serving as a volunteer with the Battered Women's Alternatives Hotline. In the next 15 seconds, you can make a difference!

One out of five Americans can't read this message! By volunteering to teach an adult to read and write, you can open a world of opportunity for some who might otherwise be limited – stuck! We'll provide the training, you set the time and place of the lessons. Call Project Read at 555-877-5329.

Many elderly in our community live lonely stretches without a warm smile or embrace. Your family could volunteer to “adopt” one of these senior residents. The members of your family will experience some rare quality time together while giving someone's grandma or grandpa a real lift.

Infant car injury and death can be reduced by 75% with the use of infant car seats. You can make infant car seats available to new parents by volunteering to demonstrate these seats each Wednesday at North County Hospital. You will receive gratification from knowing you are helping to save the lives of our most valuable resource – our children.



Handout 7

Three Parts of a Recruitment Message Worksheet

Develop a recruitment message for an existing or new position in your organization. Jot down notes under each element and then write your full but brief recruitment message including these elements:

I. Statement of Client Need:

II. How the Volunteer can Help:

III. The Benefits to the Volunteer:

Recruitment Message:



Handout 8

Best Volunteer Recruiters

Volunteers who are:

1. **Satisfied** with their volunteer work with the organization (not burned out, tired ones looking for replacements).
2. **Enthusiastic** about their volunteer work.
3. **Articulate** and able to express their pleasure in such a way that others catch the fire and wish to volunteer, too!
4. **Connected** with the person or group being recruited. People say yes to people they know and respect!

Personal Recruitment Memory:

1. Think about the best experience you have had being recruited to volunteer.....

2. What attributes/qualities/message did the recruiter have that persuaded you to look into the volunteer opportunity?



Participant Evaluation Form

Thank you for taking the time to share your evaluation of today's seminar. Your critique is valued and will be considered as we continually strive to improve our support to all personnel who team with volunteers.

1. Check the appropriate box to indicate whether you **met**, **partially met**, or **did not meet** the following learning objectives for this workshop:

a. Understand what recruitment is and the impact of doing it well.

met *partially met* *did not meet*

b. List some objections and barriers that people might have to volunteering at their organization and some strategies to overcome them.

met *partially met* *did not meet*

c. Design an effective recruitment message.

met *partially met* *did not meet*

d. Describe the characteristics of effective recruiters.

met *partially met* *did not meet*

Comments:

2. This session was:

Helpful: YES NO

Provocative: YES NO

Practical: YES NO

Well-paced: YES NO

Too short: YES NO

Too long: YES NO

Comments:



Training Busy Staff to Succeed with Volunteers:
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Participant Evaluation Form (continued)

3. This trainer was:

- Knowledgeable: YES NO
Prepared: YES NO
Organized: YES NO
Enthusiastic: YES NO
Good discussion facilitator: YES NO

Comments:

4. In what ways can you utilize this material in your work?

5. What, if anything, do you plan to do differently as a result of this training?

6. What additional information on this or any other topic dealing with volunteers would be helpful to you in your work?

7. What suggestions do you have to strengthen this workshop?

8. Further comments or suggestions:

NAME (optional) _____

Training Busy Staff to Succeed with Volunteers: *The 55-Minute Training Series*

PowerPoint® Slides

*To open the attached PowerPoint slides,
double-click the thumbtack icon below.*



Trainer's Guide for Presenting... *Interviewing* *Volunteers*

Betty Stallings

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Interviewing Volunteers

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Trainer's Guide for Presenting the *Interviewing Volunteers* Module

Introduction to Interviewing

Interviewing candidates for a volunteer position is imperative to ensure that the organization is selecting the most qualified person. A key outcome of conducting an interview is the mutual acquaintance of the volunteer applicant and the prospective volunteer supervisor. Thus, if a prospective volunteer first receives a screening interview from the Director of Volunteers, it should be followed by an interview with the person who will eventually serve as the volunteer's supervisor.

The interviewer guides a discussion to determine if there is a good match between the interests and needs of the organization and the volunteer. This often involves some mutual negotiations so that both parties are winners. Without this significant screening step, many misplaced or inappropriate volunteers begin to work for organizations, and both the volunteer and the organization become dissatisfied. When the wrong person is in the volunteer job, the efforts of volunteer supervision are often distracted by the inevitable problems of poor performance, volunteer dissatisfaction, staff complaints, etc.

Because organizations need to be concerned about risk management for the client, staff and volunteer, effective interviewing and screening are no longer optional activities in a well-run volunteer program. When asking staff and volunteers to interview other prospective volunteers, however, we must provide training in the skills involved in effective interviewing. This module is an introductory training in this significant skill.

Learning Objectives

The **primary purposes** of this module are to:

- Examine the need for interviewing volunteers.
- Share the basic process and skills necessary to interview effectively.

Upon completion of this module, the participant will be able to:

1. Discuss the importance and purposes of having interviews with prospective volunteers.
2. Review or initiate the four key steps in the interview process.



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3. Design relevant interview questions and review the essential role of listening during the interview process.
4. Propose options for handling challenging situations that occur during interviews.

General Notes to Trainer

1. This workshop is in a suggested format. Feel free, however, to personalize it with your own stories. Also, phrase questions and activities in a manner most attuned to your organization.
2. Although the focus of this module is interviewing *volunteers*, the skill is a generic one which may have broader applicability to the participants. In fact, you may want to consult with the human resources/personnel manager in your agency about the ways employment applicants are interviewed (you might even consider team training with this staff member).
3. Most people have had many experiences being poorly interviewed. Having participants recall personal experiences of being interviewed *effectively* will immediately begin to reinforce the art and skills involved.
4. It is important to reiterate that this is a cursory overview of the skill of interviewing. Because of the significance of the interview in determining success in matching volunteers, I would recommend that you request that this seminar be longer than 55 minutes. The in-service could also be offered in two time slots, allowing for some role play or other experiential learning activities.
5. Because there are four concepts to cover, presentations and facilitation must be crisp and timed. If participants want more information, use this as an opportunity to ask for future additional training time on the topic.
6. Risk management is a topic closely aligned with interviewing because of the importance of screening applicants. Either provide additional resources about risk management for further study or combine the subject with this one in a longer workshop. (The complete *The 55-Minute Training Series* includes a module on Risk Management.)
7. There are numerous resources on interviewing. Books that I discovered to be particularly useful or applicable to interviewing of volunteers are mentioned under Resources at the end of this training module.



Presentation Overview

SLIDES/ HANDOUTS	SECTION	METHOD OF PRESENTATION	TIME
S-1 to 4	Introduction <ul style="list-style-type: none"> • Purpose of Workshop • Introductory Comments • Learning Objectives • Opening Exercise • 4 Key Concepts 	Presentation	10 minutes
H-1			
S-5 to 6	Key Concept 1 Importance of Interviewing	Presentation & Discussion	5 minutes
H-2			
S-7 to 11	Key Concept 2 Steps in Interviewing	Presentation & Facilitated Discussion	15 minutes
H-3			
S-12 to 16	Key Concept 3 Skills in Interviewing	Presentation & Activity	15 minutes
H-4, H-5			
S-17 to 18	Key Concept 4 Special Problems in Interviewing	Brainstorm & Problem Solve	8 minutes
S-19	Summary/Wrap-up/ Evaluation	Presentation	2 minutes
H-6			
			Total: 55 Minutes



Presentation Script

SLIDE/ HANDOUT	SECTION	TIME
S-1: Interviewing Activity	Opening Exercise	10 minutes ▼
	<p>To get the participants thinking about good interviewing skills, start by asking them to think of a time when they left an interview and thought: "Wow, that person really did a good job interviewing me."</p>	
	<p>Ask participants to share: What were the good skills and qualities of this interviewer? You may wish to <u>record responses</u> or have a recorder write them on a flip chart.</p> <p>In this feedback session, participants will most likely mention the following observations:</p> <ul style="list-style-type: none"> • "Well thought-out questions." • "Good listener. I really felt heard." • "Kept control without the feeling of being controlled." • "Good eye contact" (may vary in different cultures). • "Guided discussion well." • "Let me talk most of the time." • "Encouraging and supportive." • "Clear about purpose." • "No interruptions." • "Private setting." • "Gave me time to reflect before answering." • "Showed genuine interest." • "Let me feeling intact, even if I wasn't chosen." <p>If some key skills are not mentioned you can fill them in with your own observations of good interviewing skills.</p>	
	<p>Summarize the key learning of this exercise: <i>Much is learned about the art and skills of good interviewing by analyzing someone who interviewed you well.</i></p>	
	<p>Introduction (optional) Summarize purpose and give some introductory comments on interviewing</p>	▲



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SLIDE/ HANDOUT	SECTION	TIME
<p>S-2: Learning Objectives</p> <p>S-3 to 4: Key Concepts</p> <p>H-1: Key Concepts of Interviewing</p>	<p>Learning Objectives</p> <p>Share learning objectives of workshop</p> <p>This in-service training is built on 4 Key Concepts.</p> <p>(Proceed through the slides, highlighting each concept in turn. Indicate that during the workshop each concept will be examined together with relevant material.)</p> <p>You may choose to distribute all handouts for this module at this time. Then participants can fully participate in the discussion, knowing that their handouts cover all key information shared in the seminar.</p>	<p>(same 10 minutes)</p>
<p>S-5: Key Concept 1</p>	<p style="text-align: center;">Key Concept 1</p> <p>The primary purposes of interviewing volunteers are to determine a mutual fit between the candidate and the organization, and to screen for risks to the volunteer, the organization, and the clients if the prospective volunteer is chosen.</p> <p>Presentation:</p> <p>1. Paraphrase: It is important to understand that during an interview, there is <i>mutual screening</i> (e.g., the agency is discovering if they have the right person and the volunteer is evaluating whether his/her desires, needs, and skills can be met in this volunteer opportunity). No longer can we as agency people say, "Here are our needs - can you fill them?" The process, if done well, is one of negotiation so that both are winners.</p>	<p>5 minutes ▼</p>
<p>S-6: Importance of Screening</p> <p>H-2: Why Interview?</p>	<p>2. Ask participants to mention (or you may present) other reasons that screening through interviewing is important to the organization. Touch on relevant impact of screening issues with regard to:</p> <ul style="list-style-type: none"> • Clients (protection, particularly if vulnerable) • Staff and volunteer morale (a volunteer who causes "grief" in the organization severely affects morale) • Agency reputation (impacts future attraction of human and financial resources to the organization) 	



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SLIDE/ HANDOUT	SECTION	TIME
S-7: Key Concept 2 H-3(a) to 3(c): 4 Key Steps	<p style="text-align: center;">Key Concept 2</p> <p>There are 4 Key Steps in the interview process: Preparation, Opening, Body, and Closing.</p> <p>Present each step with key points.</p>	15 minutes ▼
S-8: Preparation	<p>1. Preparation Ask participants what they do to prepare for an interview. Add the following information if not mentioned and if pertinent to your situation:</p> <ul style="list-style-type: none"> • Review all information about the applicant. • Review pertinent information on volunteer position(s). • Compile all relevant information on the agency. • Formulate or use prepared questions to bring out desired information to screen for suitability for the position(s). • Schedule adequate time and arrange for a private, comfortable place to interview. • Cast aside all distractions!!! 	
S-9: Opening	<p>2. Opening and Greeting Ask participants to suggest essential elements of the opening of an interview session.</p> <p>Add the following if not mentioned:</p> <ul style="list-style-type: none"> • Put applicant at ease, establish rapport. • Clarify purpose of interview ("to determine if we have a match"). • Establish appropriate time frame for interview. 	
S-10: Body of Interview	<p>3. Body of Interview Share three basic sections of an interview:</p> <p>(1) General information on your program, agency, group, etc., if applicant is unfamiliar with it.</p> <p>(2) Applicant shares information about him/herself in response to thoughtful questioning. Explore such things as may be appropriate:</p> <ul style="list-style-type: none"> • skills • interests • experience • time availability • work or leadership style • motivation for wanting this job or volunteer with this organization 	



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SLIDE/ HANDOUT	SECTION	TIME
<i>(continued)</i> S-10: Body of Interview	<i>(continued)</i> Three basic sections of an interview: (3) Interviewer shares information on appropriate volunteer positions or considers options of involvement other than those available in existing positions.	▲ (same 15 minutes)
S-11: Closing	4. Closing Share key elements of the close of an interview (1) Review and summarize key information surfaced in the interview. (2) Discuss next steps: • <i>If mutual acceptance:</i> Discuss how volunteer can become active. • <i>If no match:</i> Encourage honest sharing. Refer person to other agencies utilizing volunteers, to a Volunteer Center, or to Volunteer Match or other electronic volunteer matching services. (3) Express appreciation for his/her time.	
S-12: Key Concept 3	Key Concept 3 Two essential skills in interviewing are: (1) Designing and asking questions based on an analysis of the position and required qualifications (2) Reflective listening assuring that both individuals are hearing and understanding.	15 minutes ▼
S-13: Asking Questions H-4: Critical Step: Questions	Discuss and lead activities regarding the two key skills: 1. Asking Questions The most important skill is learning to word questions in a way that will elicit the information you need to make decisions about the suitability of a prospective volunteer. It is best to use open-ended questions – those not answered by one or two words – to get expanded information (refer to examples in H-4).	



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SLIDE/ HANDOUT	SECTION	TIME
<p><i>(continued)</i> S-13: Asking Questions H-4: Critical Step: Questions</p>	<p>Activity/Example to support learning: Ask participants, "If you want to ascertain whether the person you are interviewing can work in a busy, noisy office, how would you phrase the question?" Give participants a minute to suggest a question and have a few share their suggestions.</p> <p>Possible participant response: "Describe an ideal work setting which best suits your working style." If the prospective volunteer answers, "Alone in a quiet room," you know you don't have a match!</p> <hr/> <p>Designing Interview Questions Ask participants to focus on the importance of developing several key questions to elicit information needed to determine a candidate's suitability for a specific position.</p> <p>Activity: Using their own situations, have participants write down:</p> <ol style="list-style-type: none"> 1. The volunteer position and its requirements 2. The characteristics of the ideal person for the position 3. A series of questions which will assist them in getting an accurate view of the candidate's qualifications and motivation. <p>Debrief: Invite a few participants to share. Have a few good examples of questions to ask volunteers when they apply for positions within your organization.</p>	<p>▲ (same 15 minutes)</p>
<p>S-14: Core Questions</p>	<p>Core Questions If several volunteers interview for the same position, asking them the same core questions may be very helpful in selecting the best candidate(s). Situational questions are frequently the best way to determine how a person might react in a situation that someone in this position may experience. Examples of possible core questions for a specific leadership position include:</p> <ol style="list-style-type: none"> 1. If you notice that another volunteer is not following organizational policies/procedures, what would you do (not do) upon noticing this? 2. What challenges do you foresee occurring in this position and how would you address them? 3. How long do you see yourself being able to carry out this position? 	



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SLIDE/ HANDOUT	SECTION	TIME
<p>S-15 to 16: Listening</p> <p>H-5: Critical Step: Listening</p>	<p>2. Listening Review basic principles of good listening on H-5. You may wish to start the discussion by asking participants why it is so difficult to listen. (Answers: you are preparing to respond, distracted, evaluating them or their opinions, not listening for understanding, etc.)</p> <hr/> <p style="text-align: center;">Summary to Concept 3</p> <p>Remind participants that there are many interviewing skills. This is simply a cursory training to give a few tips and techniques to improve their skill. Encourage them to further refine this skill if it is not fully developed. Interviewing is where you make the ultimate decision about whether or not an individual will be volunteering for you. Don't treat it lightly!!! If you say "yes" to the wrong person, neither of you will benefit.</p>	<p style="text-align: center;">▲</p> <p style="text-align: center;">(same 15 minutes)</p>
<p>S-17: Key Concept 4</p>	<p style="text-align: center;">Key Concept 4</p> <p style="text-align: center;">It is important to prepare for special challenges that might present themselves during the interview.</p> <hr/> <p>Special Problems: Have participants brainstorm a list of some special problems or challenges they have run into or anticipate experiencing in interviewing. Lead problem-solving discussions as to suggested approaches and solutions. Or, you may share five or so problems most likely to be experienced in your program, and problem solve around them.</p>	<p style="text-align: center;">8minutes</p> <p style="text-align: center;">▼</p>
<p>S-18: Possible Interviewing Challenges</p>	<p>Suggestions:</p> <ul style="list-style-type: none"> • The very shy • The very talkative • Unmotivated (fulfilling an obligation, etc.) • Attitude problem displayed but has skills • Wants position but is not qualified • Short-term volunteers • Phone interviews • On-line interviewing for virtual volunteer position 	
<p>S-19: Summary</p> <p>H-6: Evaluation Form...</p>	<p style="text-align: center;">Summary/Wrap-up/Evaluation</p> <p>Paraphrase: Nothing you do will impact the volunteer program more positively than effective interviewing and mutual screening. When the right people are in the right jobs, the role of volunteer supervisor is a pleasure!</p> <p>Distribute Participant Evaluation forms.</p> <p>End 55-Minute Training.</p>	<p style="text-align: center;">2 minutes</p> <p style="text-align: center;">▼</p>



Training Busy Staff to Succeed with Volunteers: The 55-Minute Training Series

“Thumbnail” View of Slides

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to Succeed with Volunteers:
The 55-Minute Training Series

Interviewing Volunteers

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Activity

- ▶ What were the skills and qualities of the interviewer?
- ▶ *Much is learned about the art and skills of good interviewing by analyzing someone who interviewed you well.*

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Learning Objectives

- ▶ To discuss the importance and purposes of having interviews with prospective volunteers.
- ▶ To review or initiate the four key steps in the interview process.
- ▶ To design relevant interview questions and review the essential role of listening during the interview process.
- ▶ To propose options for handling challenging situations that occur during interviews.

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4 Key Concepts

1. The primary purposes of interviewing volunteers are to determine a mutual fit between the candidate and the organization, and to screen for risks.
2. There are 4 Key Steps in the interview process: Preparation, Opening, Body and Closing.

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4 Key Concepts

3. Two essential skills in interviewing are designing and asking questions and reflective listening
4. It is important to prepare for special problems that might present themselves during the interview.

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Key Concept 1

- ▶ The primary purposes of interviewing volunteers are to determine a mutual fit between the candidate and the organization, and to screen for risks to the volunteer, the organization, and the clients if the prospective volunteer is chosen.

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Importance of Screening

- ▶ **Mutual** screening
- ▶ To protect clients.
- ▶ To maintain paid staff and volunteer morale.
- ▶ To guard the agency's reputation.

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Key Concept 2

- ▶ There are 4 Key Steps in the interview process: Preparation, Opening, Body and Closing.

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Preparation

- ▶ Review what you know about the applicant.
- ▶ Review pertinent information about the available volunteer position(s).
- ▶ Assemble material about the agency.
- ▶ Formulate questions.
- ▶ Schedule adequate time.
- ▶ Arrange for private, comfortable place.
- ▶ Cast aside all distractions.

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Opening

- ▶ Greet and put applicant at ease, establish rapport.
- ▶ Clarify the purpose of the interview:
"...to determine if we have a match..."
- ▶ Establish timeframe for interview.

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Body of Interview

- ▶ There are three basic sections of an interview:
 - You provide information on the agency, program, clients served, etc.
 - Applicant shares information about him/herself through thoughtful questioning.
 - You describe available volunteer positions or other options for involvement.

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Closing

- ▶ Review and summarize what surfaced during the interview.
- ▶ Discuss next steps:
 - *If mutual acceptance:* explain how volunteer becomes active.
 - *If no match:* encourage honest sharing and refer elsewhere.
- ▶ Express appreciation for his/her time.

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“Thumbnail” View of Slides (continued)

Key Concept 3

- ▶ Two essential skills in interviewing are:
 - Designing and asking questions based on an analysis of the position and required qualifications
 - Reflective listening assuring that both individuals are hearing and understanding.

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Designing and Asking Questions

- ▶ Word questions to elicit the information you need.
- ▶ Open-ended questions are best.

Activity:

- ▶ Write down:
 - Volunteer position requirements.
 - Desired characteristics of ideal volunteer.
 - Questions to elicit useful screening information.

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Core Questions

- ▶ When several applicants interview for the same volunteer position, ask them all some core questions so you can compare their suitability.
- ▶ Situational questions determine how the person might react to specific experiences.

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Listening

- ▶ Listen to understand what is meant – not to get ready to reply, contradict, or refute.
- ▶ What is meant involves more than words (tone of voice, facial expression, overall behavior).
- ▶ Don't interpret too quickly. Look for clues and put yourself in the speaker's shoes.
- ▶ Put aside your own views and opinions for the time being.

Realize that you cannot listen to yourself inwardly and at the same time listen outwardly to the speaker.

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Listening

- ▶ Control impatience – listening is faster than talking.
- ▶ Do not prepare to answer while listening.
- ▶ Show interest and alertness.
- ▶ Do not interrupt.
- ▶ Ask questions to secure more information, not trap the speaker or force him/her into a corner.
- ▶ Use the technique of linking (*probing*) to build on what the interviewee has already said.

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Key Concept 4

- ▶ It is important to prepare for special challenges that might present themselves during the interview.
- ▶ *What special challenges have you already experienced or anticipate might occur?*

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Possible Interviewing Challenges

- ▶ The very shy
- ▶ The very talkative
- ▶ Unmotivated, maybe because service is a requirement
- ▶ Attitude problem, despite skills
- ▶ Wants position, but is not qualified
- ▶ Only available for short-term work
- ▶ Interviewing only on the telephone
- ▶ Online interviewing for virtual volunteering

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Summary

- ▶ Nothing you do will impact the volunteer program more positively than effective interviewing and mutual screening.
- ▶ When the right people are in the right jobs, the role of volunteer supervisor is a pleasure!

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Suggestions for Expanded Activities for Sessions over 55 Minutes:

1. Deal in more depth with the policies and practices of turning down prospective volunteers and further discuss techniques for saying "no" to an applicant you are interviewing.
2. Spend more time on designing questions for specific volunteer assignments within your organization.
3. Allow more time to discuss problem situations that are common in interview situations with your volunteer applicants.
4. End the session with opportunities for people to role play the interview of a volunteer. If the group is very inexperienced, you might first demonstrate a brief interview with one of your workshop participants.
5. Allow more time to discuss qualities of good interviewers. There is a great deal of learning potential in this activity.
6. Do a reflective listening activity whereby you get participants into dyads and have one person talk on a designated topic (e.g., how we can improve our client services, my opinion on abortion, etc.) while the other person listens for understanding. The listeners reflect back to the speakers what they understood the speakers to be saying. The speakers give feedback to the listeners as to the accuracy of their summaries. Reverse roles. After the exercise, allow anyone to share what they learned in the experience.
7. Discuss how you will deal with entrepreneurial volunteers who desire to volunteer in new ways with the organization.
8. Discuss how you would interview a person who is representing an established *group* of volunteers responding to an episodic volunteer opportunity, such as a clean-up day.
9. Discuss what information you need to obtain from volunteers who serve in one-day volunteer positions. Use an example of a real situation in your organization.
10. Discuss how to best handle telephone or online interviews.



Suggested Resources on Interviewing Volunteers

Books

Graff, Linda L. *Beyond Police Checks: The Definitive Volunteer & Employee Screening Guidebook*. Dundas, ON: Linda Graff & Associates: 1999.
Order at <http://www.energizeinc.com/bookstore.html> .

Maddux, Robert. *Quality Interviewing, Third Edition: A Step-by-Step Action Plan for Success (The Fifty-Minute Series)*. Menlo Park, CA: Crisp Publications, 1994.

McCurley, Steve and Rick Lynch. "Matching Volunteers to Work" Chapter 6 in *Volunteer Management: Mobilizing All the Resources in the Community*, 2nd ed. Kemptonville, ON: Johnstone Training and Consultation, Inc., 2006. Order at <http://www.energizeinc.com/bookstore.html> .

Wilson, Marlene. *Interview Training Manual for Volunteer Ministry Programs*. Boulder, CO: Volunteer Management Associates: 2003. Order at <http://www.volunteermanagement.com> .

Articles

Fixler, Jill Friedman. "Group Interviewing Techniques: Hitting the Bull's Eye Every Time." *e-Volunteerism: The Electronic Journal of the Volunteer Community*, Vol. III, Issue 3, April-June 2003. <http://www.e-volunteerism.com> .

Web Sites

Strategy for Interviewing Volunteers

<http://www.nald.ca/fulltext/volnTeen/page8.htm>

Sample questions and other suggestions (keep scrolling through the pages) from Literacy Partners of Manitoba.

Volunteer Screening

<http://www.casanet.org/program-management/volunteer-manage/>

Scroll down to detailed volunteer screening section on the CASA site.

What Is Screening?

<http://www.volunteer.ca/volcan/eng/content/screening/screening.php?display=4,0>

Excellent overview of the rationale for and steps of effective volunteer screening from Volunteer Canada. Includes "Screening in Faith" PDF for faith communities.



Handout 1

The 4 Key Concepts of Interviewing Volunteers

1. The primary purposes of interviewing volunteers are to determine a mutual fit between the candidate and the organization and to screen for risks to the volunteer, the organization, and the clients if the prospective volunteer is chosen.
2. There are four Key Steps in the interviewing process: ***Preparation, Opening, the Body, and Closing.***
3. Two essential skills in interviewing are:
 - Designing and asking questions based on an analysis of the position and required qualifications..
 - Reflective listening assuring that both individuals are hearing and understanding.
4. It is important to prepare for special challenges that might present themselves during the interview.



Handout 2

Why Interview?

The purpose of the interviewing process is for the applicant and the interviewer to become mutually acquainted so that each can determine if there is a good match between their interests.

Without this significant screening step, many misplaced or inappropriate volunteers begin to work for organizations, and both the volunteer and the organization find dissatisfaction in the long run. When you have the wrong person in the volunteer job, the efforts of volunteer supervisors/leaders are often distracted by the inevitable problems of poor performance, volunteer dissatisfaction, staff/volunteer complaints, etc.

Taking the time to interview and screen volunteers enables you to determine:

1. If the volunteer has the needed skills, experience, and motivation to do the job well.
2. If the volunteer will fit into the culture of your organization.
3. If the volunteer's motivational needs can be met.
4. If your recruitment program seems to be attracting the best people for your organization and for available positions.

It is important to screen volunteers because:

1. It protects clients.
2. The agency reputation is affected by volunteers.
3. The potential impact on the morale of the staff.
4. Volunteers suffer if they are misplaced.
5. You can recognize high-risk and high-potential volunteers.



Handout 3

Key Steps in the Interview Process

Step 1: Preparation

Preparation for the interview includes:

- Reviewing all available information about the applicant. It often helps to have the applicant fill out an application ahead of time.
- Reviewing all pertinent information on the organization and volunteer positions.
- Formulating questions to bring out the desired information you need to screen for suitability for the position(s).
- Scheduling adequate time (generally one half hour) and a comfortable, private place for interviewing.
- Casting aside your other work and distractions, and asking for your calls to be held.

Step 2: Opening/Greeting

Opening the interview includes:

- Putting the applicant at ease (warm greeting, introductions, establishing rapport).
- Clarifying the purpose of the interview.
- Establishing timeframe for the interview.

Step 3: Body of the Interview

- If the interviewee is not familiar with your organization, you may wish to give some overview at the beginning of the interview. Otherwise, you may wish to begin the interview with questions that access information about the person's hobbies, interests, past jobs, motivators, dislikes, etc.

(continued)



Key Steps in the Interview Process, page 2

- If you have several applicants for the same position, be sure to ask each of them the core questions you have developed, so that you have comparative information with which to make your selection later.
- *After* getting a clear picture of the applicant (and assuming you wish to move forward), selectively share information about the possible volunteer positions for which he/she might be suitable. (If you conduct the interview in the reverse order, prospective volunteers may simply tell you what they think you want to hear in order to get an available position.)
- As you focus in on which position this applicant is likely to be suited for, give all the necessary information: position requirements, hours of service, place and conditions of work, training needed, purchase of uniform (if required), opportunities offered, supervision to be expected, etc.
- Be careful to explain the full requirements of the job; a common mistake is for interviewers to undersell the job or its requirements. You may want to offer an opportunity for the volunteer to observe the activity before committing to it.
- Take time to answer the applicant's questions.
- The prospective volunteer may offer an unexpected skill or talent, or have an idea for contributing time to the organization in a way that has not previously been considered. It is important to listen for what a volunteer might bring to the organization that might become formalized into a new volunteer position. Ultimately the proposed idea and the organization's need for that skill must be fully explored. It may involve having a second interview with the potential volunteer to fully determine mutual interests in developing a new volunteer position.

Step 4: The Closing

The closing should be concise and upbeat. First review and summarize where you have been in your interview, and then share what the next steps will be.

When the applicant is acceptable

This is easy. The important thing is to be certain that the final choice is wholeheartedly the applicant's. Have you gently urged the applicant to accept your own decision? If there is agreement, be sure the applicant knows when and where to go for discussion and determination of the specific assignment.



(continued)

Key Steps in the Interview Process, page 3

When the applicant is unacceptable

- Rejection is not easy at any time, particularly when the would-be applicant is eager to be of help. When the interviewer has reached a decision that the applicant is unqualified for the position in question or for other service in the organization, the interview should be terminated as rapidly as possible, with graciousness and tact.
- If the applicant has skills or experience which may qualify him/her for volunteer positions with other agencies in the community, make the referral and, for courtesy sake, call the recommended agency to let them know. If you have a volunteer center serving your area, you may wish to refer the prospect there to learn about the range of available volunteer positions elsewhere. You may also want to refer the volunteer to online registries of volunteer opportunities such as VolunteerMatch (<http://www.volunteermatch.org/>).
- Often an inappropriate applicant will verbalize his/her disinterest in the position, in which case you can agree that it does not sound like a “match.” But if the person seems to want the position, you must, in a carefully impersonalized discussion, show the applicant that this is unsuitable for both the individual and the organization. Subterfuges, such as invoking a waiting list or mentioning vague future dates for contact, disappoint, annoy, and can make enemies unnecessarily.

In either case...

Regardless of the outcome of the interview, in closing thank the person for his/her time and interest in your organization. It may be necessary to develop some interview termination techniques, since applicants sometimes do not know when it is time to leave. Standing up is usually an effective cue that the interview is over.



Handout 4

Critical Skills in Interviewing: QUESTIONS

Closed Questions

Closed questions can usually be answered by a simple “yes” or “no” and evoke little explanation. They are useful for obtaining specific answers, but they can prevent getting at needed information. Closed questions typically begin with such words as: is, do, has, can, will, or shall. Some examples:

Have you ever volunteered before?
Can you work in the evenings?
Will you be moving into your new house soon?
Do you type?
Do you enjoy children?
Are Wednesdays all right?

Open-Ended Questions

Open-ended questions usually require an explanation and therefore elicit much more information. They typically begin with such words as what, when, how, who, where, or which. Some examples:

Tell me more about... ?
How did you do... ?
What did you not like about... ?
What would you like to be different about... ?

When you design your interview questions, make certain that you have a number of open-ended questions such as:

Why are you interested in this position/organization?
What type of supervision do you like to receive?
How would you describe your ideal work setting?
How will this volunteer position fit into your life with other priorities?



Handout 5

Critical Skills in Interviewing: LISTENING

Listening is another critical skill for effective interviewing. It is distressing to learn that we generally only remember 50% of what was shared with us immediately after it is shared. Why is this, and what practices do we need to learn to become a good listener?

1. Listen to understand what is meant – not to get ready to reply, contradict, or refute.
2. Know that what is meant during an interview involves more than the dictionary meaning of the words that are used. It involves the tone of voice, the facial expressions, and overall behavior of the speaker.
3. Observe all of this and be careful not to interpret too quickly. Look for clues as to what the other person is trying to say. Put yourself in the speaker's shoes, see the world as the speaker sees it, accept the speaker's feelings as facts that have to be taken into account whether you share them or not.
4. Put aside your own views and opinions for the time being. Realize that you cannot listen to yourself inwardly and at the same time listen outwardly to the speaker.
5. Control impatience, knowing that listening is faster than talking. The average person speaks about 125 words a minute, but can listen to about 400 words a minute. The effective listener does not jump ahead of the speaker, but gives him/her time to tell his/her story.
6. Do not prepare to answer while listening. Wait to get the whole message before deciding what to say in turn. The last sentence of the speaker may give a new slant to what was said before.
7. Show interest and alertness. This stimulates the speaker and improves performance.
8. Do not interrupt. Ask questions in order to secure more information, not to trap the speaker or force him/her into a corner.
9. Use the technique of linking to build on what the interviewee has already said. This is called *probing* and it indicates to the interviewee that you are listening (e.g., "You indicated that your Red Cross volunteer experience was particularly pleasurable. Can you elaborate on why it was so pleasurable?").



Participant Evaluation Form

Thank you for taking the time to share your evaluation of today's seminar. Your critique is valued and will be considered as we continually strive to improve our support to all personnel who team with volunteers.

1. Check the appropriate box to indicate whether you **met**, **partially met**, or **did not meet** the following learning objectives for this workshop:
 - a. Discuss the purposes of interviewing prospective volunteers.
 met *partially met* *did not meet*
 - b. Review the four key steps in interviewing.
 met *partially met* *did not meet*
 - c. Design relevant interview questions and review the essential role of listening during the interview process.
 met *partially met* *did not meet*
 - d. Propose options for handling problem situations that occur during interviews
 met *partially met* *did not meet*

Comments:

2. This session was:

- | | | |
|--------------|------------------------------|-----------------------------|
| Helpful: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Provocative: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Practical: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Well-paced: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too short: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too long: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |

Comments:



Training Busy Staff to Succeed with Volunteers:
The 55-Minute Training Series – Evaluation Form

Participant Evaluation Form (continued)

3. This trainer was:

- Knowledgeable: YES NO
Prepared: YES NO
Organized: YES NO
Enthusiastic: YES NO
Good discussion facilitator: YES NO

Comments:

4. In what ways can you utilize this material in your work?

5. What, if anything, do you plan to do differently as a result of this training?

6. What additional information on this or any other topic dealing with volunteers would be helpful to you in your work?

7. What suggestions do you have to strengthen this workshop?

8. Further comments or suggestions:

NAME (optional) _____

Training Busy Staff to Succeed with Volunteers: *The 55-Minute Training Series*

PowerPoint® Slides

*To open the attached PowerPoint slides,
double-click the thumbtack icon below.*



Trainer's Guide for Presenting...

Volunteer Motivation

Betty Stallings

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Volunteer Motivation

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Trainer's Guide for Presenting the *Volunteer Motivation* Module

Introduction to Volunteer Motivation

We are frequently caught up in the faulty thinking: "How can I motivate my volunteers?" Our frustration continues until we realize or remember that motivation comes from within. We can't motivate people; we can only provide situations which help others motivate themselves. As John Gardner, founder of Common Cause, has said, "Leaders don't create motivation, they unlock it." Perhaps the greatest change in approach to volunteer recruitment and retention is understanding a basic principle of marketing: the significance of the exchange of values. The organization has needs to be met by volunteers but success will only occur if, simultaneously, the motivational needs of volunteers are met.

At the heart of successful volunteer motivation is taking the time to discover what needs a person wants to meet while volunteering within your organization. These needs vary from individual to individual and they may change in time. Therefore, successful recruitment and retention involves ongoing monitoring of what volunteers need to attract them to your organization and what they need to keep coming back. Too often, in our pressure to "fill slots" to carry out the work of our organization, we neglect to discover what exchanges are necessary to keep volunteers content as they contribute time to assist in carrying out our organization's mission. Understanding motivation is critical for all managers of people. But for those entrusted with the supervision of volunteers, it is the essential skill.

Many people who work with volunteers hold outdated perceptions of who volunteers are, what they need, and their range of talents and diversity. It is important for organizations to keep abreast of the changing profile of today's volunteers so that positions are designed with an understanding of these trends. Staff who work with volunteers need to understand and honor motivational differences among volunteers by responding with effective and meaningful placement, supervision, training, and recognition. Having the philosophy that all volunteers are treated the same can miss the benefits of every volunteer's unique contributions and style.

Learning Objectives

The **primary purposes** of this module are to:

- Understand why people volunteer.
- Respect and respond to differences in motivational needs.



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Upon completion of this module, the participant will be able to:

1. Underscore that success in volunteer programs involves matching an organization's needs with a volunteer's ability and motivation.
2. Explain the variety of reasons that people volunteer today.
3. Determine their own personal motivation style and its impact on volunteer placement, supervision, and recognition preferences.
4. Examine motivation theory in light of the organization's ability to attract and retain volunteers

General Notes to Trainer

1. This workshop is in a suggested format. Feel free, however, to personalize it with your own stories. Also, phrase questions and activities in a manner most attuned to your organization.
2. Depending on the experience and sophistication of the organization in utilizing volunteers, introducing the concept of exchange of values between the organization and the volunteer may be a new concept. If volunteering is perceived as "individuals filling "x, y, z assignments," you may wish to spend more time processing participants' own personal experiences with volunteering (e.g., how they responded when their needs were not met).
3. If the organization is very comfortable regarding the perspective that volunteering is an exchange, most of the workshop can be devoted to your organization's practical use of the McClelland theory of motivation.
4. As suggested in the module narrative, it is strongly encouraged that you do some additional reading on the McClelland theory so that you have a high comfort level in presenting it succinctly and with impact.
5. The McClelland theory comes alive for people with examples – the more humorous and personal, the more memorable. Some of the best examples to use to illustrate different motivational styles is how people run meetings, talk on the telephone, and compose e-mails
6. Emphasize that the McClelland tool is simply a quick way to emphasize a point effectively. (People are motivated differently – "viva la difference!") It's easy to get caught up wondering about a right or wrong style. This can happen if the presentation pokes too much fun at a certain style without a balance of emphasis on the strengths and challenges of each.
7. Motivation is an enormous topic. This 55-minute introduction can only touch the surface of this key feature of good volunteer management.



Presentation Overview

SLIDES/ HANDOUTS	SECTION	METHOD OF PRESENTATION	TIME
S-1 to 4	Introduction Icebreaker Learning Objectives 4 Key Concepts	Activity/Presentation	7 minutes
H-1			
S-5 to 7	Key Concept 1 Meeting organization and volunteer needs	Presentation/Activity	8 minutes
H-2			
S-8 to 10	Concept 2 Why people volunteer today	Facilitated Discussion	7 minutes
H-3			
S-11 to 21	Concept 3 Understanding motivational styles	Interactive presentation/Activity	25 minutes
H-4, H-5, H-6, H-7			
S-22 to 23	Concept 4 Changing motivational needs	Presentation	6 minutes
S-24	Summary/Wrap-up/ Evaluation	Closing comments	2 minutes
H-7			Total: 55 Minutes



Presentation Script

SLIDE/ HANDOUT	SECTION	TIME
S-1: Introductory Exercise	<p style="text-align: center;">Introductory Icebreaker</p> <p>Ask participants to recall their motivation for volunteering in a certain role for a specific organization, and recall if and how the organization recognized and appreciated <i>their</i> motivational need(s).</p> <p>Example: "I volunteered to do some graphic art work for an organization. My motivation was to build my portfolio and meet new people in the community. The organization met my needs by giving me interesting projects that would demonstrate my creative talents and they printed it professionally so my work looked great. I met lots of community people and the organization credited my work on their brochure. I felt that they truly recognized and honored my motivations. And I produced an award-winning brochure for them!"</p> <p>Ask a few participants to share their experiences. It is best if you can have a mix of those who found that the organization did and did not honor their motivation.</p> <p>In debriefing, either have the group point out what was learned about the importance of honoring volunteer motivation, or suggest several themes such as:</p>	7 minutes ▼
S-2: Initial Observations about Motivation	<ul style="list-style-type: none"> • People are motivated to volunteer by a great variety of reasons. • What someone loves to do is someone else's nightmare. • Many organizations never ask why a person is volunteering; they are only interested in filling their own organizational needs. • As long as your motivational needs are cared for, you will most likely continue to volunteer. • Other <p>This activity should lead nicely into Concept 1, which will reinforce what participants have most likely experienced.</p>	
S-3: Learning Objectives S-4: Key Concepts H-1: Key Concepts	Share Learning Objectives and 4 Key Concepts	



Training Busy Staff to Succeed with Volunteers:
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SLIDE/ HANDOUT	SECTION	TIME
S-5: Key Concept 1	<p align="center">Key Concept 1</p> <p>Success in volunteer programs occurs when the needs of the organization, the paid staff, and volunteers are simultaneously met.</p> <hr/> <p>Presentation: Too often in the past we have thought of volunteering as a one-way activity. Volunteers simply give, expecting nothing in return for their contribution of time. What we now know is that there have always been exchanges going on. But we didn't always pay attention to their significance, or we responded generically with "volunteers always gain more than they give." The real truth is that both agencies and volunteers must be gaining simultaneously to make it work.</p>	8 minutes ▼
S-6: Motivation Activity H-2: Volunteer/ Organization Motivation Activity	<p>Activity to reinforce concept: Assign small groups (or facilitate entire group) to brainstorm possible impacts to the organization and the volunteer from each of the following scenarios:</p> <p>Scenario 1: The volunteer's needs are met but the agency's needs are not.</p> <p>Scenario 2: The agency's needs are met but the volunteer's needs are not.</p> <p>Debrief on Scenario 1: Staff will see volunteering as an extra burden – someone else to "fix" or deal with – and they may show resistance to further utilization of volunteers.</p> <p>Debrief on Scenario 2: Primarily volunteers will leave to get their needs met through other activities, or they might stay and become martyrs within the organization, letting others know how abused they are!!</p>	
S-7: Jigsaw Puzzle	<p>Optional activity for further reinforcement of concept: Another way to illustrate this point is to use the metaphor of a jigsaw puzzle and discuss what can happen to volunteers and organizations when the wrong person (puzzle piece) is placed in the organization (puzzle).</p>	



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SLIDE/ HANDOUT	SECTION	TIME
<i>(continued)</i> S-7: Jigsaw Puzzle	First, ask what happens to the puzzle piece when it is in the wrong spot (pops out, frayed edges, etc.); second, ask what happens to people in the wrong job. You may wish to have participants discuss how this has happened or is happening to them as volunteers, or how they have observed this occurring at their organization.	▲ (same 8 minutes)
S-8: Key Concept2	Key Concept 2 Many motivational issues/problems are rooted in an organization's need to update their understanding of who volunteers and why they contribute their time.	7 minutes ▼
S-9 to 10: Changing Volunteer Motivation	<p>Activity Ask group to suggest the differences between volunteering in the past and volunteering now, particularly as it relates to WHY people are volunteering. Responses should reflect the increased diversity of individuals and the different motivations for volunteering.</p> <p>Most volunteers today wish to "make a difference" but they are also motivated by self-interest needs – training, educational requirements, business contacts, working off court offenses, socializing and recreation, leadership opportunities, etc.</p> <p>Volunteers today tend to desire short-term activities, need flexibility, respond to causes more than organizations, like group or family experiences, and offer many professional skills. Many prefer virtual volunteer opportunities (working at their computers, away from the organization).</p>	
H-3: Why Do People Volunteer?	<p>Optional discussion topic A major question to consider is whether your organization is tapping into the motivators of today's volunteers or whether you are still focusing primarily on the needs of the organization. (You may share Handout 3 as a stimulus to discover what might be motivators for their (your) volunteers.)</p>	
S-11: Key Concept 3	Key Concept 3 Understanding and appreciating a variety of motivational styles can lead to more effective and meaningful volunteer placement, supervision, and recognition.	25 minutes ▼



Training Busy Staff to Succeed with Volunteers:
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SLIDE/ HANDOUT	SECTION	TIME
S-12: Motivational Theory	<p>Presentation: The quickest way to have participants appreciate the connection between understanding motivators and effective volunteer placement/retention is to have them examine their own motivational style. Use an instrument based on a motivational theory by David McClelland and John Atkinson (Handout 4).</p>	<p style="text-align: center;">▲ (same 25 minutes)</p>
H-4 a & b: Motivational Analysis	<p><u>Instructions for participants filling out form:</u> Have participants choose one of the three motivators in each of the 11 series of statements. It is important that the statements selected be a reflection of their work in this organization, not in any other setting. Have participants score their own sheet, noting how many achievement, affiliation, and influence/power preferences they choose. Have participants set the instrument aside while you give them some theoretical background.</p> <p>Presentation of theory: McClelland's premise on motivational theory is that what people think about reflects their key motivators. (If you are unfamiliar with this theory, I would highly recommend that you do some of the background reading suggested in the bibliography in this module.) The theory is based on the premise that:</p> <ul style="list-style-type: none"> • There are three primary motivators of human behavior: achievement, affiliation, power/influence. • We all have a combination of the three but frequently one is dominant. No style is better than the other, simply different. • Our dominant motivators may change over our lifetime. • We can exhibit one style in one setting (e.g., home) and another in a different setting (e.g., work). <p>Present information that describes characteristics of people in each style. Suggest that participants think about their own motivational style as it relates to this information. Also ask them to think about the significance it has for placing volunteers in the right job and for supervising and recognizing them appropriately.</p> <p>(This section will be greatly enhanced if you add personal illustrations and stories. If presented humorously, more people seem to relate to and remember the material.)</p>	



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The 55-Minute Training Series

SLIDE/ HANDOUT	SECTION	TIME
<p>H-5: Achievement as Prime Motivator S-13 to 14: Achievers</p>	<p>ACHIEVERS think about:</p> <ul style="list-style-type: none"> • Goals and how to achieve them • Problems and how to solve them • Strong performance and success <p>Strengths:</p> <ul style="list-style-type: none"> • Well-organized • Innovative • Good planners and problem solvers • Strong initiative <p>Struggles and Weaknesses:</p> <ul style="list-style-type: none"> • Delegating to others • Process (they can be impatient) • Valuing relationships and team • Sensitivity to feelings/needs of others • Perfectionism • Risk taking (only calculated risks) <p>Needs:</p> <ul style="list-style-type: none"> • Feedback (they don't like to fail) • Challenges and opportunity to grow • High standards, unique accomplishments • Deadlines and responsibility • Check lists (and crossing them off!) <p>Best Types of Roles:</p> <ul style="list-style-type: none"> • Fundraising • Administration • Training • Financial • Data Gathering • Professional tasks, e.g., legal, etc. • Board of Directors <p>Has:</p> <ul style="list-style-type: none"> • An elaborate PalmPilot!!! 	<p style="text-align: center;">▲</p> <p>(same 25 minutes)</p>



Training Busy Staff to Succeed with Volunteers:
The 55-Minute Training Series

SLIDE/ HANDOUT	SECTION	TIME
<p>H-6: Affiliation as Prime Motivator S-15 to16: Affiliators</p>	<p>AFFILIATORS think about:</p> <ul style="list-style-type: none"> • Interpersonal relationships • Feelings (theirs and others) • How they can help <p>Strengths:</p> <ul style="list-style-type: none"> • Good barometers of "climate" • Team players • Sensitivity • Good listeners • Good persuaders <p>Struggles and Weaknesses:</p> <ul style="list-style-type: none"> • Over-sensitivity • Handling conflict • Unaware of time • Needing much reassurance and affirmation • Overreacting • Being alone or with many strangers <p>Needs:</p> <ul style="list-style-type: none"> • Need to feel needed; to help • Be with friendly people • To feel included • To be supervised by a leader-friend • Personal recognition • To be liked • To express feelings <p>Best Types of Roles:</p> <ul style="list-style-type: none"> • Direct client services • Public relations • Support activities • Planning/giving recognition to others • Leading support groups <p>Has:</p> <ul style="list-style-type: none"> • Biggest Address File!!! 	<p style="text-align: center;">▲</p> <p>(same 25 minutes)</p>



Training Busy Staff to Succeed with Volunteers:
The 55-Minute Training Series

SLIDE/ HANDOUT	SECTION	TIME
<p>H-7: Power/Influence as a Prime Motivator S-17 to 18: Power/Influence</p>	<p>POWER/INFLUENCE people think about: Impact, influence on behalf of others (social power) What's in it for me? Keeping the power I have (personal power) Leadership, prestige, and job status (both kinds of power)</p> <p>Strengths:</p> <ul style="list-style-type: none"> • Door openers • Strategic thinkers • Fundraising from individuals • Teachers, trainers, speakers • Working through hierarchy <p>Struggles and Weaknesses:</p> <ul style="list-style-type: none"> • Dominating • Argumentative, outspoken • Intimidating (especially to Affiliators) <p>Needs:</p> <ul style="list-style-type: none"> • Position of leadership/influence • Public recognition • Prestige and job status <p>Best Types of Roles:</p> <ul style="list-style-type: none"> • Advocacy • Policy making • Fundraising • Political action • Speaker, trainer • Media representative • Board Chair or chair of powerful committee <p>Has:</p> <ul style="list-style-type: none"> • Impressive Recognition Plaque Wall!!! 	<p style="text-align: center;">▲</p> <p>(same 25 minutes)</p>
<p>S-19: Activity</p>	<p>Activity (optional, if time available) Have participants get into groups of like-motivated individuals and have them discuss among themselves and then share with others in the full group:</p> <ol style="list-style-type: none"> 1. Their needs 2. Their favorite jobs 3. Their preferred work atmosphere 4. How they like to be supervised 5. How they like to be recognized 	



Training Busy Staff to Succeed with Volunteers:
The 55-Minute Training Series

SLIDE/ HANDOUT	SECTION	TIME
S-20 : Points to Remember	<p>Summary points:</p> <ol style="list-style-type: none"> 1. Organizations need people with a variety of motivational styles to achieve their mission. 2. The key is to understand what motivates a person to volunteer with your organization and, if possible and appropriate, honor those motivations in exchange for the volunteer serving the organization. 3. Some conflicts arise between those with differing motivational styles. It is helpful to openly recognize and appreciate the differences rather than using them as a source of conflict. 4. Organizations must get creative in thinking through the challenges of meeting the variety of needs and styles of volunteers. <p>You may wish to have workshop participants identify situations when it is important to incorporate different styles in their organizations and discuss how to better meet all needs. One example might occur during meetings, where people with all three motivational styles are represented. Suggestions might include:</p> <ul style="list-style-type: none"> • Allow for social time before the meeting. • Start the meetings on time and efficiently take care of the business at hand. • Assign appropriate work to people in which their motivational needs are met. 	<p style="text-align: center;">▲</p> <p style="text-align: center;">(same 25 minutes)</p>
S-21: Determining Motivation	<ol style="list-style-type: none"> 5. To help determine what motivation people might have, examine their response to non-directive questioning such as: <ul style="list-style-type: none"> • What jobs have you enjoyed most? least? • Describe a perfect supervisor. Remember: Affiliators want a buddy; Achievers want a partner to offer parameters and checkpoints; and Power People want to know the goal and be given a great deal of freedom in reaching it. 	
S-22: Key Concept 4	<p>Key Concept 4</p> <p>Retention of volunteers is enhanced by recognizing their changing motivational needs.</p>	<p style="text-align: center;">6 minutes</p> <p style="text-align: center;">▼</p>



Training Busy Staff to Succeed with Volunteers:
The 55-Minute Training Series

SLIDE/ HANDOUT	SECTION	TIME
<p>S-23: Changing Motivational Needs</p>	<p>Presentation: It is important to note that motivational needs change over time; to be successful in retaining volunteers, we must be aware when those needs have changed.</p> <p>It is also important to remember the Maslow Motivation Theory which stresses that met needs no longer motivate; we must stay in touch with the volunteer to notice when the original needs are met or have changed. When we suspect this is happening, here's a powerful question to ask volunteers:</p> <p>"What can we do, as an organization (or as individuals), to keep you involved in our organization? You are very important to us and I sense that your interest is waning."</p> <p>(An example would be a volunteer who was motivated to do the work because of his/her children's involvement in the activity. Now that his/her children are no longer in the program, what might be substitute motivators to keep this volunteer interested in volunteering with you?)</p>	<p>▲ (same 6 minutes)</p>
<p>S-24: Summary H-8: Evaluation</p>	<p>Summary/Wrap-up/Evaluation Remember: It is not difficult to encourage people to do what they long to do. The challenge is to find out what that longing is. Motivation is truly at the heart of successful volunteer leadership.</p> <p>Distribute Participant Evaluation forms.</p> <p>End 55-Minute Training.</p>	<p>2 minutes ▼</p>



“Thumbnail” View of Slides

Training Busy Staff
to Succeed with Volunteers:
The 55-Minute Training Series

Volunteer Motivation

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Introductory Exercise

- ▶ Recall your motivation for volunteering in a certain role for a specific organization.
- ▶ Did (or does) the organization recognize and appreciate your motivational need(s)?
- ▶ How?

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Initial Observations

- ▶ People are motivated to volunteer by a great variety of reasons.
- ▶ What someone loves to do is what someone else would prefer not doing.
- ▶ Many organizations never ask why a person is volunteering.
- ▶ As long as your motivational needs are cared for, you will most likely continue to volunteer.

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Learning Objectives

- ▶ Underscore that success in volunteer programs involves matching an organization's needs with a volunteer's ability and motivation.
- ▶ Explain the variety of reasons that people volunteer.
- ▶ Determine your personal motivation style and its impact on volunteer placement, supervision and recognition preferences.
- ▶ Examine motivation theory in light of the organization's ability to attract and retain volunteers.

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4 Key Concepts

1. Success in volunteer programs occurs when the needs of the organization, the paid staff, and volunteers are simultaneously met.
2. Many organizations need to update their understanding of who volunteers and why they contribute their time.
3. Appreciating different motivational styles can lead to more effective volunteer placement, supervision, and recognition.
4. Retention of volunteers is enhanced by recognizing their changing motivational needs.

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Key Concept 1

- ▶ Success in volunteer programs occurs when the needs of the organization, the paid staff, and volunteers simultaneously met.

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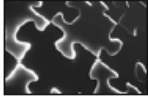
Activity

- ▶ What are some impacts of the following:
 - *Scenario 1:* The volunteer's needs are getting met but the agency's needs are not.
 - *Scenario 2:* The agency's needs are getting met but the volunteer's needs are not.

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Jigsaw Puzzle Metaphor

- ▶ What happens if the wrong puzzle piece is inserted?
- ▶ The same thing is true when a volunteer is assigned to the wrong position.



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Key Concept 2

- ▶ Many motivational issues/problems are rooted in an organization's need to update their understanding of who volunteers and why they contribute their time.

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Changing Volunteer Motivation

- ▶ What's different between why people may have volunteered in the past and why they do so now?
- ▶ Expanding motivations:
 - To make a difference + self-interest
 - Training or educational requirements
 - Business contacts
 - Socializing and recreation
 - Leadership opportunities and more...

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Changing Volunteer Motivation

- ▶ Changing Needs:
 - Flexibility
 - Prefer short-term assignments
 - Want family and group activities
 - Respond to causes
 - May be "voluntolds"
 - Prefer virtual volunteer work

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Key Concept 3

- ▶ Understanding and appreciating a variety of motivational styles can lead to more effective and meaningful volunteer placement, supervision, and recognition.

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“Thumbnail” View of Slides (continued)

Motivational Theory

- ▶ David McClelland and John Atkinson
- ▶ The McClelland Theory is based on the premise that there are three primary motivators of human behavior:
 - Achievement
 - Affiliation
 - Power/Influence

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Achievers...

- ▶ Think about:
 - Achieving goals
 - Solving problems
 - Strong performance and success
- ▶ Strengths:
 - Well-organized
 - Innovative
 - Good planners, and problem solvers
 - Strong initiative
- ▶ Struggles and Weaknesses:
 - Delegation to others
 - Process (they can be impatient)
 - Valuing relationships and team
 - Sensitivity to feelings/needs of others
 - Perfectionism
 - Calculated risk taking

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Achievers...

- ▶ Needs:
 - Feedback (they don't like to fail)
 - Challenges and opportunity to grow
 - High standards, unique accomplishments
 - Deadlines
 - Responsibility
 - Checklists (and crossing them off!)
- ▶ Best Types of Roles:
 - Fundraising
 - Administration
 - Training
 - Financial
 - Data gathering
 - Professional tasks
 - Board of Directors

▶ Has: An Elaborate Palm Pilot!

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Affiliators...

- ▶ Think about:
 - Interpersonal relationships
 - Feelings (theirs and others)
 - How they can help
- ▶ Strengths:
 - Good barometer of "climate"
 - Team players
 - Sensitivity
 - Good listeners
 - Persuaders
- ▶ Struggles and Weaknesses:
 - Over-sensitive
 - Dealing with conflict
 - Unaware of time
 - Need much affirmation
 - Can over-react
 - Being alone or with strangers

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Affiliators...

- ▶ Needs:
 - To help and be needed
 - To be with friendly people
 - To feel included, liked
 - To be supervised by a "leader-friend"
 - Personal recognition
 - Opportunities to express feelings
- ▶ Best Types of Roles:
 - Direct client services
 - Public relations
 - Support activities
 - Planning/giving recognition to others
 - Leading support groups

▶ Has: Biggest address file!

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Power/Influence People...

- ▶ Think about:
 - Impact, influence on behalf of others (social power)
 - What's in it for me? Keeping the power I have (personal power)
 - Leadership, prestige and job status (social and personal power)
- ▶ Strengths:
 - Door openers
- ▶ Struggles and Weaknesses:
 - Strategic thinkers
 - Fundraising from individuals
 - Teachers, trainers
 - Work through hierarchy
 - Dominating
 - Argumentative and outspoken
 - Possibly intimidating to Affiliators

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Power/Influence

- ▶ Needs:
 - Position of leadership and influence
 - Public recognition
 - Prestige and job status
- ▶ Best Types of Roles:
 - Advocacy
 - Policymaking
 - Fundraising
 - Political action
 - Speaker, trainer
 - Media representative
 - Board Chair or chair of powerful task force or committee

▶ Has: Impressive Recognition Plaque Wall!

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Activity

- ▶ Find like-motivated colleagues and discuss:
 1. Your needs.
 2. Your favorite jobs.
 3. Your preferred work atmosphere.
 4. How you like to be supervised.
 5. How you like to be recognized.

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Points to Remember

- ▶ Organizations need people with a variety of motivational styles to achieve their mission.
- ▶ Honor what motivates a person to volunteer in exchange for that person's service to the organization.
- ▶ Some conflict can arise between people with different motivational styles - recognize and appreciate that.

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Determining Motivation

- ▶ To determine motivational style, ask non-directive questions such as:
 - What jobs have you enjoyed most? least?
 - Describe a perfect supervisor.
 - » Affiliators want a buddy.
 - » Achievers want a partner to offer parameters and checkpoints.
 - » Power People want to know the goal and be given a great deal of freedom in reaching it.

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Key Concept 4

- ▶ Retention of volunteers is enhanced by recognizing their changing motivational needs.

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Changing Motivational Needs

- ▶ Motivational needs change over time.
- ▶ We must be aware when needs change.
- ▶ The Maslow Theory reminds us that *met needs no longer motivate*.
- ▶ Powerful question to ask:
 - What can we do, as an organization (or as individuals), to keep you involved as a volunteer in our organization?

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“Thumbnail” View of Slides (continued)

Summary

- ▶ It is not difficult to encourage people to do what they long to do.
- ▶ The challenge is to find out what that longing is.
- ▶ Motivation is truly at the heart of successful volunteer leadership.

S24

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Suggestions for Expanded Activities for Sessions over 55 Minutes:

1. Key Concept 1 could be expanded to look at ways your organization could be more adept in making certain that volunteer motivators are considered when placing volunteers into the right assignments. A workshop on interviewing would be a valuable follow-up after this module. People could begin to design appropriate questions to elicit the information necessary to make good matches.
2. This module can be a stand-alone training or part of a longer seminar on supervising today's volunteers.
3. Using good adult learning principles, incorporate activities where participants examine their own motivational experiences being volunteers or their experience as supervisors of volunteers.
4. Due to time pressures, you may need to present the differences between the volunteers of the past and those of the present; ask how the organization must better respond to these differences (Key Concept 2).
5. Key Concept 3 can obviously take considerably longer than the 25 minutes allocated in this module. Most participants find this a fun and enlightening section which opens up understanding of people's differences. Since the atmosphere should be upbeat, people tend to experience more tolerance and appreciation of others who have a different motivational focus.
6. One way to have more interpretive time for Key Concept 3 is to type out instructions and have participants fill out and score the questionnaire before attending the session. Remember that people should think of themselves in your organization's setting and should respond truthfully, not as they would like to be.



Suggested Resources on Motivation of Volunteers

Books

McCurley, Steve and Rick Lynch. *Keeping Volunteers*. Olympia, WA: Fat Cat Publications, 2005.
Order at <http://www.energizeinc.com/bookstore.html> .

McCurley, Steve and Rick Lynch. *Volunteer Management: Mobilizing all the Resources of the Community*, revised ed. Kemptville, ON: Johnstone Training and Consultation, Inc., 2006. Order at <http://www.energizeinc.com/bookstore.html> and <http://www.bettystallings.com/> .

Wilson, Marlene. *The Effective Management of Volunteer Programs*. Boulder, CO: Volunteer Management Associates, 1976. (A classic in the field with an excellent chapter 3, "The Whys of Behavior," which shares the McClelland Theory of Motivation in detail.) Order at <http://www.volunteermanagement.com/> .

Articles

Lynch, Rick. "Volunteer Retention and Feelings of Connection." *e-Volunteerism: The Electronic Journal of the Volunteer Community*, Vol. 1, Issue 1, Fall 2000. <http://www.e-volunteerism.com> .

Merrill, Mary. "Understanding Volunteer Motivations." Monthly essay on Merrill Associates Web site, December 2002. <http://www.merrillassociates.net/topic/2002/12/understanding-volunteer-motivations/> .

Video

Justis, Jane. *Motivation: The Key to Matching Right People to Right Jobs*. 1997.
Order at <http://www.volunteermanagement.com/> .



Handout 1

The 4 Key Concepts of Volunteer Motivation

1. Success in volunteer programs occurs with when the needs of the organization, the paid staff, and volunteers are simultaneously met.
2. Many motivational issues/problems are rooted in an organization's need to update their understanding of who volunteers and why they contribute their time.
3. Understanding and appreciating a variety of motivational styles can lead to more effective and meaningful volunteer placement, supervision, and recognition.
4. Retention of volunteers is enhanced by recognizing their changing motivational needs.



Handout 2

Volunteer/Organization Motivation Activity

In small groups, discuss the *implications* of the following scenarios:

1. **A volunteer in an organization is getting his/her needs met but the needs of the organization are not being met.** Example: A volunteer has great affiliation needs and gets them met by talking with staff most of the time s/he is at the organization doing volunteer work.

2. **A volunteer in the organization is working hard to meet the needs of the organization but her/his needs are not being met.** Example: A volunteer is asked to do trivial tasks even though s/he has requested and is qualified to be more involved providing leadership activities.



Handout 3

Why Do People Volunteer?

Understanding a person's motivation for volunteering is key to placing him/her in the right volunteer position. Listed below is a sampling of some of the needs that people can meet through volunteer activity:

- Be challenged
- Develop new skills and interests
- Earn credit for school
- Improve community
- Impact a cause you care about
- Gain leadership skills
- Make a difference
- Continue to use skills after retiring
- Add variety and spice to life
- Socialize
- Give back to the community/agency
- National Community Service
- Gain experience for a career change
- Meet new people
- Network and PR for business
- Get acquainted with a community
- Escape from life stresses
- Receive recognition
- Have fun
- Donate professional skills
- Gain self-esteem and self-confidence
- Maintain skills while out of job market
- Work off court fines
- Improvement in mental or physical health



Handout 4a

Motivational Analysis

Each of the following groups of statements has three choices. Choose the one in each set which most closely fits your own motivations. Remember, there are no wrong answers. Place an “X” before the letter of your choice.

1. _____ a. When doing a job, I seek feedback.
 _____ b. I prefer to work alone and am eager to be my own boss.
 _____ c. I seem to be uncomfortable when forced to work alone.

2. _____ a. I go out of my way to make friends with new people.
 _____ b. I enjoy a good argument.
 _____ c. After starting a task, I am not comfortable until it is completed.

3. _____ a. Status symbols are important to me.
 _____ b. I am always getting involved in group projects.
 _____ c. I work better when there is a deadline.

4. _____ a. I work best when there is some challenge involved.
 _____ b. I would rather give orders than take them.
 _____ c. I am sensitive to others - especially when they are mad.

5. _____ a. I am eager to be my own boss.
 _____ b. I accept responsibility eagerly.
 _____ c. I try to get personally involved with my superiors.

6. _____ a. I am uncomfortable when forced to work alone.
 _____ b. I prefer being my own boss, even when others feel a joint effort is required.
 _____ c. When given responsibility, I set measurable standards of high performance.

7. _____ a. I am very concerned about my reputation or position.
 _____ b. I have a desire to out-perform others.
 _____ c. I am concerned with being liked and accepted.

8. _____ a. I enjoy and seek warm, friendly relationships.
 _____ b. I attempt complete involvement in a project.
 _____ c. I want my ideas to predominate.

9. _____ a. I desire unique accomplishments
 _____ b. It concerns me when I am being separated from others.
 _____ c. I have a need and desire to influence others.

10. _____ a. I think about consoling and helping others.
 _____ b. I am verbally fluent.
 _____ c. I am restless and innovative.

11. _____ a. I set goals and think about how to attain them.
 _____ b. I think about ways to change people.
 _____ c. I think a lot about my feelings and the feelings of others.

Source Unknown



Handout 4b

Motivational Analysis Key

- | | | | | | |
|----|----|-------------|-----|----|-------------|
| 1. | a. | Achievement | 7. | a. | Influence |
| | b. | Influence | | b. | Achievement |
| | c. | Affiliation | | c. | Affiliation |
| 2. | a. | Affiliation | 8. | a. | Affiliation |
| | b. | Influence | | b. | Achievement |
| | c. | Achievement | | c. | Influence |
| 3. | a. | Influence | 9. | a. | Achievement |
| | b. | Affiliation | | b. | Affiliation |
| | c. | Achievement | | c. | Influence |
| 4. | a. | Achievement | 10. | a. | Affiliation |
| | b. | Influence | | b. | Influence |
| | c. | Affiliation | | c. | Achievement |
| 5. | a. | Influence | 11. | a. | Achievement |
| | b. | Achievement | | b. | Influence |
| | c. | Affiliation | | c. | Affiliation |
| 6. | a. | Affiliation | | | |
| | b. | Influence | | | |
| | c. | Achievement | | | |

of Achievement _____ # of Influence _____ # of Affiliation _____



Handout 5

Qualities of People with Achievement as a Prime Motivator

(Based on Motivation Theory by John Atkinson and David McClelland)

Think about:

- Goals and how to achieve them
- Problems and how to solve them
- Strong performance and success

Strengths:

- Well organized
- Innovative
- Good planner and problem-solver
- Strong initiative

Struggles and Weaknesses:

- Delegation to others
- Process (they can be impatient)
- Valuing relationships and team
- Perfectionism
- Sensitivity
- Risk-Taking (only calculated)

Needs:

- Feedback (they don't like to fail)
- Challenge and opportunity to grow
- High standards, unique accomplishments
- Deadlines
- Responsibility
- Checklists (and crossing them off!)

Best Types of Jobs:

- Fundraising
- Training
- Data gathering
- Board of Directors
- Administration
- Financial
- Professional Tasks

Has: An Elaborate PalmPilot



Handout 6

Qualities of People with Affiliation as a Prime Motivator

(Based on Motivation Theory by John Atkinson and David McClelland)

Think About:

- Interpersonal relationships
- Feelings (theirs and others)
- How they can help

Strengths:

- Good barometers of "climate"
- Team players
- Sensitivity
- Good listeners

Struggles and Weaknesses:

- Over-sensitive
- Unaware of time
- Dealing with conflict
- Needing much affirmation
- Being alone or with strangers

Needs:

- To help and be needed
- To be with friendly people
- To feel included, liked
- To be supervised by a "leader-friend"
- Personal recognition
- Opportunities to express feelings

Best Type of Jobs:

- Direct client services
- Group or family activities
- Planning / giving recognition
- Public Relations
- Leading support groups

Has: Biggest Address File



Handout 7

Qualities of People with Power/Influence as a Prime Motivator

(Based on Motivation Theory by John Atkinson and David McClelland)

Think about:

Impact, influence on behalf of others (Social Power)
What's in it for me? Keeping the power I have (Personal Power)
Leadership, prestige, and job status (both kinds of power)

Strengths:

Door openers
Strategic thinkers
Fundraising from individuals
Teachers, trainers
Work through hierarchy

Struggles and Weaknesses:

Dominating
Argumentative
Outspoken
Intimidating (especially to Affiliators)

Needs:

Position of leadership and influence
Public recognition
Prestige and job status

Best Types of Jobs:

Advocacy
Policy making
Fundraising
Political Action
Speaker, trainer
Media Representative
Board Chair or Chair of powerful task force or committee

Has: Impressive Recognition Plaque Wall



Participant Evaluation Form

Thank you for taking the time to share your evaluation of today's seminar. Your critique is valued and will be considered as we continually strive to improve our support to all personnel who team with volunteers.

1. Check the appropriate box to indicate whether you **met**, **partially met**, or **did not meet** the following learning objectives for this workshop:
 - a. Explain the ongoing formula for success in volunteer programs: matching an organization's needs with a volunteer.
 met *partially met* *did not meet*
 - b. Discuss the variety of reasons that people volunteer today.
 met *partially met* *did not meet*
 - c. Determine their personal motivation style and its impact on job placement, supervision, and recognition preferences.
 met *partially met* *did not meet*
 - d. Appraise motivation theory in light of their organization's ability to attract and retain volunteers.
 met *partially met* *did not meet*

Comments:

2. This session was:

- | | | |
|--------------|------------------------------|-----------------------------|
| Helpful: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Provocative: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Practical: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Well-paced: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too short: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too long: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |

Comments:



Training Busy Staff to Succeed with Volunteers *The 55-Minute Training Series- Evaluation Form*

Participant Evaluation Form (continued)

3. This trainer was:

- Knowledgeable: YES NO
Prepared: YES NO
Organized: YES NO
Enthusiastic: YES NO
Good discussion facilitator: YES NO

Comments:

4. In what ways can you utilize this material in your work?

5. What, if anything, do you plan to do differently as a result of this training?

6. What additional information on this or any other topic dealing with volunteers would be helpful to you in your work?

7. What suggestions do you have to strengthen this workshop?

8. Further comments or suggestions:

NAME (optional) _____

H-8(b)

Training Busy Staff to Succeed with Volunteers: *The 55-Minute Training Series*

PowerPoint® Slides

*To open the attached PowerPoint slides,
double-click the thumbtack icon below.*



Trainer's Guide for Presenting... *Supervising Volunteers*

Betty Stallings

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Supervising Volunteers

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Trainer's Guide for Presenting the *Supervising Volunteers* Module

Introduction to Supervising Volunteers

The goal of supervising volunteers is to establish conditions that encourage and support others to get the work done. Formerly, in the traditional supervisor/worker model, the supervisor alone made decisions and directed the work of those reporting to him/her. Today's effective supervisor encourages paid staff and volunteers to be increasingly involved in decisions that involve them and to take more responsibility for their actions.

When a staff member or lead volunteer is asked to supervise one or more volunteers in the organization, there is a need to clarify these factors:

- Role of the supervisor,
- Skills, qualities and tasks involved in supervision,
- How supervising volunteers is similar and unique as compared to supervising paid staff. Suggested procedures to carry out this function.

Even experienced supervisors find the transition to supervising volunteers challenging if the tasks and expectations are not clear. If the people expected to supervise volunteers have no experience with supervision, training clearly needs to be provided.

The role of supervisor encompasses many skills and techniques such as delegation, evaluation, training, etc., which are covered in other modules. This session does not attempt to cover component skills in depth, but rather to provide staff with a comprehensive overview of supervision while the facilitator augments the training with specifics as they relate to his/her organization.

Learning Objectives

The **primary purposes** of this module are to:

- Identify the basic skills and characteristics of good volunteer supervision.
- Clarify the supervisor's role in the organization.
- Explore methods and systems for carrying out this role.



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Upon completion of this module, the participant will be able to:

1. Understand and describe the role of supervisor.
2. Discover the similarities and uniqueness of supervising salaried versus non-paid staff.
1. Assess their competence in supervision skills and qualities of effective supervisors.
4. Explore various methods of supervising volunteers.

General Notes to Trainer

1. This workshop is in a suggested format. Feel free, however, to personalize it with your own stories. Also, phrase questions and activities in a manner most attuned to your organization.
2. Supervision of volunteers should have the same basic philosophy as supervision of paid staff. Your focus in this workshop is to reinforce your organization's philosophy and style of supervision while surfacing issues that make supervision of volunteers unique and often more challenging.
3. Because this topic is multifaceted, it is very important to stress that this is not a "how-to" workshop, nor is its intent to problem-solve around difficult personal supervision problems. As needs and issues that cannot be dealt with during this session surface, make sure to keep a list of them in clear view of participants and determine how they will be dealt with in future seminars or in-service training. (If participants continually wish to problem-solve around difficult volunteer situations, it may be appropriate to request a future in-service session on the module, "Dealing with Volunteer Performance Problems.")
4. Good supervision ultimately takes skill and time, but many staff and lead volunteers will need to grasp the reality that good supervision *saves* time and enhances volunteer performance. If the executive level staff do not understand this, they are unlikely to be supportive of the need to invest in establishing good supervision practices. Including them in the seminar may be a good start toward building buy-in and support for staff.
5. In this module, the facilitator can choose to present much of the information or have participants share their personal experiences and observations in a brainstorming fashion. The choice will be dependent on: 1) the time frame for delivering the information (brainstorming takes longer, but gets more buy-in and involvement); 2) whether you, as trainer, want an opportunity to share your expertise; and 3) the maturity and experience level of participants.



Presentation Overview

SLIDES/ HANDOUTS	SECTION	METHOD OF PRESENTATION	TIME
S-1 to 3	Introduction <ul style="list-style-type: none"> • Activity/Icebreaker • Introduction • Purpose • Learning Objectives • 4 Key Concepts 	Activity/Presentation	6 minutes
H-1			
S-4 to 9	Key Concept 1 Supervisory expectations	Interactive Presentation	10 minutes
H-2			
S-10 to 12	Key Concept 2 Skills of supervision	Presentation & Facilitated Discussion	12 minutes
H-3, H-4			
S-13 to 15	Key Concept 3 Uniqueness of volunteer supervision	Brainstorming	12 minutes
H-5			
S-16 to 17	Key Concept 4 Methods of supervision	Brainstorming	10 minutes
S-18	Summary/Wrap-up/ Evaluation	Presentation/Response	5 minutes
H-6			Total: 55 Minutes



Presentation Script

SLIDE/ HANDOUT	SECTION	TIME
S-1: Experience with Supervising Volunteers	<p>Start session with a quick icebreaker: If participants have had some experience with supervision, ask them to write down one word beginning with the letter "S" that best describes their previous experience with supervising volunteers. Show S-1 that gives some suggestions, but encourage them to use their own creativity to think of others:</p> <ul style="list-style-type: none"> • Successful • Stressful • So-So • Super • Smooth • Satisfying • Strenuous • Stormy <p>Have several participants share their word.</p>	6 minutes ▼
	<p>Debrief: Summarize the essence of what you hear. Generally you will have a mixture of responses. This is a result of one or several factors:</p> <ul style="list-style-type: none"> • Lack of clarity of what was expected of them when supervising. • Lack of feeling competent about the skill of supervision. • Lack of time to follow good principles of supervision effectively. • Experience with supervising difficult volunteers. <p>This activity leads naturally into a statement about the purpose of the seminar. Indicate that it is not an in-depth "how-to" session but rather a general view of the role and skills needed to be effective at supervising volunteers.</p>	
S-2: Learning Objectives S-3: 4 Key Concepts H-1: 4 Key Concepts of Supervising Volunteers	<p>Share Learning Objectives.</p> <p>Indicate that this workshop is built on 4 Key Concepts. Share S-3 briefly, indicating that each concept will be dealt with in the seminar.</p>	



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SLIDE/ HANDOUT	SECTION	TIME
S-4: Key Concept 1	<p align="center">Key Concept 1</p> <p>Staff and volunteers who are asked to supervise volunteers must clearly understand the organization's expectation of them in this role.</p> <p>Presentation: Supervision is an all-encompassing activity which involves the process of stimulating and overseeing the work of others.</p>	10 minutes ▼
S-5: Supervisory Skills	<p>It is important to remember that excellent supervisory skills are not measured by your personal accomplishments but by the success of those who report to you. Enhancing skills and techniques to support others in achieving their goals should be your aim. (If supervision is a new concept to your learners, you will need to expand their understanding of the basic principles of supervision.)</p> <p>It is imperative that staff and lead volunteers feel a sense of clarity concerning their roles and responsibilities with regard to supervising volunteers entrusted to them.</p>	
H-2: Supervising Volunteers - Agency Expectations	<p>Activity: Supervising tasks can be identified under four major categories. Tailoring this list to your organization, discuss the activities that are expected of your staff and lead volunteers who supervise volunteers.</p>	
S-6: Tasks: Preparation/Orientation	<p>Four Tasks involved in Supervision:</p> <p>1. Preparation/Orientation of volunteers to their positions</p> <ul style="list-style-type: none"> • Write the position descriptions. • Share position description with volunteers. • Introduce volunteers and staff to those with whom they interface. • Prepare work area. • Explain supervision and evaluation system. • Handle risk management issues. • Share relevant policies and procedures. 	
S-7: Tasks: Ongoing Support and Resources	<p>2. Ongoing support and resources</p> <ul style="list-style-type: none"> • Training • Coaching (on-the-job) • Ongoing informal appreciation of volunteer • Materials, information to support volunteers in their work 	



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SLIDE/ HANDOUT	SECTION	TIME
S-8: Tasks: Reporting Requirements	3. Reporting Requirements <ul style="list-style-type: none"> • Individual and overall volunteer hours • Impact of volunteer work • Written reports to Director of Volunteers (and others) • Periodic written volunteer reviews 	▲ (same 10 minutes)
S-9: Tasks: Evaluation	4. Evaluation <ul style="list-style-type: none"> • Annual (or other time frame) performance reviews of volunteers • Annual written evaluation of volunteers' work within the organization, your department, etc. <p>Have participants takes notes on H-2 to clarify expectations of them as supervisors of volunteers. Due to time constraints, you may wish to do a flip chart recording of those issues that surface which involve information, resources, or training beyond the scope of this session. Indicate to participants that, at the end of this in-service, you will return to this "unfinished business" list to determine next steps.</p>	
S-10: Key Concept 2	Key Concept 2 People who are competent supervisors of paid or unpaid staff share key skills and characteristics.	12 minutes ▼
S-11: Skills of a Good Supervisor H-3: Skills of Good Supervision	<p>Presentation: You must be a superb supervisor when working with volunteers because they can more readily leave the organization if they are discontent with the position, the supervision, etc. It is important to be reminded of some of the key skills and characteristics of good supervision. (You may wish to record ideas on a flip chart as they surface during this brainstorming session.)</p> <p>Ask participants to brainstorm what they think are the key skills and the key qualities of good supervisors. To assist them in their thinking process, ask them to reflect on the skills and qualities of someone who has been a particularly good supervisor to them.</p> <p>Brainstorm the necessary skills of good supervision. Answers should include:</p> <ul style="list-style-type: none"> • Delegation • Planning (goals and direction) • Coaching • Listening • Evaluation/review • Setting standards 	



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SLIDE/ HANDOUT	SECTION	TIME
<p><i>(continued)</i> S-11: Skills of a Good Supervisor H-3: Skills of Good Supervision</p>	<p><i>(continued)</i></p> <ul style="list-style-type: none"> • Climate setting • Conflict resolution • Recognition • Trainer/teacher • Team builder • Clear communications • Confrontation • Problem solving • Sharing knowledge 	<p>▲ (same 12 minutes)</p>
<p>S-12: Personal Qualities of a Good Supervisor</p>	<p>Personal Qualities of a Good Supervisor:</p> <ul style="list-style-type: none"> • Trustworthy • Consistent • Models good behavior • Positive attitude, sense of humor • Empowering • Supportive • Articulate 	
<p>H-3, H-4: Skills and Personal Qualities of Good Supervisors</p>	<p>Participant response: Give participants the H-3 and H-4 lists and ask them to add any new skills or qualities that surface in the brainstorming. Have individuals evaluate themselves relative to these skills and qualities, and asterisk any they wish to improve. Have them briefly (in dyads) share one area they would like to work to improve or learn more about. (If the workshop extends beyond the 55-minute time period, it would be good to have participants develop a specific plan to enhance their skills.)</p>	
<p>S-13: Key Concept 3</p>	<p style="text-align: center;">Key Concept 3: Although principles of supervision for volunteers and paid staff are very similar, there are some unique aspects to volunteer supervision.</p>	<p>12 minutes ▼</p>
<p>S-14: Activity H-5: Differences in Supervising Salaried and Volunteer Staff</p>	<p>Activity: Ask participants to divide into dyads and within two to three minutes identify any differences, concerns, or problems they have experienced between supervision of staff and volunteers.</p>	



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SLIDE/ HANDOUT	SECTION	TIME
<p><i>(continued)</i> S-15: Differences H-5: Differences in Supervising Salaried and Volunteer Staff</p>	<p>Debrief: Get group to briefly share some differences, asking that ideas be ones not previously mentioned. You may wish to record the responses on a flip chart or on a transparency. These and other ideas will most likely surface in the responses:</p> <ul style="list-style-type: none"> • Supervising volunteers is harder because they are frequently only available on a very part-time basis. • Some volunteers work at a distance from the organization and the supervisor. • If volunteers don't like their supervisor, they can more readily leave. Salaried staff generally need to stick it out. • It is particularly important to explain the supervision and evaluation system to volunteers before they start to work; they might not have had this experience with volunteering in the past. Salaried staff are more accustomed to supervision and evaluations. • Be clear to whom the volunteer reports, particularly if there is a Volunteer Coordinator and a work supervisor. • Volunteer supervision may take more time due to socializing needs that many volunteers wish to fulfill in their volunteer experience. • It frequently seems difficult to confront volunteers in problematic situations because they are "giving" their time. • Supervisors may need to be more flexible in working with volunteers since other activities may take priority in the volunteers' lives. <p>Debriefing: After participants have identified some unique aspects of supervising volunteers, ask which ones may be causing problems to them (time permitting). Do some problem solving: <i>What are some options for approaching this concern?</i> If problems cannot be resolved in this session, add these issues to the "unfinished business" list previously started and refer to list for planning purposes at the close of this in-service session.</p>	<p style="text-align: center;">▲ (same 12 minutes)</p>
<p>S-16: Key Concept 4</p>	<p style="text-align: center;">Key Concept 4 Supervision systems and methods can be varied, depending on the formality, size and style of the organization, type of position, and other factors.</p>	<p style="text-align: center;">10 minutes ▼</p>



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SLIDE/ HANDOUT	SECTION	TIME
<p>S-17: Supervision Methods H-6: Examples of Supervision Methods/Styles</p>	<p>Presentation: The key point is that an appropriate system of supervision be established, shared with the volunteer, and then followed through. Share examples of various methods of giving supervision.</p> <hr/> <p>Examples of Supervision Methods:</p> <ul style="list-style-type: none"> • Specific appointments at designated times. • Open time when volunteers can schedule appointments. • Monthly group or individual meetings. • Supervision by "walking around" (informal, as needed). • Regular reports or phone calls from volunteers who work off-site or virtually. • Regular e-mail or other electronic methods of relaying information or giving support. • Others (<i>elicit other methods from participants</i>). <hr/> <p>Discussion Ideas: (Optional) Discuss any suggested methods of supervision within your organization or with a specific kind of volunteer position.</p>	<p style="text-align: center;">▲</p> <p style="text-align: center;">(same 10 minutes)</p>
<p>S-18: Summary</p>	<p>Summary/Wrap-up/Evaluation Summarize and Plan Supervision is a complex activity which involves a number of skills and qualities to empower others to do their work effectively, especially when you are working with volunteers.</p> <p>Review the "unfinished business" list. Discuss options for ways to address the unresolved issues and problems which continue as barriers to effective supervision of volunteers in this organization.</p> <p>Distribute Participant Evaluation forms.</p> <p>End 55-Minute Training.</p>	<p style="text-align: center;">5 minutes</p> <p style="text-align: center;">▼</p>



Training Busy Staff to Succeed with Volunteers: The 55-Minute Training Series

“Thumbnail” View of Slides

**Training Busy Staff
to Succeed with Volunteers:
The 55-Minute Training Series**

Supervising Volunteers

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*Experience with Supervising
Volunteers*

- ▶ Successful
- ▶ Stressful
- ▶ So-so
- ▶ Super
- ▶ Smooth
- ▶ Satisfying
- ▶ Strenuous
- ▶ Stormy
- ▶ Others...

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Learning Objectives

- ▶ Define the role of supervisor of volunteers.
- ▶ Explain the similarities and differences in supervising paid versus non-paid staff.
- ▶ Evaluate general competence in supervision and qualities of effective supervisors.
- ▶ Discuss various methods of supervising volunteers.

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4 Key Concepts

1. Staff and volunteers who are asked to supervise volunteers must clearly understand the organization's expectation of them in this role.
2. People who are competent supervisors of paid and unpaid staff share key skills and characteristics.
3. Although principles of supervision for volunteers and staff are very similar, there are some unique aspects of volunteer supervision.
4. Depending on formality, size and style of the organization, type of position, etc., supervision systems and methods can be quite varied.

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Key Concept 1

- ▶ Staff and volunteers who are asked to supervise volunteers must clearly understand the organization's expectation of them in this role.

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Supervisory Skills

- ▶ Excellent supervisory skills are not measured by your personal accomplishments, but by the success of those who report to you.
- ▶ Supervisory tasks fall into 4 categories:
 - Preparation/orientation
 - Ongoing support
 - Reporting
 - Evaluation

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Preparation/Orientation

- ▶ Written position description
- ▶ Introductions to staff and volunteers
- ▶ Work area preparations
- ▶ Supervision and evaluation system explained
- ▶ Risk management issues handled
- ▶ Relevant policies and procedures shared

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*Ongoing Support and
Resources*

- ▶ Training
- ▶ Coaching (on-the-job)
- ▶ Ongoing informal appreciation
- ▶ Materials/information to support the work

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Reporting Requirements

- ▶ Individual and overall volunteer hours
- ▶ Impact of volunteer work
- ▶ Reports to Director of Volunteers and others
- ▶ Periodic written volunteer reviews

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Evaluation

- ▶ Annual (or other timeframe) performance reviews of volunteers.
- ▶ Annual written evaluation of volunteers' work within the organization, your department, etc.

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Key Concept 2

- ▶ People who are competent supervisors of paid or unpaid staff share key skills and characteristics.

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Skills of a Good Supervisor

- ▶ Trainer/educator
- ▶ Team builder
- ▶ Delegation
- ▶ Planning
- ▶ Coaching
- ▶ Listening
- ▶ Conflict resolution
- ▶ Communication
- ▶ Confrontation
- ▶ Problem solving
- ▶ Evaluation/review
- ▶ Climate setting
- ▶ Sharing knowledge
- ▶ Setting standards

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“Thumbnail” View of Slides (continued)

Personal Qualities of a Good Supervisor

- ▶ Trustworthy
- ▶ Consistent
- ▶ Models good behavior
- ▶ Positive attitude, sense of humor
- ▶ Empowering
- ▶ Supportive
- ▶ Articulate

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Key Concept 3

- ▶ Although the principles of supervision for volunteers and paid staff are very similar, there are some unique aspects to volunteer supervision.

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Activity

- ▶ What are some special aspects of supervising volunteers which make the process unique and in some circumstances more difficult than supervising paid staff?

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Uniqueness/Differences

- ▶ Part-time basis
- ▶ Working at a distance
- ▶ Volunteers more free to leave if dissatisfied
- ▶ Good supervision may be new experience for volunteer
- ▶ Confusion over “who is my supervisor?”
- ▶ May take more time for socializing needs
- ▶ Difficult to confront a volunteer
- ▶ Volunteers may need more flexibility

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Key Concept 4

- ▶ Supervision systems and methods can be varied, depending on the formality, size and style of the organization, type of position, and other factors.

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Supervision Methods

- ▶ Specific appointments at designated times
- ▶ Open time for scheduling appointments
- ▶ Monthly group or individual meetings
- ▶ Supervision by “walking around”
- ▶ Regular reports/phone calls to and from volunteers working off site
- ▶ E-mail updates

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Summary

- ▶ Supervision is a complex activity which involves a number of skills and qualities to empower others to do their work effectively, especially when you are working with volunteers.

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Suggestions for Expanded Activities for Sessions over 55 Minutes:

1. This workshop could be the first segment of a half- or full-day seminar on supervision. Other topics that might be included are: motivation, delegation, training, volunteer performance problems, etc.
2. For participants who are not trained in the skills and techniques of supervision and coaching, introductory training on the basics of supervision should be provided. If a number of staff and volunteers need this training, it may be more cost-effective to bring in a trainer who specializes in supervision. Anyone in the organization who does any supervision of staff or volunteers could benefit.
3. Develop a written handout which includes your organization's expectations of those entrusted with the supervision of volunteers. Distribute during the discussion of Key Concept 2.
4. Key Concept 3 (the uniqueness of supervising volunteers) could be the focus of a 45-minute discussion. It would be particularly useful to discuss problems your organization experiences due to these differences, and look at options for new approaches to these realities. (For example, if you realize that volunteers need some flexibility in a regular assignment, you might develop a list of trained substitutes that they can call when they are unable to fulfill their commitment.)
5. As participants and trainer uncover the varied skills and characteristics of effective supervisors, it's a good time to discover if participants would like more in-depth training or resources in these areas (coaching, listening, etc.) to enhance their skills.
6. To expand the discussion of supervision methods (Key Concept 4), discuss the pros and cons of the various methods and appropriate situations for each type to be used. Topics such as situational leadership and leadership styles could help participants see the need for possessing a variety of techniques to supervise a diverse group of volunteers effectively.



Suggested Resources on Supervising Volunteers

Books

Chapman, Elwood. *The New Supervisor: Stepping Up With Confidence (A Crisp Fifty-Minute Book)*. Crisp Learning, 2002. Order from <http://www.amazon.com/> .

Lee, Jarene Frances with Julia Catagnus. *What We Learned (the Hard Way) About Supervising Volunteers*. Philadelphia: Energize, Inc., 1998. Order from <http://www.energizeinc.com/bookstore.html> .

Graff, Linda L. "Supervision and Ongoing Placement Support." Chapter 9 in *Best of All: The Quick Reference Guide To Effective Volunteer Involvement*. Dundas, ON: Linda L. Graff & Associates, 2005. Order from <http://www.lindagraff.ca> or the e-book edition at <http://www.energizeinc.com>.

McCurley, Steve and Rick Lynch. *Volunteer Management: Mobilizing all the Resources of the Community*, revised ed. Kemptville, ON: Johnstone Training and Consultation, Inc., 2006. Order at <http://www.energizeinc.com/bookstore.html> or <http://www.bettystallings.com/> .

Articles

From *e-Volunteerism: The Electronic Journal of the Volunteer Community*, <http://www.e-volunteerism.com> .

Ellis, Susan J. and Steve McCurley. "How Many Supervisors Does it Take To Screw in A Volunteer?" *e-Volunteerism: The Electronic Journal of the Volunteer Community*, Vol. IV, Issue 1, Oct-Dec 2003.

Elliston, Sarah. "Integrity – The Guide Post to Volunteer Relationships." *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. III, Issue 1, October-Dec 2002.



Handout 1

The 4 Key Concepts of Supervising Volunteers

1. Staff and volunteers who are asked to supervise volunteers must clearly understand the organization's expectation of them in this role.
2. People who are competent supervisors of paid or unpaid staff share key skills and characteristics.
3. Although principles of supervision for volunteers and paid staff are very similar, there are some unique aspects to volunteer supervision.
4. Supervision systems and methods can be varied, depending on the formality, size and style of the organization, type of position, and other factors.



Handout 2

Supervising Volunteers

What are your organization’s expectations of you?

Preparation/ Orientation of Volunteer to Position	Yes	No
Write position description		
Share position description with volunteer		
Introduce volunteers and staff		
Prepare work area (if appropriate)		
Explain supervision/evaluation system		
Share risk management issues		
Share relevant policies/procedures		
Ongoing Support and Resources	Yes	No
Training		
Coaching (on the job)		
Ongoing informal appreciation of volunteer		
Materials/information to support volunteers		
Reporting Requirements	Yes	No
Individual and overall volunteer hours		
Impact of volunteer work		
Reports to Director of Volunteers/others		
Periodic written volunteer reviews		
Evaluation	Yes	No
Mutual performance review of volunteers		
Annual evaluation of volunteers’ contributions		



Handout 3

Skills of a Good Supervisor

Rank yourself on these skills of good supervision:

WEAK < _____ > STRONG

Delegation	
Planning	
Coaching	
Listening	
Conflict Resolution	
Recognition	
Trainer / teacher	
Team Builder	
Communications	
Confrontation	
Problem Solving	
Evaluation / Review	
Climate Setting	
Sharing Knowledge	
Setting Standards	

Identify two key skills you personally wish to improve and your plan for skill enhancement:

<u>Skill</u>	<u>Plan</u>
1. _____	
2. _____	



Handout 4

Personal Qualities of a Good Supervisor

What qualities are the most important to you in people who supervise your work? *(Circle your top three choices.)*

Trustworthy

Consistent

Models Good Behavior

Positive Attitude

Empowering

Supportive

Articulate

Others:



Handout 5

Differences between Supervision of Volunteer and Salaried Staff

1. Supervising volunteers is harder because they are frequently only available on a very part-time basis.
2. Some volunteers work at a distance from the organization and the supervisor.
3. If volunteers don't like their supervisor, they can more readily leave. Salaried staff generally need to stick it out.
4. It is particularly important to explain the supervision and evaluation system to volunteers before they start to work; they might not have had this experience with volunteering in the past. Salaried staff are more accustomed to supervision and evaluations.
5. Often volunteers report to more than one supervisor in conjunction with their work.
6. Volunteer supervision may take more time due to socialization needs that many volunteers wish to fulfill in their volunteer experience.
7. It is frequently more difficult to confront volunteers in problematic situations because they are "giving" their time.
8. Supervisors may need to be more flexible in working with volunteers since other activities may take priority in their lives.

What other differences have you noticed/experienced?

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



Handout 6

Examples of Supervision Methods and Styles

Many variables determine the best types of supervision methods

- Nature of the position
- Capability/experience of volunteer with work and with the organization
- Number of volunteers reporting to one person
- Whether volunteers work in the office or at a distance
- Whether volunteers have consistent or flexible working hours
- Whether it is a short-term or long-term project/position
- Others:

Examples of Supervision Methods/Styles

- Specific appointments at designated times
- Open time when volunteers can schedule appointments
- Monthly group or individual meetings
- Supervision by “walking around” (informal, as needed)
- Regular reports or phone calls from volunteers who work off-site
- Regular email or other electronic methods of relaying information or giving support
- Others:



Participant Evaluation Form

Thank you for taking the time to share your evaluation of today's seminar. Your critique is valued and will be considered as we continually strive to improve our support to all personnel who team with volunteers.

1. Check the appropriate box to indicate whether you **met**, **partially met**, or **did not meet** the following learning objectives for this workshop:
 - a. Define the role of a supervisor.
 met *partially met* *did not meet*
 - b. Explain the uniqueness and similarities of supervision of paid and non-paid staff.
 met *partially met* *did not meet*
 - c. Evaluate your competence in the skills and characteristics of effective supervision.
 met *partially met* *did not meet*
 - d. Discuss the various methods of supervising volunteers.
 met *partially met* *did not meet*

Comments:

2. This session was:

- | | | |
|--------------|------------------------------|-----------------------------|
| Helpful: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Provocative: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Practical: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Well-paced: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too short: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too long: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |

Comments:



Training Busy Staff to Succeed with Volunteers:
The 55-Minute Training Series – Evaluation Form

Participant Evaluation Form (continued)

3. This trainer was:

- Knowledgeable: YES NO
Prepared: YES NO
Organized: YES NO
Enthusiastic: YES NO
Good discussion facilitator: YES NO

Comments:

4. In what ways can you utilize this material in your work?

5. What, if anything, do you plan to do differently as a result of this training?

6. What additional information on this or any other topic dealing with volunteers would be helpful to you in your work?

7. What suggestions do you have to strengthen this workshop?

8. Further comments or suggestions:

NAME (optional) _____

Training Busy Staff to Succeed with Volunteers: *The 55-Minute Training Series*

PowerPoint® Slides

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Trainer's Guide for Presenting... *Orienting and Training Volunteers*

Betty Stallings

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Orienting and Training Volunteers

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Trainer's Guide for Presenting the *Orienting and Training* Module

Introduction to Orientation and Training

The early relationship a volunteer has with an organization has tremendous impact on the future success of the partnership between the organization and the volunteer. When volunteers are not genuinely welcomed and/or given the information they need to successfully serve the organization, they frequently leave. If they stay, their experience may be jeopardized by inadequate preparation and general lack of support for volunteers to perform well. Many early retention problems originate in poor orientation and training of volunteers to perform the work assigned.

It is critical that organizations that engage volunteers think carefully about the general information a volunteer needs to establish a clear relationship with the organization (e.g., its history, goals, values, general operating procedures, etc.) and what specific training/support is needed to effectively carry out the work for the organization. There is not a “one-way-fits-all” approach to training, but every organization must be clear on what information is needed, who is responsible for delivering it, what the best methods are of sharing the information for your situation, and how your orientation and training agendas are refreshed and updated for new and long-term volunteers.

Often, if the organization has a volunteer manager, that person will design the overall orientation to the organization and will involve appropriate staff and volunteers in its delivery. The staff or volunteers directly supervising a volunteer's work will be responsible for any specific orientation to their department, area, or region, and for the knowledge and skills-training to carry out the work the volunteer will be performing under their supervision.

Technology has opened many avenues for innovation in delivering orientation and training. It is, therefore, important to constantly update to the most efficient and effective way to share critical information with volunteers.

Learning Objectives

The **primary purposes** of this module are to:

- Explore the rationale and elements of volunteer orientation and training.
- Deal effectively with the challenges posed by orientation and training.



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Upon completion of this module, the participant will be able to:

1. Distinguish between volunteer orientation and volunteer training.
2. Know what should be included in orientation, how it can be delivered, and by whom.
3. Understand what is included in training, how to deliver it effectively to volunteers, and by whom.
4. Identify and respond to challenges in orientating and training today's volunteers.
5. Evaluate and improve their orientation and training so as to continually keep it relevant and useful.

General Notes to Trainer

1. This workshop is in a suggested format. Feel free, however, to personalize it with your own stories. Also, phrase questions and activities in a manner most attuned to your organization.
2. Although the focus of this module is orienting and training *volunteers*, the skill is a generic one which may have broader applicability to the participants. In fact, you may want to consult with the human resources/personnel manager in your agency about the ways employment applicants are oriented and trained. If applicable, you might even consider team training with this staff member.
3. Most people have had many experiences where they have been poorly oriented or trained. Having participants recall personal experiences of being oriented and/or trained effectively will immediately begin to reinforce the art and skills involved.
4. It is important to reiterate that this is a cursory overview of the skills of orientation and training. Because of the significance of orientation and training in successful retention of volunteers, I would recommend that you request that this seminar be longer than 55 minutes. This in-service session could also be offered in two time slots, allowing for focus exclusively first on orientation, and then on training. There are extensive resources on both topics that could enhance your knowledge of these skills.
5. Because there are four concepts to cover, presentations and facilitation must be crisp and timed. If participants want more information, use this as an opportunity to ask for future additional training time on the topic.
6. Orientation and training are significant aspects of good supervision and thus you may want to include these topics in a half-day session on successfully supervising volunteers.
7. There are numerous resources on orientation and training. Books that I discovered to be particularly useful or applicable to orienting and training of volunteers are mentioned under Resources at the end of this training module.



Presentation Overview

SLIDES/ HANDOUTS	SECTION	METHOD OF PRESENTATION	TIME
S-1 to 5	Introduction <ul style="list-style-type: none"> • Purpose of Workshop • Introductory Comments • Learning Objectives • Opening Exercise • 4 Key Concepts 	Presentation	8 minutes
H-1			
S-6 to 8	Concept 1 Focus: Orientation	Themes derived from questionnaire are shared and discussed	12 minutes
H-2			
S-9 to 15	Concept 2 Focus: Training	Presentation & Facilitated Discussion	15 minutes
H-3, H-4			
S-16 to 18	Concept 3 Challenges in Orientation/Training	Small Group Activity: Brainstorm/problem solve	10 minutes
H-5			
S-19 to 22	Concept 4 Evaluating Orientation/Training	Facilitated Discussion	8 minutes
H-6			
S-23	Summary/Wrap-up/ Evaluation	Brief Presentation	2 minutes
H-7			Total: 55 Minutes



Presentation Script

SLIDE/ HANDOUT	SECTION	TIME
	<p>Possible pre-session activity: Handout 2 is a multi-page checklist covering a myriad of topics in orientation. If at all possible, I suggest that participants fill this out prior to the session to save time. If staff do not know the answers, that is a good entry point to share information and to get their input.</p>	
<p>Introductory comments and Activity</p> <p>S-1 to 2: Purposes/ Objectives of training</p> <p>S-3: Warm-up questions</p> <p><i>You may want to capture these themes on a flip chart if it is a small staff group</i></p>	<p style="text-align: center;">Opening Comments and Exercise</p> <ul style="list-style-type: none"> • Begin by summarizing the purpose/objectives of orientation and training and give any introductory comments that tie the topic with issues of effectively engaging volunteers in your organization. • To get the participants thinking about volunteer orientation and training, start by asking them to think of a time when they volunteered and have them recall the manner in which they were made to feel at home with the new organization/ position/task. If they had a bad experience, they can use that in this exercise, too. • Ask participants: <ul style="list-style-type: none"> • How helpful was the orientation as to the mission, structure, history, and people involved in the organization? • How were they specifically trained (or what was not done) to perform the volunteer position? Did they feel competent? Supported to do the work? Was the training well-planned and was it more or less than needed? Helpful? Effective in the use of time? Other responses? • Debrief their answers. You may want to summarize some of the themes that surfaced from the above sharing. Most likely the experiences shared will lead to these conclusions: <ul style="list-style-type: none"> • When folks are effectively oriented and trained they are far more apt to stay with the organization. • Ineffective orientation and/or training leads to confusion, misunderstanding, and frequently a lack of ongoing volunteer participation. 	<p>8 minutes ▼</p>



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SLIDE/ HANDOUT	SECTION	TIME
<p>S-4 to 5: Key Concepts H-1: Key Concepts of Orientation and Training</p>	<p>This in-service training is built on 4 Key Concepts.</p> <p>Proceed through the concepts, highlighting each in turn. Indicate that during the workshop each concept will be examined together with relevant material.</p> <p><i>You may choose to distribute all handouts for this module at this time. Then participants can fully participate in the discussion, knowing that their handouts cover all key information shared in the seminar and will have copies of seminar activities.</i></p>	<p>▲ (same 8 minutes)</p>
<p>S-6: Key Concept 1</p> <p>H-2: Orientation Checklist</p>	<p>Key Concept 1 A volunteer's orientation to an organization/program should include information on its mission, fundamental values, systems and structure, history, future plans, and social community.</p> <p>Presentation: Every program will have a different type of orientation. Perhaps the best way to design or re-design yours is to imagine yourself in a totally unfamiliar environment. You don't know the physical layout, the people, the expectations, the purpose of the organization, the rules, etc.</p> <p>Orientation is essentially what you would need to know to understand and be comfortable in this new environment.</p> <p><i>For purposes of discussing this concept, use Handout 2 which is a multi-page checklist covering a myriad of topics in orientation. As suggested above, if possible ask participants to fill this out prior to the session to save time. If staff do not know the answers, that is a good entry point to share information and to get their input.</i></p>	<p>12 minutes ▼</p>
<p>S-7: Orientation Checklist</p>	<p>The Orientation Checklist covers:</p> <ul style="list-style-type: none"> • Topics that could be included. • Who should be involved in orienting volunteers? • Methods of sharing orientation. • When are the best times to offer orientation? • Other issues such as the time lapse between when a volunteer first expresses interest and eventually receives orientation, and who gets oriented. 	



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SLIDE/ HANDOUT	SECTION	TIME
<i>(continued)</i> S-7	Get feedback from participants who filled out the checklist and discuss relevant themes and recommendations that involve staff roles in orientation. <i>(This may be particularly relevant if you are in a big organization and volunteers need both a general orientation to the whole organization and also orientation to their specific work setting).</i>	▲ (same 15 minutes)
S-8: Potential Issues	<p>Discuss results relevant to your program:</p> <ul style="list-style-type: none"> • Determine if there are any topics not sufficiently covered. • Discover if the orientation could be enhanced with participation of more staff/volunteers. • Review and update methods of sharing information and the accuracy of information. • Look at average time lapse between expressed volunteer interest and orientation. Can it be compressed? • Is it more efficient for some orientation to be shared prior to volunteers registering, thus serving as a way for volunteers to screen themselves out and not go through the organizational interview and training procedures? • Does the volunteer program need to consider how to orient shorter term (even single-day) volunteers so that they can become informed advocates for the organization? 	
S-9: Key Concept 2	<p style="text-align: center;">Key Concept 2</p> <p>Training is the process of equipping volunteers with the appropriate skills and knowledge to effectively carry out the work they have agreed to perform for the organization.</p>	15 minutes ▼
H-3: Volunteer Training S-10: Topics	<p><i>Training is an in-depth skill set. The purpose of this section is to cover the potential topics and methods that can be utilized in training volunteers and is not intended to provide professional training for those who use this skill on a regular basis.</i></p> <p>Potential Topics to Include in Volunteer Training:</p> <ul style="list-style-type: none"> • Skills needed to perform the task/role • Knowledge and information needed • Attitudes needed for healthy and successful performance of the position 	



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SLIDE/ HANDOUT	SECTION	TIME
S-11 : Activity	<p>Ask participants to indicate what skills, knowledge and attitudes they include in their training of volunteers.....</p> <p>Possible Activity You might ask them to list one job that they supervise a volunteer to perform and to indicate what skills, knowledge and attitudes they include in their training or coaching of that individual.</p>	<p>▲ (same 15 minutes)</p>
S-12 to 13: Two Major Styles	<p>Two Major Styles of Sharing Information:</p> <ul style="list-style-type: none"> • Formal training sessions. Material presented as instruction, usually in a group, classroom-style setting. Can include: <ul style="list-style-type: none"> ○ lectures ○ readings ○ discussions ○ field trips ○ scenario discussions ○ role-plays ○ case studies • Informal coaching, mentoring, on-the-job support provides the same information as formal training but delivered on a one-to-one, as needed basis through techniques such as: <ul style="list-style-type: none"> ○ Demonstration of the skill. ○ Observing as volunteer performs the skill. ○ Giving feedback and additional support, if needed, for successful performance of the task/position. 	
S-14 : Potential Topics	<p>Topics covered in either style include:</p> <ul style="list-style-type: none"> • Necessary skills, attitudes, and knowledge to perform the job and any authority in decision making. • Boundaries concerning what the volunteer can and cannot do and why. • How to handle emergencies or other occasions which might occur in your organization. • With whom volunteers work and how their responsibilities fit in with other staff and volunteer roles. • How the volunteer position fits into the larger mission of the organization. 	



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SLIDE/ HANDOUT	SECTION	TIME
<p>H-4: Volunteer Training Tips</p> <p>S-15: Special Tips</p>	<p>Special Tips on Training Volunteers: <i>(Depending on the sophistication of your participants, you may want to ask them to offer some of their personal training tips before offering these and others you might add.)</i></p> <ul style="list-style-type: none"> • Make sure that, as information changes, current volunteers are given that new information or additional skill. • Record training that volunteers have completed, as well as any required special training or updated training. • Develop a check list for monitoring the completion of all training required for a position to ensure that volunteers receive all needed training and, if appropriate, are tested and competent in those skills. • Make use of online, distance-learning capability to enhance training (such as posting updated information sheets to a password-protected Web area) and to provide training more efficiently if volunteers work off-site or virtually. • Always give volunteers written information (handouts) to reinforce learning/training and to keep for reference at a later time. • Consider the specific training needs of volunteers. In large group training, it may be best to have times when the group divides up according to specific training needs necessary to carry out the positions. • Some volunteers come with great skills but need extensive orientation so that they can carry out the work within your organizational structure and values. • Involve volunteers in training other volunteers. It is a great way to give new opportunities to experienced volunteers and to acknowledge their accomplishments and capabilities. 	<p style="text-align: center;">▲</p> <p>(same 15 minutes)</p>
<p>S-16 : Key Concept 3</p>	<p style="text-align: center;">Key Concept 3</p> <p>There are considerable challenges you face in orienting and training today's volunteers.</p>	<p>10 minutes</p> <p style="text-align: center;">▼</p>



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SLIDE/ HANDOUT	SECTION	TIME
<p>H-5 : Challenges and Issues S-17 to 19 : Potential Challenges</p>	<p>Activity Utilizing the checklist of challenges on Handout 5, discuss which ones are relevant to your organization and suggest ways to diminish them. Often the best way to begin to solve problems is to ask the right questions and allow participants collectively to find fresh ways and answers to new (and continued) challenges.</p> <p>Sample Questions to Discuss: <i>(I suggest that you select the ones most pertinent to your situation/organization/participants. Break into small groups, give one question to each group to discuss, and report back to whole group.)</i></p> <ol style="list-style-type: none"> 1. Timing Issues: <ul style="list-style-type: none"> • How do we deal with the fact that volunteers have limited time and consider that as we plan orientation and training? • How can we justify staff time involved in orientation/training? • How do we adapt our orientation/training for short-term volunteers? • What is the best timing for giving orientation information? (Before people register to volunteer, after they register and before they begin, gradually, as needed, etc.?) 2. How can we best orient and train volunteers who live at great distances from our physical buildings but who need to feel a part of our mission and motivated to carry out their work? 3. How can we deal with the varying skill levels of volunteers in our training program? 4. How can we know that volunteers have reported their skills and knowledge accurately? 5. How can we be more confident that, after training, volunteers have the skills, knowledge, and attitudes to perform the work and fit into our culture? 6. What are some less time-consuming ways to deliver orientation/training electronically? Do we have volunteers who could help us design new online methods of sharing information? 7. How do we keep long-term volunteers refreshed on new skills and information required to carry out work? 	<p style="text-align: center;">▲</p> <p>(same 10 minutes)</p>



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SLIDE/ HANDOUT	SECTION	TIME
<p><i>(continued)</i> H-5 S-17 to 18</p>	<p>8. How can we attract volunteers who are professional trainers and could teach training techniques to our staff?</p> <p>9. How much orientation information should we share at our community information/recruitment meetings?</p> <p>10. How can we make our orientation/training more fun? More involving?</p> <p>11. How can we create user-friendly handbooks for staff and volunteers?</p> <p>12. How can we share our “culture” with volunteers in our orientation?</p> <p>13. How can we you make in-service training attractive?</p>	<p>▲ (same 10 minutes)</p>
<p>S-19 : Key Concept 4</p>	<p>Key Concept 4 It is important to evaluate and improve your orientation and training program to continually keep it relevant and helpful.</p>	<p>8 minutes ▼</p>
<p>S-20 : Activity</p>	<p>Discussion/Activity Ask participants: How are we keeping our (your) orientation and training activity continually improving? How do we evaluate it?</p>	
<p>S-21: Immediate Feedback H-6 : Evaluation</p>	<p><i>Add these additional comments if they don't arise from the above discussion:</i> After Orientation Session(s) Get immediate feedback from any orientation session, including such questions as:</p> <ul style="list-style-type: none"> • Did we answer all questions you came with regarding volunteering with our organization? • Did we use your time efficiently? • Did you feel a welcoming atmosphere with our orientation? • Did the orientation make you question your interest in volunteering with our organization? • Please share any ways that we might improve our orientation session. 	



Training Busy Staff to Succeed with Volunteers: The 55-Minute Training Series

SLIDE/ HANDOUT	SECTION	TIME
<p><i>(continued)</i> S-21 H-6</p>	<p><i>(continued)</i> <u>After Training/Coaching Session(s)</u> Get immediate feedback after specific training sessions, including such questions as:</p> <ul style="list-style-type: none"> • Do you feel confident that the training has adequately prepared you for your work at our organization? • Are there any aspects of the training that you felt were weak or inadequate? • Was your time well used while being trained? • Did you have opportunities to test out new skills, if appropriate? • Please share any thoughts on how we might improve our training. 	<p>▲ (same 8 minutes)</p>
S-22 : After	<p><u>After the volunteer has been on the job for a designated period of time</u> Often the most helpful evaluations come after the volunteer has an opportunity to carry out the work assigned. At that point, she/he will have an opportunity to determine how effective orienting/training was.</p> <ul style="list-style-type: none"> • In order to evaluate orienting/training, here's a perfect question to ask volunteers on a regular basis: "Is there anything you have experienced on the job that we have not adequately prepared you for?" 	
<p>S-23 : Closing Thoughts H-7 : Participant Evaluation Form</p>	<p>Closing Comments</p> <p>Effective orientation and training are key elements that impact the ultimate satisfaction of volunteers and lead directly to retention, effectiveness, and volunteer productivity. Continually work to build in time to give volunteers a great chance to be successful partners in your mission. Friendly, helpful organizational orientation and excellent skills and knowledge training will go a long way in reaching this goal.</p> <p>Distribute Participant Evaluation forms.</p> <p>End 55-Minute Training.</p>	<p>2 minutes ▼</p>



Training Busy Staff to Succeed with Volunteers: The 55-Minute Training Series

“Thumbnail” View of Slides

Training Busy Staff
to Succeed with Volunteers:
The 55-Minute Training Series

*Orienting and Training
Volunteers*

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Purposes of this Session

- ▶ To explore the rationale and elements of volunteer orientation and training.
- ▶ To deal effectively with the challenges posed by orientation and training.

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Learning Objectives

- ▶ Distinguish between volunteer orientation and volunteer training.
- ▶ Know what can be included in orientation, how it can be delivered, and by whom.
- ▶ Understand what is included in training, how to deliver it effectively to volunteers, and by whom.
- ▶ Identify and respond to challenges in orienting and training today's volunteers.
- ▶ Evaluate and improve orientation and training so as to continually keep it relevant and useful.

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Warm-up Discussion

Think about a time when you volunteered.

- ▶ Recall the manner in which the organization made you feel at home with the new setting, position, or task.
- ▶ How helpful was the orientation?
- ▶ How were you specifically trained to be competent in carrying out the position/task?

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4 Key Concepts

1. A volunteer's orientation to an organization or program should include information on its mission, fundamental values, systems and structure, history, future plans, and social community.
2. Training is the process of equipping volunteers with appropriate skills and knowledge to carry out the work they have agreed to perform for the organization effectively.

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4 Key Concepts

3. There are considerable challenges you face in orienting and training today's volunteers.
4. It is important to evaluate and improve your orientation and training program to continually keep it relevant and helpful.

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Key Concept 1:

- ▶ A volunteer's orientation to an organization or program should include information on its mission, fundamental values, systems and structure, history, future plans, and social community.

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Orientation Checklist

- ▶ Topics that could be included
- ▶ Who should be involved in orientation
- ▶ Methods of sharing orientation
- ▶ Best times to offer orientation
- ▶ Time lapse between volunteer interest and opportunity for orientation
- ▶ Which volunteers get orientation

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Potential Orientation Issues

- ▶ Any topics not covered?
- ▶ Ways to involve more staff/volunteers?
- ▶ Is information updated and accurate?
- ▶ Can time lapse be compressed between volunteer interest and orientation?
- ▶ Should any orientation occur before volunteers register to volunteer?
- ▶ How do we orient short-term volunteers and what should be included?

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Key Concept 2

- ▶ Training is the process of equipping volunteers with the appropriate skills and knowledge to effectively carry out the work they have agreed to perform for the organization.

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Topics to Include in Training

- ▶ Skills needed to perform the task/position.
- ▶ Knowledge and information needed to perform the task/position.
- ▶ Attitudes needed for healthy and successful performance of the position.

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Activity

Indicate one situation in which you supervise a volunteer to perform a task/position.

- ▶ What **skills, knowledge** and **attitudes** do you include in the training or coaching of that individual?

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“Thumbnail” View of Slides (continued)

Two Major Styles of Training

- ▶ **Formal Training Sessions**
 - Classroom style
 - Lectures
 - Discussion
 - Field trips
 - Scenario discussions
 - Role plays
 - Case studies
 - Possible test to determine mastery of information

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Two Major Styles of Training

- ▶ **Informal Coaching/On-The-Job**
 - Demonstrating the skill
 - Observing as volunteer performs it and giving feedback
 - Giving additional support, as needed

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Potential Topics in Training

- ▶ Skills, attitudes and knowledge to perform the job and any authority in decision making.
- ▶ Boundaries in what the volunteer can and cannot do and why.
- ▶ How to handle emergencies or other occasions.
- ▶ Who the volunteer works with and how his/her responsibilities fit with other staff and volunteer roles.
- ▶ How the volunteer position fits into the larger mission of the organization.

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Special Tips

- ▶ Keep all volunteers updated.
- ▶ Keep records on training completed.
- ▶ Develop a checklist to monitor required training.
- ▶ Use online, distance-learning options.
- ▶ Always give written handouts, too.
- ▶ Divide into groups by training needs.
- ▶ Skilled volunteers still need orientation.
- ▶ Involve volunteers in training other volunteers.

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Key Concept 3

- ▶ There are considerable challenges you face in orienting and training today's volunteers.

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Potential Challenges

- ▶ Timing Issues
- ▶ Issues of volunteers working at a distance from the organization
- ▶ Varying skill and knowledge levels
- ▶ Accuracy of volunteer's self reported skills
- ▶ Ways to determine if training built competence to carry out the position/task
- ▶ New ways to carry out orientation/training that are more time efficient and utilize electronics

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Potential Challenges

- ▶ How to keep long-term volunteers updated
- ▶ How to attract volunteer trainers
- ▶ How can we make it fun and engaging
- ▶ How to create user-friendly handbooks for staff and volunteers
- ▶ How to share our "culture" with new volunteers in our orientation sessions
- ▶ How to make in-service training attractive to volunteers

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Key Concept 4

- ▶ It is important to evaluate and improve your orientation and training program to continually keep it relevant and helpful.

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Discussion/Activity

- ▶ How do we keep our orientation and training activity continually improving?
- ▶ How are we evaluating it?

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Evaluation of Orientation and Training

- ▶ **Immediate feedback**
 - After Orientation Session – examples:
 - » Did we answer all questions?
 - » Use your time efficiently?
 - » Did you feel a welcoming atmosphere?
 - After Training Session – examples:
 - » Do you feel adequately prepared for your work?
 - » Was any part of the training weak or inadequate?
 - » Was your time well used?
 - » Did you have opportunities to test out new skills?

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Evaluation of Orientation and Training

- ▶ After the volunteer has been on the job.
 - **Great question:**
Is there anything you have experienced on the job that we have not adequately prepared you for?

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Closing Thoughts

- ▶ **Effective orientation and training:**
 - Impact the ultimate satisfaction of volunteers.
 - Lead directly to retention, effectiveness, and volunteer productivity.
- ▶ Continually work to build in time to give volunteers a great chance to be successful partners in your mission.

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Suggestions for Expanded Activities for Sessions over 55 Minutes:

1. If you would rather not introduce the activities themselves, you can ask participants the questions associated with the activities. Then field the answers and surface themes and suggestions that arise from the discussion for later attention.
2. You can teach this topic by expanding on the warm-up exercise in which participants share their personal experience with orientation and training. Isolate each topic and discover what you learn from their experiences, including those that are effective or not-so-effective. Then apply this information to your situation at your organization or program.
3. If volunteer orientation is provided by others (such as through the Volunteer Resources Office) and the staff you are training are responsible for very little orientation, you may want to cut out the section on orienting (Key Concept 1) and focus on training.
4. If orientation is not being effectively carried out, give participants the worksheet on orientation issues, topics, etc., ahead of time so that they are prepared to come and discuss their findings and recommendations. You may even ask that they e-mail their responses to you ahead of time so that you can surface themes and begin to deal with those most prevalent in your organization/program.
5. In discussing training, you may want to select a typical volunteer position within your organization and put it through the test of what skills, knowledge, and attitudes would be needed in training a volunteer to do this work. If you have a longer session, you can then ask participants to think through a volunteer position that reports to them and how they provide or should provide training.
6. Since many organizations have on-the-job training, it may be important to explore what that means and how to best use techniques of coaching (demonstrating, having the volunteer perform the activity, and giving feedback). On-the-job training can often mean not-planned-and-spontaneous if the supervisor happens to be observing the activity. Help to tighten up what is needed and how to give it. The workshop on Delegation would be a good partner training session to use with this one.
7. It would be helpful to find a professional trainer to share some key tips on adult education and training if your staff is expected to train volunteers. This would be a great episodic volunteer job.
8. The challenges to performing orientation and training are lengthy. You may want to pre-select the few that most apply to your organization and lead some problem-solving related to those. I would suggest that you pose the question and allow the group to do some of its own problem-solving, rather than give answers to these issues. There will be considerably more buy-in to dealing with issues if the group is engaged in finding new ways to diminish the barriers/challenges.
9. If participants know the basics of orientation and training, you may want to focus on Key Concept 3 which identifies barriers and challenges and works to resolve them.
10. Few programs actually evaluate their orientation/training programs, other than perhaps an initial response from volunteers about the actual training. You may want to focus on the importance of asking volunteers to give you feedback after they have been involved with the organization. Ask them what could be improved with orientation or training so that their entry and feeling of competence would be enhanced.



Suggested Resources on Orienting and Training Volunteers

Books

Lee, Jarene Frances with Julia M. Catagnus. *What I Learned (the Hard Way) about Supervising Volunteers*. Philadelphia: Energize, Inc., 1999. Order at <http://www.energizeinc.com/bookstore.html> .

Graff, Linda L. *Best of All: The Quick Reference Guide To Effective Volunteer Involvement*. Dundas, ON: Linda Graff & Associates, Inc., 2005. Order at <http://www.energizeinc.com/bookstore.html> .

McCurley, Steve and Rick Lynch. "Orientation and Training." Chapter 7 in *Volunteer Management: Mobilizing All the Resources in the Community*, 2nd ed. Kemptville, ON: Johnstone Training and Consultation, Inc., 2006. Order at <http://www.energizeinc.com/bookstore.html> .

Articles

Articles from e-Volunteerism can be found at <http://e-volunteerism.com> .

Amos, Donna and Tracy Johnstone. "The 'T' Word in Volunteer Management: A Creative Approach to Getting Volunteers into Training." *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. VI, Issue 1, October-December 2005.

Lam, Julia. "VQ Sustainable Training Scheme: "Volunteer Quotient towards Volunteer Quality." *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. IV, Issue 3, April-June 2004.

Mendez, Jana. "Training Paid Staff to Welcome Volunteers: The Boulder Co. Experience." *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. V, Issue 1, Oct.-Dec. 2004.

Web Sites

Online Orientation Example

from Sigma Theta Tau, Honor Society of Nursing

http://www.nursingsociety.org/VConnect/orientation_main.html

Example of Online Training

From MuniWireless: The Voice of Public Broadband

http://www.muniwireless.com/reports/docs/AWCP_training_guide.pdf

Resources on Orientation and Training

From Volunteer British Columbia

<http://www.vcn.bc.ca/volbc/resources/riskmanagement/riskorientation.html>

Generic Orientation Checklist Example

<http://www.charityvillage.com/cv/research/rvol34.html>



Handout 1

The 4 Key Concepts of Orientation and Training Volunteers

1. A volunteer's orientation to an organization/program should include information on its mission, fundamental values, systems and structure, history, future plans, and social community.
2. Training is the process of equipping volunteers with appropriate skills and knowledge to effectively carry out the work they have agreed to perform for the organization.
3. There are considerable challenges in orienting and training today's volunteers.
4. It is important to evaluate and improve your orientation and training program to continually keep it relevant and helpful.



Handout 2

Orientation Checklist and Questions

As a way to review and improve our orientation of volunteers, complete this check list for use at our seminar.

1. Topics in our orientation sessions	Yes	No	N/A	Needs to be improved	Don't know
History					
Welcome					
Mission/program					
Future goals/vision					
Philosophy of volunteer engagement					
Introduction to volunteer program					
Expectations/benefits of volunteering					
General policies/procedures					
Basic agency/facility info					
Staff and volunteers (organizational chart)					
Fundraising efforts					
Culture of agency					
Dress code, parking, etc.					
Liability coverage					
Training required					
Supervision system					
Handbook					
Confidentiality forms					



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Continued: Orienting Checklist and Questions

2. Who takes part (or should take part) in leading some aspect of the orientation?	Yes	No	Should take part	N/A
Executive Director				
Volunteer's Staff Supervisor				
Manager of Volunteer Resources				
Volunteers – Program/service				
Volunteers – Board members				
Clients				
Others				

3. Methods of presenting orientation (check all that apply)	Yes	No	Should Consider
In groups, scheduled regularly			
In groups, as needed			
One-on-one as volunteers start			
On-line information			
Written material (handbook)			
Distribute CDs			
Tour of facility			
Handbook			
Visit/observe			
Video			
Others			



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Continued: Orientation Checklist and Questions

4. What is the average time lapse between volunteer’s expressed interest and orientation?

Any ideas on how to shorten this time?

5. Who is given orientation to the organization/program/event?

- All volunteers, including short-term volunteers
- On-going volunteers
- Few or no volunteers

6. When is orientation information shared? (check all that apply)

- Prior to volunteer registering (part of general info during individual/group recruitment)
- Formal sessions held prior to volunteer commencing work at the organization
- Done as part of department/regional orientation – in addition to agency-wide orientation
- All or some of the above (explain) _____

As a result of filling out this questionnaire, some of my questions/recommendations regarding orientation at our organization/program are:



Handout 3

Volunteer Training

Potential Topics

Skills needed to perform the task/role

Knowledge and information needed

Attitudes needed for healthy and successful performance of the position

Major Styles of Sharing Information

Formal Training: Classroom style, lectures, discussions, field trips, scenario discussions, role-plays, case studies, etc.

Informal Coaching/Mentoring: Demonstration of the skill, observing as volunteer performs the skill, and giving feedback and additional support, if needed.



Handout 4

Volunteer Training Tips

- As information changes, make sure that current volunteers are given new information or additional skill.
- Record training that volunteers have completed, as well as any required special training or updated training.
- Develop a check list for monitoring the completion of all training required for a position to ensure that volunteers receive all needed training and, if appropriate, are tested and competent in those skills.
- Make use of online, distance-learning capability to enhance training (such as posting updated information sheets to a password-protected Web area) and to provide training more efficiently if volunteers work off-site or virtually.
- Always give volunteers written information (handouts) to reinforce learning/training and to keep for reference at a later time.
- Consider the specific training needs of volunteers. In large group training, it may be best to have times when the group divides up according to specific training needs necessary to carry out the positions.
- Some volunteers come with great skills but need extensive orientation so that they can carry out the work within your organizational structure and values.
- Involve volunteers in training other volunteers. It is a great way to give new opportunities to experienced volunteers and to acknowledge their accomplishments and capabilities.
- **Other training tips learned at seminar:**



Handout 5

Challenges and Issues of Orienting and Training Volunteers

1. Timing Issues:

- As we plan our orientation and training, how do we consider the fact that volunteers have limited time?
- How can we justify staff time involved in orientation/training?
- How do we adapt our orientation/training for short-term volunteers?
- What is the best timing for giving orientation information? (Before people register to volunteer, after they register and before they begin, gradually, as needed, etc.?)

2. How can we best orient and train volunteers who live at great distances from our physical buildings but who need to feel a part of our mission and motivated to carry out their work?

3. How can we deal with the varying skill levels of volunteers in our training program?

4. How can we know that volunteers have reported their skills and knowledge accurately?

5. After training, how can we be more confident that volunteers have the skills, knowledge, and attitudes to perform the work and fit into our culture?



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Continued: Challenges and Issues of Orientation/Training

6. What are some less time-consuming ways to deliver orientation/training electronically? Do we have volunteers who could help us design new online methods of sharing information?

7. How do we keep long-term volunteers refreshed on new skills and information required to carry out work?

8. How can we attract volunteers who are professional trainers who could teach training techniques to our staff?

9. How can we make our orientation/training more fun? More involving?

10. How can we create user-friendly handbooks for staff and volunteers?

11. How can we share our “culture” with new volunteers in our orientation sessions?

12. How do you make in-service training attractive to volunteers?



Handout 6

Evaluation of Orientation/Training

After Orientation Session(s)

Get immediate feedback from any orientation session, including such questions as:

1. Did we answer all questions you came with regarding volunteering with our organization?
2. Did we use your time efficiently?
3. Did you feel a welcoming atmosphere with our orientation?
4. Did the orientation make you question your interest in volunteering with our organization?
5. Please share any ways that we might improve our orientation session.

After Training/Coaching Session(s)

Get immediate feedback after specific training sessions, including such questions as:

1. Do you feel confident that the training has adequately prepared you for your work at our organization?
2. Are there any aspects of the training that you felt were weak or inadequate?
3. Was your time well used while being trained?
4. Did you have opportunities to test out new skills, if appropriate?
5. Please share any thoughts on how we might improve our training.

After Volunteer Has Been on the Job for a Designated Period

(Often the most helpful evaluations will come after the volunteer has an opportunity to carry out the work assigned. At that point, she/he will have an opportunity to determine how effective the orientation/training was.)

To evaluate orientation/training, here's a perfect question to ask volunteers on a regular basis:

“Is there anything you have experienced on the job that we have not adequately prepared you for?”



Participant Evaluation Form

Thank you for taking the time to share your evaluation of today's seminar. Your critique is valued and will be considered as we continually strive to improve our support to all personnel who team with volunteers.

1. Check the appropriate box to indicate whether you **met**, **partially met**, or **did not meet** the following learning objectives for this workshop:
 - a. Distinguish between volunteer orientation and volunteer training.
 met *partially met* *did not meet*
 - b. Know what should be included in orientation, how it can be delivered, and by whom.
 met *partially met* *did not meet*
 - c. Understand what is included in training, how to deliver it effectively to volunteers, and by whom.
 met *partially met* *did not meet*
 - d. Identify and respond to challenges in orienting and training today's volunteers.
 met *partially met* *did not meet*
 - e. Evaluate and improve their orientation and training so as to continually keep it relevant and useful.
 met *partially met* *did not meet*

Comments:

2. This session was:

- | | | |
|--------------|------------------------------|-----------------------------|
| Helpful: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Provocative: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Practical: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Well-paced: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too short: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too long: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |

Comments:



Training Busy Staff to Succeed with Volunteers:
The 55-Minute Training Series – Evaluation Form

Participant Evaluation Form (continued)

3. This trainer was:

- Knowledgeable: YES NO
Prepared: YES NO
Organized: YES NO
Enthusiastic: YES NO
Good discussion facilitator: YES NO

Comments:

4. In what ways can you utilize this material in your work?

5. What, if anything, do you plan to do differently as a result of this training?

6. What additional information on this or any other topic dealing with volunteers would be helpful to you in your work?

7. What suggestions do you have to strengthen this workshop?

8. Further comments or suggestions:

NAME (optional) _____

Training Busy Staff to Succeed with Volunteers: *The 55-Minute Training Series*

PowerPoint® Slides

To open the attached PowerPoint slides,
double-click the thumbtack icon below.



Trainer's Guide for Presenting...

Delegating to Volunteers

Betty Stallings

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Delegating to Volunteers

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Trainer's Guide for Presenting the *Delegating to Volunteers* Module

Introduction to Delegation

Most staff and leadership volunteers in nonprofit and public organizations are faced with a dilemma: They need and want to produce results that are often well beyond their individual capacities and time availability. And so they need to share work through delegating to volunteers.

Delegation is basically the accomplishment of the organization's mission and goals through the efforts of others. It is the supervisor's most important and basic tool. But, as all who are engaged in responsible delegation know, it is complicated, requires hard work, and involves unavoidable risks.

Unless we examine our attitudinal roadblocks toward delegation and learn some effective procedures and techniques, we will continue to experience the dramatic turnover and burnout in our service endeavors.

In many ways, delegation is the art of letting go while staying in charge. It involves giving volunteers the needed tools and support to do a job, clear responsibility and authority for decision making, and just enough controls to assure ourselves that the agreed-upon results are being accomplished. Not an easy task!

Good delegation frees individuals to do other work while empowering volunteers to grow on the job. An organization which is reluctant to release significant work to volunteers or is dissatisfied with volunteers' reliability and/or accomplishments may find that the core of the problem lies with difficulties inherent in delegation.

The **primary purposes** of this module are to:

- Explore the values of delegation.
- Enhance understanding of responsible delegation.
- Identify the procedures and techniques for doing it well.



Learning Objectives

Upon completion of this module, the participant will be able to:

1. Acknowledge any personal resistance to delegation.
2. Identify the values of responsible delegation.
3. Explain the differences between doing, directing, dumping, and delegating.
4. Name the key procedures and technical skills involved in delegation.
5. Propose appropriate levels of authority when delegating.

General Notes to Trainer

1. This workshop is in a suggested format. Feel free, however, to personalize it with your own stories. Also, phrase questions and activities in a manner most attuned to your organization.
2. This training should give participants useful skills in delegation that are transferable to any work or home setting.
3. Using examples of delegating tasks to children at home can often assist participants in quickly relating to the information about delegating at work.
4. Delegating is a core skill that will be useful for anyone who supervises paid or non-paid personnel and may, therefore, be a module to include early in a volunteer management training series.
5. If possible, involve other staff or leadership volunteers in the delivery of this module. Information is frequently best received when presented by a peer.
6. Because there are four key concepts to cover, presentations and facilitation must be crisp and timed. If participants want more information, use this as an opportunity to ask for future additional training time on the topic.
7. There are numerous resources on the subject of delegation but, if you wish to read one source to augment this training, I would recommend Chapter 7, "Delegating For Results," found in Rick Lynch's book, *Precision Management* (see Resources at the end of this module).



Presentation Overview

SLIDES/ HANDOUTS	SECTION	METHOD OF PRESENTATION	TIME
S-1 to 4	Introduction <ul style="list-style-type: none"> • Opening Exercise • Introductory Comments • Learning Objectives • 4 Key Concepts 	Activity/Presentation	10 minutes
H-1			
S-5 to 10	Key Concept 1 Three reasons for difficulties in delegation	Interactive Presentation	15 minutes
H-2			
S-11 to 12	Key Concept 2 Benefits of Delegation	Discussion	5 minutes
S-13 to 16	Key Concept 3 Cardinal Rules of Delegation	Interactive Presentation	10 minutes
H-2			
S-17 to 22	Key Concept 4 Level of authority in delegation	Interactive Presentation	12 minutes
H-3			
S-23 to 24	Summary/Wrap-up/ Evaluation	Summary Remarks	3 minutes
H-4			Total: 55 Minutes



Presentation Script

SLIDE/ HANDOUT	SECTION	TIME
S-1: My Success at Delegation	<p>INTRODUCTION</p> <p>Quick opening exercise (optional):</p> <ul style="list-style-type: none"> • Ask all participants to share (confess) to another workshop participant how they perceive their success at delegating to others – and the descriptive word they chose must begin with an “M,” such as magnificent, mixed, miserable, murky, etc. • Debrief: Ask by a show of hands how many rated themselves as magnificent, mixed, etc., and ask for any new “M” words that surfaced. <p>Summary of Learning: <i>Most people are, at best, mixed in their self-evaluation of success with delegation. Note that it is a difficult skill that involves hard work, patience, and unavoidable risks.</i></p>	10 minutes ▼
S-2: Learning Objectives S-3 to 4: Key Concepts H-1: Key Concepts	<p>LEARNING OBJECTIVES</p> <p>Share/distribute learning objectives and explain that this in-service training session is built on 4 Key Concepts. (Show the slides with the concepts. Indicate that during the workshop each concept will be examined, together with relevant material.)</p>	
S-5: Key Concept 1	<p>Key Concept 1</p> <p>Many difficulties in delegation arise from:</p> <ul style="list-style-type: none"> • attitudes toward releasing work • not understanding what delegation is • lack of organizational rewards for effective delegation 	15 minutes ▼
S-6 to 7: Attitudes	<p>Present/discuss the following three points:</p> <p>Point 1: <i>Although we like others to delegate to us, may of us have some resistance to delegating to others.</i></p>	



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SLIDE/ HANDOUT	SECTION	TIME
S-6 to 7: Attitudes (continued)	<p>Ask group to answer: <i>Why do people have difficulty delegating?</i> (Record answers on flip chart/transparency – optional.) Suggest these as possible reasons if the group does not suggest them:</p> <ul style="list-style-type: none"> • "I can do it better." • "I enjoy it and don't want to give it up." • "I have no time to delegate." • "People will wonder what I do." • "The volunteer may do it better than I do." • "I am responsible for the end results and don't want to lose control by 'farming' it out." • "I am a perfectionist and have had poor past experience with delegation." 	▲ (same 15 minutes)
	<p>Key Learning: <i>If we continue to allow these attitudes to affect our willingness to delegate, we will never become good managers. GOOD MANAGERS don't directly do things; they work through others (delegate) to get the job done.</i></p>	
S-8: Understanding Delegation	<p>Point 2: <i>There is much misunderstanding regarding what delegation is. There are four ways to get a job done:</i></p> <ul style="list-style-type: none"> Doing it all Directing others (when, how, etc.) Dumping (indiscriminate, poor timing) Delegating (mutual results, authority/support inspection system) 	
S-9: Understanding Delegation H-2: Definition	<p>Show S-11, H-2, which breaks apart the definition of delegation. Participants should begin to see the complexity of this skill. Assure them you will explore in detail these elements which are essential to good delegation.</p>	
	<p>Key Learning: <i>Your past experience with delegation may not have included an understanding of all the elements involved.</i></p>	
S-10: Organizational Rewards	<p>Point 3: <i>If delegation is not rewarded in an organization, people tend to want to do it all!</i></p> <p>Optional discussion, if pertinent in your organization: Who tends to get rewarded in our organization – people who are the doers and/or people who delegate?</p>	



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SLIDE/ HANDOUT	SECTION	TIME
	<p>Key Learning: <i>If the organization tends to reward and honor only people who do the most, effective delegation may not be regarded as a valued quality.</i></p>	<p>▲ (same 15 minutes)</p>
S-11: Key Concept 2	<p>Key Concept 2 It is important to understand and appreciate the potential benefits of delegation for you, for the volunteer, and for the organization.</p>	<p>5 minutes ▼</p>
S-12: Benefits of Delegation	<p>Ask group to answer: <i>What are the benefits for you, the organization, and volunteers when you delegate?</i> Facilitate and/or record answers. Possible answers:</p> <ul style="list-style-type: none"> • Release time for you to do other things. • The organization receives valuable services and can do more. • You involve more people in achieving the mission. • This is the way we "grow" people. <p>(You might ask participants to imagine where they would be today if no one had taken the risk to delegate to them.)</p>	
S-13 Key Concept 3 H-2: Cardinal Rules of Delegation	<p>Key Concept 3 Understanding and practicing the cardinal rules of effective delegation enhance your chance of success.</p>	<p>10 minutes ▼</p>
S-14 to 16: Cardinal Rules	<p>There are nine cardinal rules of effective delegation: (Use example of an activity delegated to a volunteer in your organization as you share these key rules.)</p> <p>1. You must assess work requirements with the corresponding abilities and time availability of a volunteer. In other words, do you have the right person for the assignment, not simply someone who has agreed to do it? Does he/she have the time and is he/she willing to give the time needed to get the job done?</p> <p>2. Give the assignment in terms of results. Don't just list activities for volunteers to do; share with them what will be accomplished as a result of their work.</p>	



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SLIDE/ HANDOUT	SECTION	TIME
<p><i>(continued)</i> S-14 to 16: Cardinal Rules</p>	<p>3. Define the level of control. Indicate how much authority the volunteer has to make decisions without "checking in." (Note that this is a critical part of success which will be dealt with further in Key Concept 4.)</p>	<p style="text-align: center;">▲</p> <p style="text-align: center;">(same 10 minutes)</p>
	<p>4. Communicate any guidelines and assess the volunteer's understanding of them. Volunteers should be forewarned about any constraints that must shape their decisions or activities (e.g., confidentiality).</p>	
	<p>5. Make resources and training available. It is important that volunteers have the assistance and resources needed to successfully accomplish their tasks. Ask volunteers what you can do to help assure their success.</p>	
	<p>6. Determine criteria for success. It is important that the supervisor and the volunteer reach an agreement on how results will be measured (e.g., results of a recruitment outreach: recruit and train six new counselors for our program by June 1).</p>	
	<p>7. Set up checkpoints. To be certain that the work is progressing, times should be established to check in on progress or on any need for change or additional support.</p>	
	<p>8. Provide feedback and recognition along the way and at the completion of a project. People appreciate knowing they are on track and are being noticed for good progress or, if needed, given additional resources to be successful.</p>	
	<p>9. Watch out for REVERSE DELEGATION. Ask participants what reverse delegation is. If they are unsure, give them an example: <i>When you delegate a task to a volunteer and he/she brings problems back to you to solve!</i> If this occurs, you need to help them solve the problem, but be sure to let them keep responsibility and do the task. (Most people can share experiences with this sort of behavior.)</p>	



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SLIDE/ HANDOUT	SECTION	TIME
S-17: Key Concept 4	<p align="center">Key Concept 4</p> <p>The key to effective delegation often lies in deciding on the proper level of authority and control to release when delegating a job or task to someone.</p> <hr/> <p>Presentation: Most problems in delegation lie in either <i>over-</i>controlling (watching over the shoulder) or <i>under-</i>controlling (Here it is ... Good luck!) The important thing to know is what level of control the volunteer needs to have in the task given to him/her.</p>	12 minutes ▼
S-18: Levels of Control H-3: Levels of Control	<p>There are essentially four major levels to choose from: (First introduce all the levels on S-21, H-3 and then give fuller descriptions and illustrations from Level #4 moving up to Level #1, described below.)</p>	
S-19: Level #4	<p>Level #4 - No authority for generating own work assignments. This is really not delegation. The volunteer would not be permitted to make any decisions on the project. Only the very immature or unqualified would fit in this category. You don't want to put people into jobs for which they have no qualifications or motivation to succeed.</p>	
S-20: Level #3	<p>Level #3 - Authority to recommend own work assignments. Volunteers have the authority to recommend what ought to be done - the lowest level of authority. They must bring suggestions to you for your approval before they can move ahead. Ask the participants: <i>Under what circumstances would this level of delegation be quite appropriate?</i> Possible correct answers:</p> <ul style="list-style-type: none"> • New volunteers for whom you have no record of reliability or ability. (If they prove to have good ideas, move them quickly to Level #2.) • Volunteers who are inexperienced in this activity. They might function at Level #2 or even Level #1 in other activities. (Example: Volunteers whom you would like to train as volunteer recruiters. They are inexperienced at this, so you would ask them to give you an outline of their talk and, if inexperienced at public speaking, you would give them an opportunity to rehearse.) 	



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SLIDE/ HANDOUT	SECTION	TIME
S-21: Level #2	<p>Level #2 - Authority to recommend own work assignments, provided regular progress reports are received. This authority is given to a volunteer who has proved him/herself capable in this area. You trust his/her judgment to make decisions without always coming to you for approval. You do ask for a report indicating actions they have taken so that you maintain control. If the person repeatedly makes poor decisions, return them to Level #3 in delegation.</p>	<p>▲ (same 12 minutes)</p>
S-22: Level #1	<p>Level #1 - The authority to recommend own work assignments with minimal oversight. This is the highest level of delegation, where you have full trust in a person's competence and commitment to a task or job. Other than periodic status reports, you ask for contact with the volunteer only if he/she has a problem or if there are circumstances for which you need to be apprised.</p> <p>(To augment understanding of Key Concept 4) A great example to help people understand these levels of delegation is to discuss a parent's supervision of a teenager as the parent gradually "lets go." Level #4 - "You will be home at midnight." No discussion. Level #3 - "What time do you think is reasonable for you to be home?" Level #2 - "Wake me up to let me know you got home safely." Level #1 - NEXT DAY: "So. How's it going?"</p>	
S-23: Review S-24: Remember H-4: Participant Evaluation Form	<p>Summary/Wrap-up/Evaluation</p> <p>Review definition of delegation. Delegation isn't easy, is often complicated, and involves taking a risk.</p> <p>BUT REMEMBER: <i>You can let go while staying in control if you follow the essential principles of delegation and examine any attitudes that stand in the way of effective delegation.</i></p> <p>Distribute Participant Evaluation forms.</p> <p>End 55-Minute Training.</p>	<p>3 minutes ▼</p>



“Thumbnail” View of Slides

Training Busy Staff
to Succeed with Volunteers:
The 55-Minute Training Series

Delegating to Volunteers

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My Success at Delegation

M...

- ▶ Magnificent
- ▶ Mixed
- ▶ Miserable
- ▶ Murky
- ▶ More...

Most people are, at best, mixed in their self-evaluation of success with delegation. It's a difficult skill that involves hard work, patience, and unavoidable risks.

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Learning Objectives

- ▶ To acknowledge any personal resistance to delegation.
- ▶ To identify the values of responsible delegation.
- ▶ To explain the differences between doing, directing, dumping, and delegating.
- ▶ To name the procedures and technical skills of delegation.
- ▶ To propose appropriate levels of authority when delegating.

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4 Key Concepts

1. Many difficulties in delegation arise from attitudes toward releasing work, not understanding what delegation is, and lack of organizational rewards for effective delegation.
2. It is important to understand and appreciate the potential benefits of delegation for you, for the volunteer, and for the organization.

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4 Key Concepts

3. Understanding and practicing the cardinal rules of effective delegation enhance your chance of success.
4. The key to effective delegation often lies in deciding on the proper level of authority and control to release when delegating a job or task to someone.

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Key Concept 1

- ▶ Many difficulties in delegation arise from:
 - Attitudes toward releasing work
 - Not understanding what delegation is
 - Lack of organizational rewards for effective delegation

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Attitudes

- ▶ Although we like others to delegate to us, many of us have some resistance to delegating to others.

Activity

- ▶ Why do people have difficulty delegating?

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Attitudes

- ▶ If we continue to allow these attitudes to affect our willingness to delegate, we will never become good managers.
- ▶ Good managers don't do things directly; **they work through others (delegate) to get the job done.**

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Understanding Delegation

- ▶ Many misunderstand what delegation is:
 - Assigning mutually agreed-upon results.
 - Giving an appropriate level of authority.
 - Offering needed support and training.
 - A follow-up system to allow you to inspect what you expect.

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Understanding Delegation

There are four ways to get a job done:

- ▶ Doing it all
- ▶ Directing others
- ▶ Dumping
- ▶ Delegating

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Organizational Rewards

- ▶ If delegation is not rewarded in an organization, people tend to want to do it all!
- ▶ If the organization tends to reward and honor only people who do the most, effective delegation may not be regarded as a valued quality.

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Key Concept 2

- ▶ It is important to understand and appreciate the potential benefits of delegation for you, for the volunteer, and for the organization.

Activity

What are the benefits for you, the organization, and volunteers when you delegate?

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“Thumbnail” View of Slides (continued)

Benefits of Delegation

- ▶ Releases time for you to do other things.
- ▶ The organization receives valuable services and can do more.
- ▶ You involve more people in achieving the mission.
- ▶ This is the way we “grow” people.

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Key Concept 3

- ▶ Understanding and practicing the 9 Cardinal Rules of Effective Delegation enhance your chance of success.

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Cardinal Rules of Delegation

- ▶ Assess the work requirements and the corresponding abilities/time availability of the volunteer.
- ▶ Give assignment in terms of results, not just activities.
- ▶ Define the level of control/authority in the position.

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Cardinal Rules of Delegation

- ▶ Communicate any guidelines and assess the volunteer’s understanding of them.
- ▶ Make resources and training available.
- ▶ Determine criteria for success (how results will be measured).

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Cardinal Rules of Delegation

- ▶ Set up checkpoints, deadlines, and systems for reporting.
- ▶ Provide feedback and recognition (along the way and at the end).
- ▶ Watch out for reverse delegation!

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Key Concept 4

- ▶ The key to effective delegation often lies in deciding on the proper level of authority and control to release when delegating a job or task to someone.
- ▶ Most problems in delegation lie in either *over-controlling* or *under-controlling*.

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Levels of Control

Level #4:
No authority to recommend or generate own assignments.

Level #3:
The authority to recommend own assignments.

Level #2:
The authority to recommend own assignments, provided regular progress reports are received.

Level #1:
The authority to recommend and carry out own assignments with minimal oversight.

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Level #4:
No authority to recommend or generate own assignments.

- ▶ Not really delegation.
- ▶ Volunteer not permitted to make any decisions.
- ▶ Mainly for the immature or unqualified.

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Level #3:
The authority to recommend own assignments.

- ▶ The most basic level of authority.
- ▶ Volunteer must bring suggestions to you for approval before moving ahead.
- ▶ When leadership changes, staff and volunteers may be shifted back to this level until mutual trust is established.

Under what circumstances would this level of delegation be quite appropriate?

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Level #2:
The authority to recommend own assignments, provided regular progress reports are received.

- ▶ Given to volunteers who have proven themselves capable in this area.
- ▶ You trust their judgment to make independent decisions.
- ▶ You do ask for a report so that you maintain control.

[If the volunteer repeatedly makes poor decisions, return him or her to Level #3.]

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Level #1:
The authority to recommend and carry out own assignments with minimal oversight.

- ▶ The highest level of delegation.
- ▶ When you have full trust in a volunteer’s competence and commitment to a task or position.
- ▶ Other than periodic status reports, the volunteer asks for contact only if there’s a problem or if you need to be apprised of something.

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To Review...

- ▶ Effective delegation involves:
 - Assigning mutually agreed-upon results.
 - Giving an appropriate level of authority.
 - Offering needed support and training.
 - A follow-up system to allow you to inspect what you expect.

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“Thumbnail” View of Slides (continued)

Remember...

- ▶ Delegation isn't easy, is often complicated, and involves taking a risk.
- ▶ *You can let go while staying in control if you follow the essential principles of delegation and examine any attitudes that stand in the way of effective delegation.*

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Suggestions for Expanded Activities for Sessions over 55 Minutes:

1. Have participants think about what parts of their current job they could delegate to a volunteer. (A good follow-up workshop would be the module on volunteer work design in which you teach staff and volunteers to write new position descriptions for others based on the release of some of their current tasks.)
2. After the presentation on Levels of Authority (Key Concept 4), have participants think about a situation where they put someone in the wrong level of authority (too high or too low) and had difficulties supervising the person.
3. When a new manager or supervisor enters the organization, problems are likely to occur with the levels of authority delegated by his or her predecessor, particularly if people have progressed to a trusted level with the former manager. When a new manager enters, staff are often placed in a lower level while the manager assesses their working style and develops some trust in their relationship. This may be an appropriate topic to add if your organization has recently undergone personnel changes at the management level.
4. In groups of three, ask participants to role-play a meeting where an assignment is given to the volunteer. Have one person take the role of the staff person who is delegating something to the volunteer. The third person is the observer who will give feedback as to the delegator's effectiveness in releasing the task. Use examples relevant to your organization regarding the position (see Key Concept 3 to review elements).
5. Ask people to think of a person in their own life who has significantly and effectively delegated to them. Ask them to remember the qualities of the person and why they regard her or him as a superb delegator. (Remembering people who took the risk to trust *you* will help you become better able to "let go.")
6. A good closing exercise is to ask participants to get in dyads and answer the question: *As a result of our discussion on delegation, what will I begin to do differently to enhance my skills in this area?*



Suggested Resources on Delegation

Books and Articles

- Blair, Gerard M., "The Art of Delegation." Online at <http://www.see.ed.ac.uk/~gerard/Management/art5.html> .
- Finch, Llody C. and Robert B. Madux. *Delegation Skills For Leaders: Action Plan for Success as a Manager*. Crisp 50-Minute Series, 2005. Order on <http://amazon.com> .
- Genett, Donna M., Ph.D. *If You Want It Done Right, You Don't Have To Do It Yourself*. Quill Driver Books/Word Dancer Press, August 2003.
- Lynch, Rick. *Precision Management: How to Build and Lead the Winning Organization*. Abbot Press, 1988.
- Rierdan, Richard "The Fine Art of Delegation." *The Graziadio Business Report*. Pepperdine University, 2001. Online at <http://gbr.pepperdine.edu/013/delegate.html> .

Web Sites

- "Delegation" at *Businessballs.com*
<http://www.businessballs.com/delegation.htm>
- "7 Top Tips For Effective Delegation: Skills Towards Work-Life Balance" at
Management for the Rest of Us
<http://www.mftrou.com/effective-delegation.html>
- Delegation - Getting the Help You Need, When You Need It at
Stress Management from Mind Tools*
<http://www.mindtools.com/stress/WorkOverload/Delegation.htm>



Handout 1

The 4 Key Concepts of Delegating to Volunteers

1. Many difficulties in delegation arise from:
 - attitudes towards releasing work
 - not understanding what delegation is
 - a lack of organizational rewards for effective delegation

2. It is important to understand and appreciate the potential benefits of delegation for you, for the volunteer, and for the organization.

3. Understanding and practicing the cardinal rules of effective delegation enhance your chance of success.

4. The key to effective delegation often lies in deciding on the proper level of authority and control to release when delegating a role or task to someone.



Handout 2

Delegation: Definition and Cardinal Rules

The Definition of *Delegation*:

Assigning mutually agreed upon results, an appropriate means of authority and support to get those results, and a follow-up system which allows you to **inspect** what you **expect**.

The Nine Cardinal Rules of Delegating to Volunteers:

1. Prior to delegation, you must assess the work assignment, the corresponding abilities, and other work and personal priorities of the volunteer.
2. Give the assignment in terms of results.
3. Define the level of control.
4. Communicate any guidelines.
5. Make resources available.
6. Determine criteria for success.
7. Set up checkpoints.
8. Provide feedback and recognition along the way and at the completion of the project.
9. Watch out for “Reverse Delegation.”



Handout 3

Levels of Control in Delegation*

Level #4:

No authority to recommend or generate own assignments.

- Not really delegation, but rather direction.
- The volunteer is not permitted to make any decisions on the project. All are made by the supervisor.

Level #3:

The authority to recommend own assignments.

- The most basic level of authority.
- Volunteer must bring suggestions forward for approval before moving ahead.
- Often when leadership changes within an organization, staff/volunteers are shifted to this level until a mutual trust in the working relationship is established.

Level #2:

The authority to recommend own assignments, provided regular progress reports are received.

- Given to volunteers who are trusted to make some independent decisions.
- You do ask for a report of what actions are taken in order to maintain control.

Level #1:

The authority to recommend and carry out own assignments with minimal oversight.

- Given when you have complete trust in the volunteer's competence and commitment to a task or position.
- You ask for contact only if the volunteer has a problem or feels you need to be apprised of the situation.

* Derived from concepts in *Precision Management: How to Build and Lead the Winning Organization* by Rick Lynch.



Participant Evaluation Form

Thank you for taking the time to share your evaluation of today's seminar. Your critique is valued and will be considered as we continually strive to improve our support to all personnel who team with volunteers.

1. Check the appropriate box to indicate whether you **met**, **partially met**, or **did not meet** the following learning objectives for this workshop:
 - a. Discuss any resistance to delegation.
 met *partially met* *did not meet*
 - b. Appraise the values of responsible delegation.
 met *partially met* *did not meet*
 - c. Explain the differences between doing, directing, dumping, and delegating.
 met *partially met* *did not meet*
 - d. Name the procedures and technical skills involved in delegation.
 met *partially met* *did not meet*
 - e. Propose appropriate levels of authority in a variety of delegation situations
 met *partially met* *did not meet*

Comments:

2. This session was:

- | | | |
|--------------|------------------------------|-----------------------------|
| Helpful: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Provocative: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Practical: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Well-paced: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too short: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too long: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |

Comments:



Training Busy Staff to Succeed with Volunteers: *The 55-Minute Training Series- Evaluation Form*

Participant Evaluation Form (continued)

3. This trainer was:

- Knowledgeable: YES NO
- Prepared: YES NO
- Organized: YES NO
- Enthusiastic: YES NO
- Good discussion facilitator: YES NO

Comments:

4. In what ways can you utilize this material in your work?

5. What, if anything, do you plan to do differently as a result of this training?

6. What additional information on this or any other topic dealing with volunteers would be helpful to you in your work?

7. What suggestions do you have to strengthen this workshop?

8. Further comments or suggestions:

NAME (optional) _____

Training Busy Staff to Succeed with Volunteers: *The 55-Minute Training Series*

PowerPoint® Slides

*To open the attached PowerPoint slides,
double-click the thumbtack icon below.*



Trainer's Guide for Presenting...

Mutual Performance Reviews

Betty Stallings

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Mutual Performance Reviews

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Trainer's Guide for Presenting the *Mutual Performance Reviews* Module

Introduction to Mutual Performance Reviews

Suggesting that an organization initiate performance reviews of volunteers is frequently met with tremendous resistance. You may hear responses such as:

- "We're getting too formal."
- "Volunteers will be scared off."
- "We don't have the time or skills to perform such reviews."
- "How could we ever initiate this with our current volunteers?"

A growing number of volunteer program leaders are countering these perceptions, choosing instead to see performance review as a reflection of the importance of volunteers in an organization. It is a mutual way to express appreciation, identify problems and needs, determine the volunteer's future involvement in the organization, and hold the volunteer and the organization accountable for their commitment to one another.

Increasing numbers of volunteers are seeking to develop and enhance their skills through volunteering and welcome opportunities to receive constructive feedback and evaluation of their work. Organizations that attempt to maximize volunteer participation see a mutual assessment as a time to look at what additional support the organization needs to offer volunteers to ensure success.

Prior to establishing formal performance assessment procedures for volunteers, the organization's staff should be evaluated in a similar process. Initiating a volunteer performance review system should be gradual and sensitive to the concerns and issues of existing staff and volunteers. Often, the development of a self-assessment tool is the first step toward having volunteers begin to take a critical look at their accomplishments. Stressing the mutuality of the experience may be most poignantly noted by remembering that volunteers constantly "fire" organizations when they are not satisfied. Both the organization and the volunteer will have concrete information to use to evaluate the success of this partnership if they have clear success measures for each volunteer position, as well as the support and training for the volunteer by the organization.

Learning Objectives

- The **primary purpose** of this module is to introduce or enhance an organization's mutual reviews of volunteer performance.



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Upon completion of this module, the participant will be able to:

1. Define a mutual performance review process for volunteers that fits into the total supervision and support system of the organization.
2. Identify the purposes, benefits and barriers of instituting or enhancing a mutual performance review process.
3. Suggest procedures and tools for performing the reviews.
4. Target potential outcomes of mutual performance reviews of volunteers.

General Notes to Trainer

1. This workshop is in a suggested format. Feel free, however, to personalize it with your own stories. Also, phrase questions and activities in a manner most attuned to your organization.
2. Note that the subject here is *individual performance assessment*, not overall volunteer program evaluation. Program evaluation is covered in another module.
3. This workshop should be presented only if the organization's salaried staff have a performance review process.
4. Be prepared to experience resistance on this topic. It is still controversial, but more professional volunteer managers are discovering the positive impact that performance reviews have on the volunteers and the organization when they are performed mutually and effectively.
5. This workshop deals with both attitudes towards evaluation and a process to apply it to the volunteer program. You will need to judge whether the entire workshop will be possible to deliver effectively in the allotted time frame. Suggestions for breaking it into several sessions are given in this module under "Suggestions for Expanded Activities for Sessions over 55 Minutes."
6. This workshop may generate ideas for improving the agency's overall performance review system. This may be frustrating to participants unless their concerns are heard. You may wish to avoid these distractions by making it very clear at the outset of the presentation that the discussion will be focused solely on assessing the performance of volunteers.
7. Examples of forms that can be adapted for use in mutual evaluations are listed in the Resources section at the end of this module.



Presentation Overview

SLIDES/ HANDOUTS	SECTION	METHOD OF PRESENTATION	TIME
S-1 to 3	Introduction <ul style="list-style-type: none"> • Activity • Introduction • Learning Objectives • Key Concepts 	Presentation/ Group Interaction	10 minutes
H-1			
S-4 to 7	Key Concept 1 Definition of Volunteer Performance Review	Presentation/Individual Response	8 minutes
H-2			
S-8 to 11	Key Concept 2 Benefits/Barriers	Interactive Presentation	12 minutes
H-3			
S-12 to 15	Key Concept 3 Process of Performance Review	Presentation	8 minutes
H-4, H-5, H-6			
S-16 to 20	Key Concept 4 Outcomes of Performance Reviews	Presentation	15 minutes
H-7			
S-21	Summary/Wrap-up/ Evaluation	Summary Presentation	2 minutes
H-8			Total: 55 Minutes



Presentation Script

SLIDE/ HANDOUT	SECTION	TIME
S-1: Introduction	<p>Introduce the topic with the following activity: For two minutes have participants share any words that come to mind when they hear/see the word: evaluation. You may wish to record these on a flip chart.</p> <p>Anticipated reaction Generally, there will be an overwhelmingly negative reaction to the word (e.g., powerless, adversarial, boss, school, uncomfortable). Occasionally, more positive words will suggest growth, challenge, affirmation.</p> <p>Debrief People frequently have had negative experiences with evaluation in their life; it was one-sided and frequently negative. Ask participants to open their minds to a new view of performance evaluation/review which is intended to be an affirming, mutual, sharing event and not one to be feared, ignored, or avoided.</p>	10 minutes ▼
S-2: Learning Objectives	<p>Give a few introductory comments on performance review and share the Learning Objectives of this session. (At the conclusion of the seminar, participants can evaluate if they felt these objectives were met.)</p>	
S-3: 4 Key Concepts H-1: 4 Key Concepts	<p>This workshop is built on 4 Key Concepts. Share and indicate that each concept will be covered in the seminar.</p>	
S-4: Key Concept 1	<p>Key Concept 1</p> <p>Successful performance reviews provide a periodic opportunity for communication between a person who assigns work and the person who performs it. They discuss what they expect from themselves and each other and how well those expectations are being met.</p>	8 minutes ▼
S-5: Performance Review	<p>Presentation: Performance reviews should be non-threatening, constructive, supportive, flexible, and empowering. They should aim to encourage the volunteer to stretch for high standards and determine how the organization can help the volunteer achieve his/her goals.</p>	



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SLIDE/ HANDOUT	SECTION	TIME
<p>S-6 to 7: Essential Elements H-2: Mutual Performance Reviews</p>	<p>Essential elements for success:</p> <ul style="list-style-type: none"> • As they enter the organization, volunteers should be apprised of the feedback system, including the system of mutual performance review. • Mutuality is the key. It is a time for both the volunteer and the supervisor to share their experience with one another in the organization. • Performance review should be based on previously agreed-upon standards, position descriptions, tasks, deadlines, available resources, intervening circumstances, etc. • The performance review should have no surprises if ongoing supervision and conflict resolution have taken place. • Depending on the size and culture of the organization, the process can be formal with special documents or done in a more informal session. • It is best to gradually include current volunteers who have not previously been reviewed. Self-assessment may work best as the system is initiated. • Schedule performance review for a specific time or it will be put off. <p>Ask participants if they have any points of clarification before going on to Key Concept 2.</p>	<p style="text-align: center;">▲</p> <p style="text-align: center;">(same 8 minutes)</p>
<p>S-8: Key Concept 2</p>	<p style="text-align: center;">Key Concept 2</p> <p>There are numerous benefits to volunteers and organizations when volunteer performance reviews are incorporated into the volunteer management system.</p>	<p style="text-align: center;">12 minutes</p> <p style="text-align: center;">▼</p>
<p>S-9 to 10: Benefits of Performance Reviews H-3: Benefits of Performance Review</p>	<p>Ask participants to share what they see as benefits for the agency and for the volunteer to be involved in mutual performance reviews. (Add from the slide any that they fail to mention.)</p> <ul style="list-style-type: none"> • Strong statement that volunteers are important and that both volunteers and the organization are held accountable to their agreements. • Volunteers want to be successful and respond well to feedback. • It is a good time to express appreciation for volunteer efforts and acknowledge accomplishments. Some have chosen to call the sessions “valuation feedback.” • Enables volunteers and the organization to re-negotiate their working agreement with one another for the next time period. 	



Training Busy Staff to Succeed with Volunteers:
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SLIDE/ HANDOUT	SECTION	TIME						
<p><i>(continued)</i> S-9 to 10: Benefits of Performance Reviews H-3: Benefits</p>	<p><i>(continued)</i></p> <ul style="list-style-type: none"> • It provides an opportunity for plans to be made to improve volunteer performance in the future (e.g., training, new placement). • Allows volunteers to express concerns and "escape" an unfavorable situation. • Allows staff to share concerns and "dismiss" a volunteer if the situation requires that action. 	<p>▲ (same 12 minutes)</p>						
<p>S-11: Barriers to Performance Reviews</p>	<p>Optional Activity: If participants express resistance to utilizing volunteer performance reviews, problem-solve to assist them in breaking through their barriers. Ask participants: <i>"What are some potential barriers our organization will need to overcome to do performance reviews successfully?"</i></p>							
	<table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th data-bbox="513 846 881 898" style="text-align: left;">Barriers</th> <th data-bbox="881 846 1276 898" style="text-align: left;">Strategies to Overcome</th> </tr> </thead> <tbody> <tr> <td data-bbox="513 898 881 989">Our staff isn't reviewed</td> <td data-bbox="881 898 1276 989">Suggest this be initiated first</td> </tr> <tr> <td data-bbox="513 989 881 1115">No policies on reviews for volunteers</td> <td data-bbox="881 989 1276 1115">Institute policies on performance reviews and dismissal</td> </tr> <tr> <td data-bbox="513 1115 881 1283">Current volunteers are resisting the idea</td> <td data-bbox="881 1115 1276 1283">Involve them in developing the form and process and make it a mutual experience</td> </tr> </tbody> </table>		Barriers	Strategies to Overcome	Our staff isn't reviewed	Suggest this be initiated first	No policies on reviews for volunteers	Institute policies on performance reviews and dismissal
Barriers	Strategies to Overcome							
Our staff isn't reviewed	Suggest this be initiated first							
No policies on reviews for volunteers	Institute policies on performance reviews and dismissal							
Current volunteers are resisting the idea	Involve them in developing the form and process and make it a mutual experience							
<p>S-12 Key Concept 3</p>	<p>Key Concept 3 At the heart of a good volunteer performance review is a clear delineation of volunteer job responsibilities and success indicators, and a discussion of factors contributing to the outcomes of the volunteer's time.</p>	<p>8 minutes ▼</p>						
<p>H-4: Volunteer Performance Reviews - Process S-13: Before the Session</p>	<p>Review the following process for mutual performance reviews. Before the Session:</p> <ol style="list-style-type: none"> 1. Have the volunteer fill out a self-assessment form (including their assessment of the support the organization has given them). 2. Review the volunteer's position description, goals, and standards; evaluate performance versus expectation. 3. Write (or take notes concerning) an evaluation on the position expectation versus performance. 							



Training Busy Staff to Succeed with Volunteers:
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SLIDE/ HANDOUT	SECTION	TIME
S-14: During the Session	<p>During the Session:</p> <ol style="list-style-type: none"> 1. Together, review the agreed-upon position expectations. 2. Share positive feedback and give appreciation for service. 3. Volunteer shares self-assessment and assessment of agency support. 4. Supervisor gives assessment of volunteer's performance. 5. Discuss any barriers that volunteer experienced in carrying out the position. 6. Discuss future plans for the volunteer in the organization (higher positions, goals, etc.). 	<p>▲ (same 8 minutes)</p>
S-15: After the Session H-5, H-6 (Performance Review Forms)	<p>After the Session:</p> <ol style="list-style-type: none"> 1. Write a report for file (if appropriate). 2. Follow up on any action plans or agreements made by the organization or volunteer. <p>If applicable, use H-5 and H-6 to explore possible forms/questions to utilize in or adapt to your volunteer program.</p>	
S-16: Key Concept 4	<p>Key Concept 4</p> <p>Outcomes from volunteer performance reviews can range from "applause" to dismissal - by the organization or by the volunteer.</p>	<p>15 minutes ▼</p>
S-17: Keeping Volunteers Involved	<p>Presentation:</p> <p>One way to keep volunteers continually involved in your organization is to take the opportunity of performance reviews to discuss a volunteer's readiness for new challenges, need for a change or break, etc. If there has been low productivity or morale on the part of the volunteer, it is important to discuss remedies.</p>	
S-18 to 19 Low Volunteer Productivity/ Morale H-7: Low Volunteer Productivity	<p>Activity to uncover productivity or morale problems:</p> <p>Ask group to share possible reasons for low volunteer productivity or morale. The following are examples:</p> <ul style="list-style-type: none"> • Boredom; too much routine • Discontent; personality differences • Idleness: fluctuating workload, insufficient staff • Lack of interest in the work • Ill-defined assignments • Inadequate supervision/training • Misunderstanding of policies and their purposes • Resentment, overload, or unrealistic deadlines • Poor communication within work team (staff and volunteers) 	



Training Busy Staff to Succeed with Volunteers:
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SLIDE/ HANDOUT	SECTION	TIME
<p><i>(continued)</i> S-18 to 19 Low Volunteer Productivity/ Morale H-7</p>	<p><i>(continued)</i></p> <ul style="list-style-type: none"> • Emotional stress and personal difficulties • Erratic participation • Lack of appreciation • Staff and organizational changes • Staff resistance to utilizing volunteers <p>Activity tailored to your organization: Ask participants to discuss any additional reasons they have experienced and then divide them into small groups to discuss remedies, particularly identifying any productivity problems that have occurred within your organization.</p>	<p>▲ (same 15 minutes)</p>
<p>S-20: Dismissal</p>	<p>Comment on Dismissal: Remember: It may be initiated by the organization or by <i>the volunteer</i>.</p> <ul style="list-style-type: none"> • The volunteer may choose to leave the organization for any number of reasons. • The organization may dismiss volunteers due to non-adherence to rules and procedures of the organization, or due to continued unsatisfactory performance after progressive warnings have taken place. <p>Share/review your organization's policies and procedures regarding dismissal, initiated by the organization or the volunteer, such as exit interviews, dismissal procedures, etc.</p>	
<p>S-21: Summary H-8: Participant Evaluation Form</p>	<p>Summary/Wrap-Up/Evaluation Review definition and key elements of performance reviews.</p> <p>Distribute Participant Evaluation forms.</p> <p>End 55-Minute Training.</p>	<p>2 minutes ▼</p>



Training Busy Staff to Succeed with Volunteers: The 55-Minute Training Series

“Thumbnail” View of Slides

Training Busy Staff
to Succeed with Volunteers:
The 55-Minute Training Series

*Mutual Performance
Reviews for Volunteers*

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Introduction

- ▶ What comes to mind when you hear or see the word “evaluation”?
- ▶ People frequently have had negative experiences with evaluation in their lives.
- ▶ Be open to performance review as an affirming, mutual, sharing event.

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Learning Objectives:

- ▶ Define a mutual performance review process for volunteers that fits into the total supervision and support system of the organization.
- ▶ Identify the purposes, benefits and barriers to instituting a mutual performance review process.
- ▶ Suggest procedures and tools.
- ▶ Target potential outcomes of mutual performance reviews.

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4 Key Concepts

1. Successful performance reviews provide a periodic opportunity for communication between the person who assigns work and the person who performs it.
2. There are numerous benefits to volunteers and organizations when mutual performance reviews are incorporated into the volunteer management system.
3. At the heart of a good mutual performance review is a clear delineation of volunteer position responsibilities and success indicators, and a discussion of factors contributing to the outcomes of the volunteer’s time.
4. Outcomes from mutual performance reviews can range from “applause” to dismissal – by the organization or by the volunteer.

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Key Concept 1

- ▶ Successful performance reviews provide a periodic opportunity for communication between the person who assigns work and the person who performs it.
- ▶ They discuss what they expect from themselves and each other and how well those expectations are being met.

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Performance Reviews...

- ▶ Should be non-threatening, constructive, supportive, flexible, and empowering.
- ▶ Should encourage the volunteer to stretch for high standards.
- ▶ Should determine how the organization can help the volunteer achieve his/her goals.

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Essential Elements for Success

- ▶ Volunteers learn about review system when they enter the organization.
- ▶ Mutuality is key.
- ▶ Performance reviews are based on previously agreed-upon standards, position descriptions, deadlines, etc.
- ▶ Should have no surprises.

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Essential Elements for Success

- ▶ The process can be formal or informal, depending on organization’s culture.
- ▶ Gradually invite current volunteers to participate – starting with a self-assessment.
- ▶ Schedule a specific time or it will continually be put off!

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Key Concept 2

- ▶ There are numerous benefits to volunteers and organizations when volunteer performance reviews are incorporated into the volunteer management system.

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Benefits of Performance Reviews

- ▶ Statement that volunteers are important and held accountable.
- ▶ Volunteers want success and feedback.
- ▶ A time to express appreciation to volunteers – “valuation feedback.”
- ▶ Time for re-negotiating working agreements.

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Benefits of Performance Reviews

- ▶ Chance to plan for ways to improve volunteer performance in the future (training, new placement).
- ▶ Volunteers can express concerns and “escape” an unfavorable situation.
- ▶ Supervisor can share concerns and dismiss, if warranted.

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Barriers to Performance Reviews

<u>Barriers</u>	<u>Strategies</u>
Our paid staff doesn't receive performance reviews.	Initiate staff reviews first.
We have no policies on mutual performance and dismissal.	Institute policies on performance reviews and dismissal.
Current volunteers are resisting the idea.	Involve volunteers in developing the process.

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“Thumbnail” View of Slides (continued)

Key Concept 3

- ▶ At the heart of a good volunteer performance review is a clear delineation of volunteer job responsibilities and success indicators, and a discussion of factors contributing to the outcomes of the volunteer's time.

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Before the Review Session:

- ▶ Have the volunteer fill out a self-assessment form, including assessment of agency support received.
- ▶ Review volunteer's position description, goals, standards, etc.
- ▶ Evaluate expectation versus performance.
- ▶ Give a written review.

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During the Review Session:

- ▶ Together, review position expectations.
- ▶ Share positive feedback and appreciation.
- ▶ Volunteer shares self-assessment and assessment of agency support.
- ▶ Supervisor assesses volunteer's performance.
- ▶ Discuss barriers to success for volunteer.
- ▶ Discuss future plans for the volunteer in the organization.

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After the Review Session:

- ▶ Write a report for volunteer's and agency's files.
- ▶ Follow up on action plans or agreements between organization and volunteer.

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Key Concept 4

- ▶ Outcomes from volunteer performance reviews can range from "applause" to dismissal – by the organization or by the volunteer.

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Keeping Volunteers Involved

- ▶ Take the opportunity of performance reviews to discuss a volunteer's readiness for new challenges, need for a change or a break, etc.
- ▶ If there has been low productivity or morale on the part of the volunteer, it is important to discuss remedies.

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Reasons for Low Volunteer Productivity or Morale

- ▶ Boredom; too much routine
- ▶ Discontent; personality differences
- ▶ Idleness; fluctuating workload; insufficient staff
- ▶ Lack of interest in the work
- ▶ Ill-defined assignments
- ▶ Inadequate supervision/training
- ▶ Misunderstanding of policies

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Reasons...

- ▶ Resentment, overload, unrealistic deadlines
- ▶ Poor communication with work team
- ▶ Emotional stress and personal difficulties
- ▶ Erratic participation
- ▶ Lack of appreciation by staff
- ▶ Staff and organizational changes
- ▶ Staff resistance to utilizing volunteers

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Dismissal

- ▶ May initiated by the organization or by the volunteer.
 - The volunteer may choose to leave the organization for any number of reasons.
 - The organization may dismiss volunteers due to non-adherence to rules and procedures or due to continued unsatisfactory performance after progressive warnings have taken place.

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Summary

- ▶ Remember that people have often experienced one-sided and frequently negative evaluations.
- ▶ You are introducing a new view of performance evaluation/review as an affirming, mutual, sharing event.
- ▶ The benefits far outweigh the barriers.

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Suggestions for Expanded Activities for Sessions over 55 Minutes:

1. The length of time to cover this topic will vary tremendously due to your organization's comfort level and experience. If you are simply suggesting that performance reviews be adopted, you may wish to cover Key Concepts 1 and 2 to get buy-in and input in one session and Key Concepts 3 and 4 in a second session which focuses on the "how-to's."
2. If there is resistance by current volunteers to the introduction of performance reviews, it would be advisable to hold a session to expose them to the mutual benefits of assessments. Solicit their ideas for a process that would be effective and acceptable in your organization.
3. If you are devoting most of the session to "selling" the concept of performance reviews for volunteers, you may wish to break people into small groups. Have them share any positive personal experiences they have had with personal growth coming from the experience of a performance review.
4. The focus of this module is on getting buy-in and some general skills for performing mutual evaluations. In these sessions, there will often be discussion aimed at problem situations. If this is the case, it is recommended that you include the module called *Volunteer Performance Problems*.



Suggested Resources on Performance Reviews

Books

Graff, Linda L. "Performance Evaluation." Chapter 11 in *Best of All: The Quick Reference Guide to Effective Volunteer Involvement*. Dundas, ON: Linda Graff & Associates, Inc., 2005. Order at <http://www.energizeinc.com/bookstore.html> .

Lee, Jarene Frances with Julia M. Catagnus. "Conducting Formal Evaluations." Chapter 7 in *What We Learned (the Hard Way) About Supervising Volunteers*. Philadelphia: Energize, Inc., 1999. (Excellent examples of forms for use in evaluation.) Order at <http://www.energizeinc.com/bookstore.html> .

Maddux, Robert. *Effective Performance Appraisals* (Crisp Fifty-Minute Series). Crisp Learning, 2000. Order at <http://www.amazon.com> .

McCurley, Steve and Rick Lynch. "Keeping Volunteers on Track." Chapter 11 in *Volunteer Management: Mobilizing All the Resources in the Community*, 2nd edition. Kemptville, ON: Johnstone Training and Consultation, Inc., 2006. (Excellent examples of forms for use in evaluation in Appendix) Order from <http://www.energizeinc.com/bookstore.html> .



Handout 1

The 4 Key Concepts of Mutual Performance Reviews

1. Successful performance reviews provide a periodic opportunity for communication between a person who assigns work and the person who performs it. They discuss what they expect from themselves and each other and how well those expectations are being met.
2. There are numerous benefits to volunteers and organizations when volunteer performance reviews are incorporated into the volunteer management system.
3. At the heart of a good volunteer performance review is a clear delineation of volunteer position responsibilities and success indicators, and a discussion of factors contributing to the outcomes of the volunteer's time.
4. Outcomes from volunteer performance reviews can range from "applause" to dismissal – by the organization or by the volunteer.



Handout 2

Mutual Performance Reviews

Definition:

Mutual performance reviews – part of an organization’s continuous supervision and feedback system – provide an opportunity between the person who assigns the work and the person who performs it to discuss what they expect from themselves and each other, and how well those expectations are being met.

Key Elements:

1. As they enter the organization, volunteers should be appraised of the feedback system, including the system of mutual performance review. It should be described and delivered in positive, empowering terms.
2. Mutuality is the key. It is a time for both the volunteer and the supervisor to share their experiences with one another in the organization.
3. Performance reviews should be based on previously agreed-upon standards, position descriptions, tasks, deadlines, available resources, intervening circumstances, etc.
4. Performance reviews should have no surprises if ongoing supervision and conflict resolution have taken place.
5. Depending on the size and culture of the organization, the process can be formal (with special documents) or done in more informal sessions.
6. It is best to gradually include current volunteers who have not previously been reviewed. Self-assessment may work best as the system is initiated and current volunteers begin to buy into the benefits.
7. It is best if each performance review is scheduled for a specific time; otherwise, it will most likely be put off.



Handout 3

Benefits of Mutual Performance Reviews

1. Strong statements that volunteers are important and that both volunteers and organizations are held accountable to their agreements.
2. Volunteers want to be successful and respond well to feedback.
3. A good time to express appreciation for volunteer efforts and acknowledge accomplishments. Some have chosen to call the sessions “valuation feedback.”
4. Enable volunteers and organizations to renegotiate their working agreement with one another for the next time period.
5. Provide an opportunity for plans to be made to improve volunteer performance in the future (e.g., training, new placement).
6. Allow volunteers to express concerns and "escape" an unfavorable situation.
7. Allow staff to share concerns and "dismiss" a volunteer if the situation requires that action.

What other benefits did you derive from participating in a mutual performance review, either as the supervisor or the worker?

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



Handout 4

Mutual Performance Review Process

Before the Session:

1. Have volunteer fill out (or think about) a self-assessment form (including his/her assessment of the support the organization has given).
2. As supervisor, be prepared for the performance review session by reviewing the volunteer's position description, goals, and standards. Evaluate performance versus expectation for the time period being reviewed.
3. Take notes and write an evaluation on the position expectation versus performance.

During the Session:

1. Together, review the previously agreed-upon position expectations.
2. Share some positive feedback and give appreciation for service.
3. Ask volunteer to share her/his self-assessment and assessment of agency support.
4. Give your assessment of the volunteer's performance based on some format such as Outstanding, Good, Satisfactory, Unsatisfactory.
5. Discuss any barriers the volunteer experienced in carrying out the position and how these might be overcome in the future.
6. Discuss future plans for the volunteer in the organization (higher positions, goals, etc.).

After the Session:

1. Write a report for file (if appropriate).
2. Follow up on any action plans or agreements made by either side.



Handout 5

Volunteer Self-Assessment Form

1. Do you feel you are reaching the expectations listed in your position description (goal setting, etc.)? If not, share your reasons for the gap.
2. Was the estimated time to accomplish your volunteer work realistic? Comment:
3. Did the organization/supervisor provide adequate orientation, training, supervision and resources for you to accomplish your position? Comment and offer suggestions for improvement:
4. What have been your greatest satisfactions in your work here?
5. What have been your greatest disappointments in your work here?
6. Were other volunteers and paid staff receptive and appreciative of your volunteer work? Comment:
7. What were your areas of growth in your volunteer position?
8. Overall I would rank my performance as:
 Superior, exceeding expectations
 Excellent, met expectations
 Needing improvement, did not meet expectations

Comments to explain above answer:
9. What type of assignment, skill development, and time commitment do you desire for next year or the time period under discussion (same position, new challenges, departure)?
10. Other comments, suggestions, etc.



Handout 6

Thoughts on Evaluation Rating Systems for Supervisors of Volunteers

- Volunteers can be rated on factors such as:
 - Job performance
 - People skills
 - Responsibility and motivation

People Skills (example of rating systems):

1. Qualities
 - Adheres to confidentiality policy
 - Relates well to clients, staff and volunteers
 - Is courteous and tactful
 - Cooperates with team of staff and co-workers
 - Is well groomed and adheres to dress code
 2. Accomplishment Levels
 - Superior - Exceeds requirements
 - Excellent - Accomplished tasks
 - Fair - Tasks not fully accomplished
 - Unsatisfactory - Tasks not accomplished
- You need to determine pertinent qualities to be assessed and a rating system that is appropriate for your organization and volunteers.
 - It is important that the volunteer and staff or lead volunteers discuss any performance review and agree to the next steps, particularly if the work is not being accomplished. Numerous factors, both individual and organizational, may be affecting a volunteer's low productivity or morale.



Handout 7

Low Volunteer Productivity or Morale *(when a volunteer might dismiss the organization)*

Volunteers often dismiss or leave volunteer activities due to lack of satisfaction which may stem from one or more of these situations:

- Boredom; too much routine
- Discontent; personality differences
- Idleness: fluctuating workload, insufficient staff
- Lack of interest in the work
- Ill-defined assignments
- Inadequate supervision/training
- Misunderstanding of policies and their purposes
- Resentment, overload, or unrealistic deadlines
- Poor communication within the work team (staff and volunteers)
- Emotional stress and personal difficulties
- Erratic participation
- Lack of appreciation on part of organization/supervisor
- Staff and organizational changes
- Staff resistance to utilizing volunteers

What are some reasons you have “dismissed” an organization where you were doing volunteer work?

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

Was there anything the organization could have done differently that might have kept your interest in continuing to volunteer?

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



Participant Evaluation Form

Thank you for taking the time to share your evaluation of today's seminar. Your critique is valued and will be considered as we continually strive to improve our support to all personnel who team with volunteers.

1. Check the appropriate box to indicate whether you **met**, **partially met**, or **did not meet** the following learning objectives for this workshop:
 - a. Explain how a mutual performance review process fits into the total supervision and support process in an organization.
 met *partially met* *did not meet*
 - b. Discuss the purposes, benefits and barriers of instituting or enhancing a mutual performance review process.
 met *partially met* *did not meet*
 - c. Use a suggested process and tools for performing the review.
 met *partially met* *did not meet*
 - d. Explain the potential outcomes of mutual performance reviews.
 met *partially met* *did not meet*

Comments:

2. This session was:

- | | | |
|--------------|------------------------------|-----------------------------|
| Helpful: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Provocative: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Practical: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Well-paced: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too short: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too long: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |

Comments:



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Participant Evaluation Form (continued)

3. This trainer was:

- Knowledgeable: YES NO
Prepared: YES NO
Organized: YES NO
Enthusiastic: YES NO
Good discussion facilitator: YES NO

Comments:

4. In what ways can you utilize this material in your work?

5. What, if anything, do you plan to do differently as a result of this training?

6. What additional information on this or any other topic dealing with volunteers would be helpful to you in your work?

7. What suggestions do you have to strengthen this workshop?

8. Further comments or suggestions:

NAME (optional) _____

H-8(b)

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PowerPoint® Slides

*To open the attached PowerPoint slides,
double-click the thumbtack icon below.*



Trainer's Guide for Presenting...

Handling Volunteer Performance Problems

Betty Stallings

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Handling Volunteer Performance Problems

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Trainer's Guide for Presenting the
Handling Volunteer Performance Problems
Module

Introduction to Handling Volunteer Performance Problems

Although never a favorite responsibility of volunteer supervision, occasionally there are volunteer performance issues which need to be addressed rapidly and effectively. Often the cause of performance disappointments is directly linked to poor communication, insufficient recognition, and other management inadequacies. Therefore, it is a healthy exercise for organizations to look at their performance gaps and determine what, if any, changes they can make in their recruitment, placement, and supervision of volunteers that would counter volunteer performance problems (skill deficiencies, decline in interest/motivation, resistance to change, etc).

Supervisors of volunteers need to be comfortable confronting volunteers with concerns and working together to solve the problems. Issues need to be clearly shared and documented, and dates need to be set to review progress. When the organization is doing a better job of supporting a volunteer and the volunteer works to correct a performance problem, situations are often handled without the need to examine other options, such as re-assigning to a better suited position, re-training, or asking the volunteer to retire.

Occasionally, infractions of policy, violation of confidentiality, or dangerous activity occur. Then, it becomes necessary for the supervisor to dismiss a volunteer after counseling and other planning have not corrected the problem. Organizations need to have fairly applied policies and procedures for a volunteer's dismissal, probation, suspension, and grievances. These policies, in effect, demonstrate that the work volunteers do in the organization is significant and that volunteers – just as paid staff – are held accountable for complying with the stated policies and regulations of the organization.

People often ask if they can fire volunteers. When you think about it, remember how many volunteers fire *organizations* for a range of reasons, many of which have to do with inadequate support of the work they agreed to perform.

Volunteers are in a partnership with paid staff to carry out the mission of an organization. It is irresponsible to allow any staff, salaried or volunteer, to create a negative impact on the organization through their actions or lack of actions. This module will help staff learn why it is so important to quickly assess and act on volunteer performance gaps and will enhance skill development in confronting and solving these tough situations.



Learning Objectives

The **primary purposes** of this module are to:

- Identify some of the causes of volunteer performance problems.
- Examine options for dealing with volunteer performance gaps and support for changed behavior.

Upon completion of this module, participants will be able to:

1. Appreciate why it is critical to deal with performance gaps in a timely and effective manner.
2. Describe the range and types of frequent volunteer performance problems.
3. Confront and explore appropriate solutions for volunteer performance problems.
4. Apply tips and techniques of dismissing a volunteer.

General Notes to Trainer

1. This workshop is in a suggested format. Feel free, however, to personalize it with your own stories. Also, phrase questions and activities in a manner most attuned to your organization.
2. Although the focus of this workshop is on performance problems of volunteers, much of it will be applicable as well to paid staff performance problems in terms of assessing them, looking for options to bring about solutions, and handling dismissals.
 1. People who have dismissed volunteers often need to share their experiences with the process. Most share their initial grave misgivings about the outcome but find that, once they handle the problem, they are able to re-focus on building the program.
 2. It is important to reiterate that this is a cursory overview of the necessary skills to handle performance problems. You may wish to have a longer time period in which to cover the topic if this has been a problem in your organization. If there is not an organizational philosophy or procedure to carry out dismissals, it would be best to work on that issue and use the seminar to introduce the new policies.



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3. Because there are four key concepts to cover, presentations and facilitation must be crisp and timed. If participants want more information, use this as an opportunity to ask for future additional training time on the topic. You may also want to share some of the excellent Resources found at the end of the module.
4. International trainer Steve McCurley has written extensively on this topic. Information on dismissal and working with difficult volunteers is found in most of his books (see Resources).
5. You may wish to combine this module with the module on *Mutual Performance Reviews*. It is very difficult to fire a volunteer when you do not have a system of mutual performance review in place. Often problems can be picked up much earlier if there is good communication and reviews between the supervisor and volunteer.
8. You should make certain that policies for handling volunteer performance problems are aligned with those for staff. If there are no such employee policies, you may want to encourage the organization to develop policies for both salaried and volunteer staff.



Presentation Overview

SLIDES/ HANDOUTS	SECTION	METHOD OF PRESENTATION	TIME
S-1 to 6	Introduction <ul style="list-style-type: none"> • Definition • Learning Objectives • Opening Exercise • 4 Key Concepts 	Presentation/ brainstorming	10 minutes
H-1			
S-7 to 9	Key Concept 1 Volunteer performance problems linked with management elements	Presentation & Exercise	15 minutes
H-2			
S-10 to 15	Key Concept 2 Range and types of volunteer performance problems	Presentation & Activity	8 minutes
H-3			
S-16 to 19	Key Concept 3 Rules of Constructive Feedback	Presentation & Activity	10 minutes
H-4, H-5			
S-20 to 25	Key Concept 4 Volunteer Dismissal	Presentation/Discussion	10 minutes
S-26	Summary/Wrap-up/ Evaluation	Presentation	2 minutes
H-6			Total: 55 Minutes



Presentation Script

SLIDE/ HANDOUT	SECTION	TIME
S-1: Definition	<p style="text-align: center;">Opening Comments and Exercise</p> <p>To get the participants thinking about handling volunteer performance problems, begin by sharing a working definition of “performance problems.”</p> <p>Definition: Performance problems are gaps between what is expected from volunteers and what is actually happening.</p> <p>It is important to note that since volunteers are partners in achieving the mission, performance problems might be caused by actions either from volunteers, the supervisor, the organization, or some combination of all three. Thus it is necessary to assess the causes of the behavior as well as options for addressing them.</p>	10 minutes ▼
S-2 to 3: Purposes & Objectives	<p>Purposes and Learning Objectives</p> <p>Review the purposes and learning objectives of the seminar.</p>	
S-4: Warm-up Questions	<p>Warm-up Discussion</p> <p>Ask participants: “Why do we often hesitate to deal with performance problems?”</p> <p>Answers may include:</p> <ul style="list-style-type: none"> • “They are volunteers and it is more difficult to approach them.” • “They may quit.” • “We know that we have not been clear on expectations.” • “They have other personal priorities that impact their lives.” • “They are major financial donors.” • “We don’t have any policies to deal with this issue.” • “It is a personality issue and that is touchy to deal with.” <p>The above and other reasons may be true, <i>but</i> ask: “Why is it critical to deal on a timely and effective basis with volunteer performance issues?”</p>	



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SLIDE/ HANDOUT	SECTION	TIME
S-5: Why?	<p>Answers may include:</p> <ul style="list-style-type: none"> • “If we don’t deal with the problems, other volunteers and staff may be negatively impacted by this behavior or performance issue.” • “It will appear that we do not hold volunteers accountable unless we do deal with these issues.” • “It basically says that we hold the work that volunteers perform in high regard and want to support their work adequately.” • “Allowing time to go by reinforces the behavior and the volunteer is not aware of our concerns.” • “Volunteers want to be successful and, if we do not discuss concerns that are impacting their performance, they are apt to ultimately experience failure.” • “The organization may resist utilizing volunteers in any significant way if poor performance is not addressed.” • “We need to determine if there is anything that we as supervisors or as an organization need to do to help improve/end the situation.” • “The volunteer may be in the wrong position.” • “The volunteer may need to be dismissed.” <p>Summarize the discussion: Although it may sometimes be difficult to address volunteer performance problems, it is imperative for the health of the organization and for the volunteer to deal in an effective and timely fashion with these issues.</p>	<p style="text-align: center;">▲</p> <p style="text-align: center;">(same 10 minutes)</p>
S-6: 4 Key Concepts H-1: 4 Key Concepts	<p>This in-service training is built on 4 Key Concepts. (Indicate that during the workshop each concept will be examined together with relevant material.)</p> <p>You may choose to distribute all handouts for this module at this time; then participants can fully participate in the discussion, knowing that their handouts cover all key information shared in the seminar. Or you may choose to distribute the handouts as each concept is discussed.</p>	
S-7: Key Concept 1	<p style="text-align: center;">Key Concept 1</p> <p>It is important to determine if there are inadequacies in your volunteer program that are impacting the number of volunteers displaying performance problems.</p>	<p style="text-align: center;">15 minutes</p> <p style="text-align: center;">▼</p>



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SLIDE/ HANDOUT	SECTION	TIME
<p><i>(continued)</i> S-7: Key Concept 1</p>	<p><i>(continued)</i> Presentation: It is important to note that often volunteer performance problems are aggravated by deficiencies in the volunteer program. Identify areas that may explain or partially explain volunteer problems and assign a task force to address some of the issues identified in this discovery.</p>	<p style="text-align: center;">▲ (same 15 minutes)</p>
<p>S-8 to 9: What May Impact H-2: Link between program elements and performance problems</p>	<p>The following aspects of a volunteer program may impact volunteer behavior. Identify areas where your organization is strong and where it is weak. If time allows, discuss the impact that each of these might have on volunteer performance issues.</p> <ul style="list-style-type: none"> • Clear position descriptions (shared with volunteers and with staff) • Tailored and honest recruitment • Placing the right person in the right position • Organizational and position screening • Clear, written, shared volunteer policies and procedures • Excellence in delegation • Organization held accountable for supporting volunteer work • Volunteers held accountable for work they have agreed to perform • Mutual performance reviews between volunteer and volunteer’s supervisor • Honest, timely feedback system for supervisor and volunteer to follow • Volunteers given opportunity for input into work assignment (as appropriate) • Effective, supportive supervision (orientation, training, coaching) • Ongoing appreciation for work of volunteers 	
<p>S-10: Key Concept 2</p>	<p style="text-align: center;">Key Concept 2 It is important to understand the range and types of performance problems that are most likely to occur in volunteer programs.</p>	<p style="text-align: center;">8 minutes ▼</p>



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SLIDE/ HANDOUT	SECTION	TIME
<p>S-11: Your Experience</p> <p>H-3 : Range and Types</p>	<p>Activity: Have participants think of a performance problem of a volunteer with whom they work. Ask them to analyze/identify the problem from a range of performance variations (see below) and a listing of frequent performance problems.</p>	<p>▲ (same 8 minutes)</p>
<p>S-12: Range of Performance Problems</p>	<p>Range of performance problems:</p> <p>1. From bothersome to dangerous or seriously impacting the volunteer, clients, staff, program/organization. Obviously, any behavior that is or could potentially be dangerous to the volunteer or anyone involved in the organization must be handled swiftly.</p> <p>2. From unusual behavior for that person to an ongoing pattern of behavior. It is good to acknowledge new, problematic behavior that has not previously been a pattern so that you can possibly pick up the reasons for the change and work with the volunteer to return to more acceptable behavior. Ongoing problematic behavior is probably a sign that no one has been willing to deal with it and it is important to take the time to do so before more potential damage is done.</p> <p>3. From behavior stemming from inability to carry out the work to irritating personality traits. If you discover that the behavior is due to an inability to carry out the work, additional training and coaching may be an appropriate response. If personality traits are impacting others in the organization, it is important that the volunteer be given feedback on the impact of his or her approach/attitude/style of communication, etc.</p> <p>4. From behavior that might be characteristic of many folks to those which you recognize as behaviors that “push your hot button” for any number of reasons.</p> <p>Be aware of behavior that may only impact you because of some things in your past that have caused the behavior to be a “hot button” manifestation for you.</p>	



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SLIDE/ HANDOUT	SECTION	TIME
S-13 to 14: Difficult Types of Behavior	<p>Ask participants to list some of the difficult behaviors they deal with (or have dealt with) when partnering with volunteers:</p> <p>Answers may include:</p> <ul style="list-style-type: none"> • Unable to do the work (lacking skills, background, etc.) • Undependable (late or not showing up, not coming through with promised work, etc.) • A drop in skill level since they started the work • Confidentiality breach • Behavior offensive to others • Burnt out, martyr behavior • Not able to delegate as a leader; controlling • “Founder syndrome” behavior (controlling visionary without management capability, etc.) • Working beyond the limits/boundaries of job • Misrepresenting the organization • Too long in same position; ownership issues • Unfriendly to new volunteers • Not following policies/procedures • Personal problems interfering with doing volunteer work • Excessively dependent – taking a great deal of supervisor’s time • Resisting change when it is needed • Lost interest/dedication <p>Note: It is helpful to translate any attitudes/personality traits such as negative, dominating, dependent into behaviors so that they are not looked upon as attacking the person but rather the behavior and its implications.</p>	<p style="text-align: center;">▲</p> <p style="text-align: center;">(same 8 minutes)</p>
S-15: Activity	<p>Optional Activity:</p> <p>Ask small groups to use real examples (without names) of one of the above performance problems and answer the following questions to help assess it:</p> <ol style="list-style-type: none"> 1. What might be caused by any ineffectiveness on the part of the organization and what might primarily be behaviors that volunteers bring to the situation? 	



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SLIDE/ HANDOUT	SECTION	TIME
<i>(continued)</i> S-15	<i>(continued)</i> 2. What has been done to improve the situation and what has been the result? (You may find that no action has been taken, just lots of mental stress exhibited. Also remember you do not change someone's behavior except by changing how you interact with the person to gain a different response.) 3. What may be a new approach to the situation to achieve a different result? (If time allows, make new suggestions for ways to confront the situation.)	▲ (same 8 minutes)
S-16: Key Concept 3	Key Concept 3 Use constructive rules of approaching difficult volunteer performance issues and explore options for diminishing the problem or supporting changed behavior.	10 minutes ▼
H-4: Rules of Constructive Confrontation S-17 to 18	Presentation: Review or teach participants the Rules of Constructive Confrontation: 1. Don't attack personality; focus on performance. 2. Be specific. Do your homework and have specific examples of the behavior to share. 3. Keep the conversation private. 4. Make the intervention timely but do not approach it until you are rational and calm. 5. Reiterate expected behavior using "I" not "you" language. 6. Get agreement on the problem; allow volunteer to explain from his/her perspective. 7. Determine a shared commitment for finding a solution to the problem. 8. Agree on a plan (both parties) to solve the problem. 9. Arrange for a follow-up meeting to determine if the issue is resolved or needs alternate solution options.	
S-19: Alternatives	Present some of the alternative options (other than dismissal) to deal with performance problems: 1. Re-assign to a new position if the volunteer is simply not a fit for the current position and training/information will not improve the situation. 2. Train/coach or re-train , depending on whether the volunteer received adequate preparation to handle the position in the first place. 3. Provide a more motivating environment for the volunteer if s/he has lost interest in the work/mission.	



Training Busy Staff to Succeed with Volunteers:
The 55-Minute Training Series

SLIDE/ HANDOUT	SECTION	TIME
<p><i>(continued)</i> S-19: Alternatives</p>	<p><i>(continued)</i> 4. Give the volunteer information about any central referral source in the community or online where s/he might find a volunteer position better suited to her/him. 5. If the volunteer, due to age or disability, is no longer able to carry out the work and no other position is appropriate, retire him/her with style and appreciation for past service. Optional Activity: Continuing with the same small groups as in the Optional Activity in Key Concept 2, ask the groups to use information just covered to evaluate those potential options and approaches to their volunteer performance situation.</p>	<p style="text-align: center;">▲ (same 10 minutes)</p>
<p>S-20: Key Concept 4</p>	<p style="text-align: center;">Key Concept 4 When all options fail, or when an infraction is extremely serious (one listed in policies as cause for immediate dismissal), it may be in the best interest of the organization and the volunteer to dismiss the volunteer from his/her position.</p>	<p style="text-align: center;">10 minutes ▼</p>
<p>S-21 : Dismissal</p>	<p>Review your organization's policy/views on dismissal (whether it be initiated by the volunteer or the organization) and share your procedures for carrying it out. It's important to remember: Dismissal can be initiated by the volunteer or the organization. The volunteer may leave the organization for any number of reasons and the organization can dismiss volunteers due to non-adherence of organizational rules and procedures or due to continued unsatisfactory performance after progressive warnings have been issued.</p>	
<p>S-22: Vol.-Initiated</p>	<p>ACTIVITY: Lead discussion on volunteer-initiated and organization-initiated dismissals. Volunteer-Initiated Dismissal (firing) of the organization When a volunteer chooses to leave an organization, it is helpful to bring closure to the relationship through an exit interview designed to:</p> <ul style="list-style-type: none"> • Gain a better idea of the volunteer's experience with the organization. • Thank them for their service. • Pinpoint problems with some staff, departments, or divisions of the organization. • Prevent or mitigate any bad feelings traveling out to the community by apologizing for any problems caused by the organization. 	



Training Busy Staff to Succeed with Volunteers:
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SLIDE/ HANDOUT	SECTION	TIME
S-23: Org.-Initiated	<p>Organization-Initiated Dismissal It might be difficult to imagine yourself firing a volunteer, and often it is nearly impossible to do so because the organization does not have the appropriate systems in place to perform a dismissal. When in doubt, use organizational standards already in place for firing a salaried employee.</p> <p>Remember, however, that a volunteer must first be clearly informed of his/her role and responsibilities through a clear job description. They must understand from the start of the relationship that certain standards and expectations must be met for success and continuation of the relationship with the organization.</p>	<p style="text-align: center;">▲</p> <p>(same 10 minutes)</p>
S-24:Procedures H-5: Procedures for releasing a volunteer	<p>Optional Activity: Share this example of a four-part system to deal with serious problems that have not been resolved:</p> <ol style="list-style-type: none"> 1. Write an official warning letter to the volunteer, including specific information about behavior that needs to change. 2. Provide assistance to change the behavior, along with documentation of change. 3. Implement probation with special goals. 4. Dismissal if goals are not met. 	
S-25: Tips	<p>Four standard tips for carrying out a dismissal procedure (though each organization will have its own manner/style of handling this):</p> <ol style="list-style-type: none"> 1. As part of orientation, each volunteer should receive a copy of the agency policies on dismissal, including a policy on suspension and grievance procedures. This provides volunteers with forewarning that volunteers can be let go. It also assures salaried staff that volunteers will be dismissed if the situation calls for that response. 2. With few exceptions (observed harm to clients, theft, etc.), volunteers should not be dismissed until you have an opportunity to provide an in-depth investigation, making certain that you have proof of violation of agency policies or performance standards. You may choose to suspend the volunteer while the investigation is taking place. Determine if there are any excusable or extenuating circumstances; always document, in writing, your investigation and conclusions. It is advised that you confirm the termination in writing with the volunteer. 	



Training Busy Staff to Succeed with Volunteers:
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SLIDE/ HANDOUT	SECTION	TIME
<p><i>(continued)</i> S-25: Tips</p>	<p>3. Dismissing volunteers should be handled fairly and with utmost diplomacy. Don't apologize for your decision. Allow for an appeals process.</p> <p>4. Provide notification to staff, clients, and other volunteers who need to be informed that the volunteer will no longer be working at the organization.</p>	<p>▲ (same 10 minutes)</p>
<p>S-26: Summary H-6: Evaluation Form...</p>	<p>Summary/Wrap-Up/Evaluation</p> <p>It is critical that volunteer performance gaps are handled quickly and fairly, always evaluating if these problems are caused by management inadequacies, issues personal to the volunteer, or a combination of both. It is important to assess the performance problem and develop a mutual plan to diminish it. If it persists or the behavior of a volunteer is a serious problem to the clients or organization, you may need to proceed with dismissal procedures.</p> <p>Distribute Participant Evaluation forms.</p> <p>End 55-Minute Training.</p>	<p>2 minutes ▼</p>



Training Busy Staff to Succeed with Volunteers: The 55-Minute Training Series

“Thumbnail” View of Slides

Training Busy Staff
to Succeed with Volunteers:
The 55-Minute Training Series

*Handling Volunteer
Performance Problems*

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*Definition of
“Performance Problems”*

- ▶ Performance problems are gaps between what is expected from volunteers and what is actually happening.

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Purposes of Module

- ▶ Identify some of the causes of volunteer performance problems.
- ▶ Examine options for dealing with volunteer performance gaps and support for changed behavior.

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Learning Objectives

- ▶ Appreciate why it is critical to deal with performance gaps in a timely and effective manner.
- ▶ Describe the range and types of frequent volunteer performance problems.
- ▶ Confront and explore appropriate solutions for a volunteer performance problem.
- ▶ Apply tips and techniques of dismissing a volunteer.

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Warm-up Questions

- ▶ Why do we often hesitate to deal with performance problems?
- ▶ Why is it critical to deal on a timely and effective basis with volunteer performance issues?

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Why deal with performance issues?

- ▶ Other staff/volunteers are effected.
- ▶ No accountability otherwise.
- ▶ Holds volunteer work in high regard.
- ▶ Poor behavior is reinforced when not noted.
- ▶ Volunteers won't be able to be successful.
- ▶ Staff will resist utilizing volunteers.
- ▶ Volunteer may be in wrong position.
- ▶ Volunteer's position may need to be changed.
- ▶ Volunteer may need to be dismissed.

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4 Key Concepts

1. It is important to determine if there are inadequacies in your volunteer program that are impacting the number of volunteers displaying performance problems.
2. It is important to understand the range and types of performance problems that are most likely to occur in volunteer programs.
3. Use constructive rules of approaching difficult volunteer performance issues and explore options for diminishing the problem or supporting changed behavior.
4. When all options fail, it may be in the best interest of the organization and the volunteer to dismiss the volunteer.

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Key Concept 1

- ▶ It is important to determine if there are inadequacies in your volunteer program that are impacting the number of volunteers displaying performance problems.

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*What May Impact
Volunteer Performance Problems*

- ▶ Clear position descriptions
- ▶ Tailored and honest recruitment
- ▶ Placement of the right volunteer into the right position
- ▶ Organizational and position screening
- ▶ Clear, written, shared volunteer policies and procedures
- ▶ Excellence in delegation

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*What May Impact
Volunteer Performance Problems*

- ▶ Organization held accountable for supporting volunteers and volunteers held accountable for what they agreed to perform
- ▶ Mutual performance reviews
- ▶ Honest, timely feedback system
- ▶ Volunteers given opportunity for input into work assignment
- ▶ Effective, supportive supervision
- ▶ Ongoing appreciation

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Key Concept 2

- ▶ It is important to understand the range and types of performance problems that are most likely to occur in volunteer programs.

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Your Experience

- ▶ Think of a performance problem you've experienced with a volunteer.
- ▶ Analyze/identify the problem from a continuum of variations.

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“Thumbnail” View of Slides (continued)

Range of Performance Problems

1. From bothersome to dangerous or seriously impacting the volunteer, clients, staff, program/organization.
2. From unusual behavior for that person to an ongoing pattern of behavior
3. From behavior stemming from inability to carry out work to irritating personality traits.
4. From behavior characteristic of many folks to those which you recognize as behaviors which "push your hot button" for any number of reasons.

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Difficult Types of Behavior

- Unable to do the work
- Undependable
- Drop in skill level
- Confidentiality breach
- Behavior offensive to others
- Burnt out, martyr behavior
- "Founder syndrome"
- Working beyond boundaries of position

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Difficult Types of Behavior

- Misrepresenting organization
- Too long in same position
- Unfriendly to new volunteers
- Not following policies/procedures
- Personal problems
- Excessively dependent
- Resisting change
- Losing interest/dedication

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Activity

► Identify a real performance issue with a volunteer and answer the following questions:

- What might have been caused by any ineffectiveness on the part of the organization and what might primarily be behavior that the volunteer brought to the situation?
- What has been done to improve the situation and what has been the result?
- What may be a new approach to the situation to achieve a different result?

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Key Concept 3

► Use constructive rules of approaching difficult volunteer performance issues and explore options for diminishing the problem or supporting changed behavior.

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Rules of Constructive Confrontation

- Don't attack personality; focus on performance
- Be specific. Do your homework and have specific examples of the behavior to share.
- Keep conversations private.
- Make intervention timely but do not approach until you are calm and rational.
- Reiterate expected behavior using "I" not "you" language.

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Rules of Constructive Confrontation

- Get agreement on the problem. (Allow volunteer to share own perspective.)
- Determine a shared commitment for finding a solution to the problem.
- Agree on a mutual plan to solve the problem
- Arrange for a follow-up meeting to determine if the issue is resolved or needs an alternate solution.

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Alternatives

- Re-assign to new position in your organization.
- Train/coach or re-train.
- Provide a more motivating climate if volunteer has lost interest in the work/mission.
- Give information on where and how to find a better-suited volunteer position in another organization.
- If age or disability prohibits carrying out the position, retire the volunteer with style.

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Key Concept 4

► When all options fail, or when an infraction is extremely serious (one listed in policies as cause for immediate dismissal), it may be in the best interest of the organization and the volunteer to dismiss the volunteer.

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Dismissal

- Review your organization's policy/views on dismissal and share your procedures for carrying it out.
- Dismissal can be initiated by either the volunteer (yes, they can fire us!) or the organization.

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Volunteer-Initiated Dismissal

► When the volunteer chooses to leave the organization, bring closure to the relationship through an exit interview to:

- Gain a better understanding of the problems that the volunteer experienced with the organization.
- Thank them for their service.
- Pinpoint problems with some staff, departments or divisions of the organization.
- Prevent or mitigate any bad feelings traveling out to the community.

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Organization-Initiated Dismissal

- Appropriate systems must be in place to fire a volunteer. When in doubt, use the standards and procedures for dismissing a paid employee.
- Each volunteer must understand from the start that certain standards and expectations must be met for success and continuation of the relationship.

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“Thumbnail” View of Slides (continued)

Procedures for Releasing a Volunteer

1. Official warning letter sent to volunteer including specific information of what behavior needs to change and by when.
2. Provide assistance to help volunteer change the behavior – and document changes.
3. Give probation with special goals.
4. Dismissal if goals are not achieved.

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Tips for a Dismissal System

- ▶ In orientation, volunteers should receive agency policies which include information on dismissal, suspension, and grievance procedures.
- ▶ With only a few clear exceptions, a volunteer should not be dismissed without an investigation to make certain that policies were violated or performance was well below standard. (Can suspend while investigating.)
- ▶ Dismissal should be handled fairly and with utmost diplomacy. Don't apologize. Allow for appeals process.
- ▶ Provide notification to staff, clients and other volunteers that the volunteer will no longer be working at the organization.

S-25

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Summary

- ▶ Handle volunteer performance gaps quickly and fairly.
- ▶ Evaluate if a problem is caused by management inadequacies, issues personal to the volunteer, or a combination of both.
- ▶ Develop a mutual plan with the volunteer to diminish the problem.
- ▶ If problem persists, dismissal may be needed.

S-26

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Suggestions for Expanded Activities for Sessions over 55 Minutes:

1. If you use this 55-minute module as timed, you will not be able to fully debrief the exercises and activities. You may choose to take one or two concepts as the focus for each training and do the exercises, or you can ask all participants the questions associated with the activities and exercises and facilitate the answers. Then surface themes and suggestions that arise from the discussion.
2. One way to develop interest in this module is to have a 15-minute discussion during a staff meeting. Focus on questions dealing with the comfort levels and feelings of competence in confronting volunteers when difficult situations arise. If you have already dealt with this discussion, you can begin with Key Concept 1 when you present the training.
3. Key Concept 1 deals with the link between poor management practices and possible volunteer performance problems. This concept could take several hours if each element in the exercise is looked at in-depth and discussions occur regarding ways to enhance each element (job design or recognition to improve volunteer performance). In essence, you could have a mini-workshop on strengthening your volunteer program. Participants would see the value of some of the elements when the link is made to behavior of volunteers that result from poor communication, work design, supervision, etc.
4. One activity that is fun to use to introduce this topic is to ask the participants if they thought anyone ever classified them as a “problem volunteer” or staff member. A number will invariably share that they have, and that the real problem was the staff supervising them or some problems within the organization. It tends to lighten up the discussion when many folks realize that others may see them as the “problem.”
5. You may want to determine if there are any problem behaviors that are common in your organization. This may well be due to some inadequacies of the program. Volunteers become problems due to these inadequacies.
6. One way to run the workshop is to identify some troublesome behaviors (staying on the job too long, resisting change, or drop in skill level). Look closely at how you might approach each type of problem.
7. Do some role plays to help people use the concepts shared in Handout 4, “Rules of Constructive Confrontation.” Develop a scenario which would likely occur in your organization. Perhaps you might have a volunteer leader who is very controlling/not good at delegation. In dyads, ask one person to counsel this volunteer in improving his or her leadership style. (Remember to use “I” language, speak about specific examples of behavior observed, and work towards defining and resolving the problem together.)
8. Review your organization’s philosophy and procedures for dismissing a volunteer. If you do not have any, arrange to develop them and then have the workshop for purposes of sharing the new procedures with staff who supervise volunteers. If staff do not feel that they can dismiss a volunteer who is exhibiting serious, ongoing performance problems, they will be unlikely to want any volunteers working for them.
9. To add some levity to the workshop, divide the group in two for Key Concept 4 (dismissal). Have one group list all the reasons volunteers fire organizations; have the second group list the reasons that organizations must occasionally fire volunteers. It reminds participants that often volunteers are firing us!



Suggested Resources on Handling Volunteer Performance Problems

Books

Graff, Linda L. "Corrective Action." Chapter 12 in *Best of All: The Quick Reference Guide To Effective Volunteer Involvement*. Dundas, ON: Linda Graff and Associates, 2005. Order at <http://www.lindagraff.ca> or <http://www.energizeinc.com/bookstore.html> .

Lee, Jarene Frances and Julie Catagnus. *What We Learned (the Hard Way) about Supervising Volunteers*. Philadelphia: Energize, Inc., 1999. Order at <http://www.energizeinc.com/bookstore.html> .

McCurley, Steve and Rick Lynch. "Releasing a Volunteer from Service." Chapter 11 in *Keeping Volunteers: A Guide to Retention*. Olympia, WA: Fat Cat Publications, 2005. Order at <http://www.energizeinc.com/bookstore.html> .

McCurley, Steve and Rick Lynch. "Keeping Volunteers on Track." Chapter 11 in *Volunteer Management: Mobilizing All the Resources in the Community*, 2nd ed. Kemptville, ON: Johnstone Training and Consultation, Inc., 2006. Order at <http://www.energizeinc.com/bookstore.html> .

McCurley, Steve and Sue Vineyard. *Handling Problem Volunteers*. Darien, IL: Heritage Arts, 1998. Order at <http://www.energizeinc.com/bookstore.html> .

Articles

Rehnborg, Sarah Jane. "A Few Points on the Unpleasant Topic of Firing Volunteers." Service-Leader Web Site, <http://www.serviceleader.org/new/managers/2005/07/000270>.

"Volunteers Aging In Place." Keyboard Roundtable feature of *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. V, Issue 4, July - September 2005. <http://www.e-Volunteerism.com>.



Handout 1

The 4 Key Concepts of Handling Volunteer Performance Problems

1. It is important to determine if there are inadequacies in your volunteer program that are impacting the number of volunteers displaying performance problems.
2. It is important to understand the range and types of performance problems that are most likely to occur in volunteer programs.
3. Use constructive rules of approaching difficult volunteer performance issues and explore options for diminishing the problem or supporting changed behavior.
4. When all options fail, or when an infraction is extremely serious (one listed in policies as cause for immediate dismissal), it may be in the best interest of the organization and the volunteer to dismiss the volunteer from his/her position.



Handout 2

Link Between Volunteer Program Elements and Performance Problems

Element	Performing Well	Needs Work	Suggestions for Improvement
Job Descriptions			
Recruitment			
Placement			
Policies/Procedures			
Delegation			
Accountability			
Organizational Support			
Mutual Performance Reviews			
Timely Feedback System			
Volunteer Input			
Orientation			
Training/Coaching			
Recognition			



Handout 3

Range and Types of Volunteer Performance Problems

Range of Performance problems:

- From bothersome to dangerous or seriously impacting clients, staff, or program.
- From unusual behavior to an ongoing pattern.
- From behavior stemming from inability to carry out the work to irritating personality.
- From normal behavior to behavior that “pushes your hot button.”

Types of Performance Problems:

Lacking skills, background	Controlling	Breaking Policy
Lacking respect	Founder Syndrome	Personal Problems
Undependable	Out of bounds	Very dependent
Confidentiality breach	Misrepresenting organization	Resisting change
Behavior offensive to others	Too long in position	Lost interest
Burn out, martyr behavior	Unfriendly to new volunteers	Others

Question to answer: What is the type and range of performance problem you are dealing with?



Handout 4

Rules of Constructive Confrontation

1. **Don't attack personality, focus on performance.**
2. **Be specific. Do your homework and have specific examples of behavior concerning you. Don't say: "You always do it that way."**
3. **Keep conversations private.**
4. **Make the intervention timely but do not approach until you are rational and calm.**
5. **Reiterate expected behavior using "I" not "you" language.**
6. **Get agreement on the problem. Allow the volunteer to explain from his/her perspective.**
7. **Determine a shared commitment for finding a solution to the problem.**
8. **Agree on a plan (both parties) to solve the problem.**
9. **Arrange for a follow-up meeting to determine if the issue is resolved or needs alternative solution options.**

Alternative Solution Options

1. **Re-assign** to a new volunteer position within the organization, if appropriate.
2. **Train/coach or re-train**, depending on whether the volunteer received adequate preparation to handle the position in the first place.
3. Provide a **more motivating environment** for the volunteer if s/he has lost interest in the work.
4. Give information about any **central referral source** in the community or online where the volunteer might find a position better suited to him/her.
5. If the volunteer, due to age or disability, is no longer able to carry out the work and no other position is appropriate, **retire him/her** with style and appreciation for past service.



Handout 5

Procedure for Releasing a Volunteer

Procedures

1. Procedures that address standards of volunteer conduct, grounds for dismissal, and written policies dealing with problem situations should be covered during orientation and training with the volunteer. Often it is the same policy that salaried staff have in their personnel policies to cover probation, suspension, and termination.
2. If alternatives have been explored and tried and none have been successful, a standard process should be initiated:
 - **Forewarning/notice** - The volunteer is notified by his/her supervisor that there is some serious concern about his/her behavior. You may need to suspend the volunteer while an investigation is underway. You would very rarely fire a volunteer on the spot, unless there is obvious danger to clients and the organization if the volunteer continues the behavior.
 - **Investigate** to determine whether the volunteer has, indeed, broken the rules or if there is adequate evidence that s/he should be dismissed from the position. During this phase, it is important to determine whether the organization's management/staff could be linked to this problem, in addition to the inadequacies of the volunteer's behavior. Assuming that alternative solutions to dismissal have been explored, and that there is clear evidence for dismissal, the dismissal process should commence quickly.

The Release Meeting

- Meet in private. Be quick, direct, and absolute in announcing your decision. There should be no further discussion at this point.
- Allow the volunteer to resign to "save face" and to help prevent the volunteer from spreading bad PR into the community.
- Notify all others in the system who need to know that the volunteer will no longer be carrying out that role.
- Keep written records of:
 - Deficiencies in performance.
 - Attempts to correct the behavior (counseling, coaching, warnings, evaluation forms given to volunteer).
 - Any signed documentation from those who can verify the behavior.
- Follow-up with a letter to the volunteer reiterating the decision and sharing departure information.



Participant Evaluation Form

Thank you for taking the time to share your evaluation of today's seminar. Your critique is valued and will be considered as we continually strive to improve our support to all personnel who team with volunteers.

1. Check the appropriate box to indicate whether you **met**, **partially met**, or **did not meet** the following learning objectives for this workshop:

a. Appreciate why it is critical to deal with performance gaps in a timely and effective manner.

met *partially met* *did not meet*

b. Identify the link between some volunteer program inadequacies and volunteer performance problems.

met *partially met* *did not meet*

c. Understand the range and types of frequent volunteer performance problems.

met *partially met* *did not meet*

d. Learn to confront and explore appropriate solutions for a volunteer performance problem.

met *partially met* *did not meet*

e. Learn key tips and techniques of dismissing a volunteer.

met *partially met* *did not meet*

Comments:

2. This session was:

Helpful: YES NO

Provocative: YES NO

Practical: YES NO

Well-paced: YES NO

Too short: YES NO

Too long: YES NO

Comments:



Training Busy Staff to Succeed with Volunteers: *The 55-Minute Training Series – Evaluation Form*

Participant Evaluation Form (continued)

3. This trainer was:

- Knowledgeable: YES NO
- Prepared: YES NO
- Organized: YES NO
- Enthusiastic: YES NO
- Good discussion facilitator: YES NO

Comments:

4. In what ways can you utilize this material in your work?

5. What, if anything, do you plan to do differently as a result of this training?

6. What additional information on this or any other topic dealing with volunteers would be helpful to you in your work?

7. What suggestions do you have to strengthen this workshop?

8. Further comments or suggestions:

NAME (optional) _____

Training Busy Staff to Succeed with Volunteers: *The 55-Minute Training Series*

PowerPoint® Slides

*To open the attached PowerPoint slides,
double-click the thumbtack icon below.*



Trainer's Guide for Presenting...

Volunteer Program Evaluation

Betty Stallings

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Volunteer Program Evaluation

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Trainer's Guide for Presenting the *Volunteer Program Evaluation* Module

Introduction to Volunteer Program Evaluation

Due to increasing pressure for accountability in volunteer programs, expectations have been mounting to demonstrate the value of volunteer programs. "Doing nice things" simply is not enough in today's world of diminishing resources. Also, continuing to operate a volunteer program that no one has evaluated in order to set improvement goals is the formula for eventual failure.

Many who supervise volunteers believe that they have neither the time to evaluate the activity of volunteers nor the expertise to truly assess the value of any volunteer program they operate. This is one activity that we need to make time for because it will have the greatest impact on the success of our programs. If we can carry out thoughtful evaluations that seek to answer important questions, both quantitative and qualitative, about our programs, these programs are more likely to succeed.

There are a number of methods to evaluate the impact and merits of a program and its value to all customers and to the mission of the organization. The results can be used to demonstrate accountability, make decisions about resources or policy, explore benefits of volunteer contributions, assess cost-benefit to the sponsoring or funding organization, and assess cost-effectiveness of the program itself.

This module covers the key questions that one needs to answer prior to designing a volunteer program evaluation; some of the most common methods of gathering information; and the significance of engaging the right stakeholders in the creation and dissemination stages of this activity.

The work of evaluating your volunteer program should always be done by a task force of several people. If the organization does not have expertise in evaluation, it is helpful to recruit a researcher from a university or a professional who is familiar with the design and dissemination of evaluations. Often this person can be a volunteer who is studying evaluation at college (and needs experience), or a business person who could guide the process.

This module is a brief introduction to this topic. It gives participants the chance to consider the value of performing evaluations; some techniques and their values and shortcomings; and consideration for dissemination of the results to selected stakeholders. The Resources section provides more in-depth resources about this critical topic.

It is important to note that evaluation of a volunteer program is a different activity from evaluating the work of individual volunteers. Another training module, *Volunteer Performance Reviews*, focuses on the purpose/process of a mutual exploration of the original agreement between a volunteer and the organization.



Learning Objectives

The **primary purposes** of this module are to:

- Identify the steps needed to establish a volunteer program evaluation
- Explore four types of volunteer program evaluation.
- Learn to identify significant stakeholders who need results of the evaluation communicated to them.

Upon completion of this module, the participants will be able to:

1. Discuss the purpose and values of carrying out a volunteer program evaluation.
2. Identify key steps and questions to be answered prior to designing a volunteer program evaluation.
3. Understand the difference in purpose and value of four types of volunteer program evaluation techniques.
4. Identify key stakeholders who must be engaged in the creation/approval of the evaluation process and given the results derived from it.



General Notes to Trainer

1. This workshop is in a suggested format. Feel free, however, to personalize it with your own stories. Also, phrase questions and activities in a manner most attuned to your organization.
2. Although the focus of this module is designing a volunteer program evaluation, the skill is a generic one which may have broader applicability to the participants. Whatever position staff have within the organization, the skill of evaluating their work is crucial. Therefore, if the volunteer-related elements of this seminar do not have applicability for all staff, you might want to ask them to think in terms of evaluating any sort of program or project.
3. Most people have had some experience in establishing an evaluation system or taking part in evaluating a program. Having participants recall personal experiences of being asked to give feedback into an evaluation process will immediately begin to surface negative or positive memories, such as:
 - “I was asked to fill out a survey and never heard what they did with the information.”
 - “I didn’t want to answer truthfully as I did not trust what would happen to the information.”
 - “The results of the survey were given to us in a succinct summary format which we could digest easily. They invited any participants to be engaged in efforts to design goals to achieve some of the recommendations that surfaced in the evaluation.”
4. It is important to reiterate that this is a cursory overview of the subject of evaluation. If participants/staff/volunteers in the seminar need in-depth skill development on evaluation process, additional training will be necessary. You may also choose to give training or establish your organization’s evaluation system on just one or two of the four methods shared in this module.
5. After this initial training, you may want to establish an evaluation task force to determine what type of information your volunteer program needs and determine which types of evaluation might gain access to that information.
6. Because there are four concepts to cover, presentations and facilitation must be crisp and timed. If participants want more information, use this as an opportunity to ask for future training time on the topic.
7. The topic of individual performance assessment of volunteers may be one that could be paired with this module, thus exploring the full subject of evaluating the investment of volunteers, both individually and collectively within the program.
8. There are numerous resources on program assessment. Books and resources that I discovered to be particularly useful or applicable to evaluation of volunteer programs are mentioned under Resources at the end of this training module.



Presentation Overview

SLIDES/ HANDOUTS	SECTION	METHOD OF PRESENTATION	TIME
S-1 to 8	Introduction <ul style="list-style-type: none"> • Purpose of Workshop • Learning Objectives • Introductory Comments • Warm-up Exercise • 4 Key Concepts 	Presentation & Discussion	10 minutes
H-1			
S-9 to 13	Key Concept 1 Considerations before designing evaluation	Presentation & Discussion	10 minutes
H-2			
S-14-25	Key Concept 2 Three common types of evaluation	Presentation/Facilitated Discussion/Activity	15 minutes
H-3 (A, B and C)			
S-26 to 33	Key Concept 3 Impact Evaluation	Presentation & Dyad Exercise	10 minutes
H-4			
S-34 to 36	Key Concept 4 Disseminating Evaluation Results	Individual or group activity	8 minutes
H-5			
S-37	Summary/Wrap-up/ Evaluation	Brief Presentation	2 minutes
H-6			Total: 55 Minutes



Presentation Script

SLIDE/ HANDOUT	SECTION	TIME
S-1 to 3: Interviewing Activity	<p>Introduction</p> <ul style="list-style-type: none"> Summarize purpose and objectives of this seminar Share some introductory comments to include a working definition of volunteer program evaluation for purposes of this workshop/discussion: <i>Volunteer program evaluation is a process to determine the strengths, weaknesses, and impact of your volunteer program through use of appropriate instruments or techniques (e.g., survey, interviews, etc.) to gather this information.</i> <p>Optional Activity</p> <p>The purpose of the evaluation should be clear and plans made for distribution of results to appropriate stakeholders such as volunteers, paid staff, executive team, board members, funders, donors, and/or community members. Response to the data can come in the form of goals for the upcoming year, revision of some aspects of the volunteer system, expansion of ways to utilize volunteers, etc.</p>	10 minutes ▼
S-4: Warm Up Exercise	<p>Warm-up Exercise</p> <p>Ask the participants:</p> <p><i>What are some advantages you can see or have actually experienced from taking time to evaluate the success of volunteer engagement in your organization, unit, or department, or for yourselves as individuals?</i></p>	
S-5 to 6: Advantages to Evaluation	<p>You may wish to record responses (or have a recorder write them) on a flip chart. Participants will most likely mention some of the following observations:</p> <ul style="list-style-type: none"> The information gleaned can be used to set goals for volunteer involvement during a future designated time period. Evaluation helps to create buy-in from all who are involved in any aspect of the volunteer program, not just those individuals in charge of volunteer management for the organization. Evaluation serves as a way to educate staff and volunteers about what elements are involved in determining the success of a volunteer program. The results, if given to appropriate stakeholders, may stimulate/support needed changes. 	



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SLIDE/ HANDOUT	SECTION	TIME
<p><i>(continued)</i> S-5 to 6: Advantages to Evaluation</p>	<p><i>(continued)</i></p> <ul style="list-style-type: none"> • The results may aid in anticipating future concerns that can be worked on to avert significant future problems. • Carrying out an evaluation helps to build professionalism into the volunteer program. • Evaluations can help diffuse the negative feelings of some participants if the process does not find similar negative reactions to be held by many others within the organization. • Depending on the sophistication of the process used, an evaluation can help to analyze cost/benefits of the volunteer program to the organization (or any component of that organization). • Volunteer program evaluations are a great tool for a new staff person to use to objectively evaluate the current program and develop any needed changes. • Evaluations can gather various viewpoints from those involved in the delivery of the volunteer program, gaining a profile of the current program by getting the big picture. • The results can be the basis for a staff retreat to enhance the program. <p>If some of these benefits are not mentioned, you can fill in with your own observations of the advantages of volunteer program evaluation.</p> <p>Summarize the key learning of this exercise: <i>There are extensive values in performing an evaluation of a volunteer program.</i></p>	<p style="text-align: center;">▲</p> <p>(same 10 minutes)</p>
<p>S-7 to 8: 4 Key Concepts H-1: 4 Key Concepts</p>	<p>4 Key Concepts</p> <p>This training session is built on 4 Key Concepts.</p> <p>(Proceed through the slide, highlighting each concept in turn. Indicate that during the workshop each concept will be examined together with relevant material.)</p> <p>You may choose to distribute all handouts for this module at this time or hand them out when the topics are presented.</p>	



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SLIDE/ HANDOUT	SECTION	TIME
S-9: Key Concept 1	<p align="center">Key Concept 1</p> <p>Assessment begins with clearly determining what information you want, the best process to obtain that information, and which shareholders might be interested in the results.</p>	10 minutes ▼
<p>S-10 to 11: Preparation for Designing Volunteer Program Evaluation</p> <p>H-2: Questions and Decisions Prior to Administering the Evaluation</p>	<p>Presentation: No matter what you are trying to measure, the following general process/steps/questions are recommended to think about as you design your evaluation:</p> <ol style="list-style-type: none"> 1. For what purpose is the assessment/evaluation being done? (e.g., what do you want to decide as a result of the evaluation?) 2. What audiences will want this information? 3. Do we have the support/involvement of those who will be able to implement the results/suggestions arising from the evaluation? 4. What kinds of information are needed to make decisions and from whom do we need to gather that information? 5. What methods can we use to access such information? (e.g., survey, focus groups, interviews, random sampling, review of volunteer management systems, forms, etc.) 6. What roles will be taken and by whom to: <ul style="list-style-type: none"> • Develop/pilot test/approve the questions? • Carry out the tabulation/analysis/interpretation of results? • Present the material to the appropriate audiences? 	
S-12: Discussion Questions	<p>After presenting the above, ask participants: Have you ever carried out an evaluation and left out one of these six steps? What impact was there on the effectiveness/value of the evaluation?</p>	



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SLIDE/ HANDOUT	SECTION	TIME
S-13: Additional Issues	<p>If time allows, mention a few other key points that will impact the success of evaluation:</p> <ul style="list-style-type: none"> • Consider carefully how confidentiality will be handled. (Will participants sign their names? Will the report include only themes that surfaced in the evaluation, without including names? Will a third-party evaluator review the comments and not use individual names in the report? How safe is it to be honest?) • Has the organization/department/group determined the resources (finances, people, time) to carry out an evaluation, arranged to support the process, and agreed to consider recommendations coming from the evaluation? • Will the evaluation be performed by a member of the paid staff, an external consultant, or a volunteer with evaluation skills? • The size and culture of the organization or program will greatly impact the type of process chosen to obtain information. • Involve an evaluation task force to establish and monitor the process. • Again, make certain that those who are in a position to implement any recommendations coming from this process support the evaluation. 	<p style="text-align: center;">▲ (same 10 minutes)</p>
S-14 : Key Concept 2	<p style="text-align: center;">Key Concept 2</p> <p>The most common methods of gathering data for evaluating volunteer programs are:</p> <ul style="list-style-type: none"> • Evaluating Output Statistics • Exploring Customer Satisfaction • Comparison to Outside Standards <hr/> <p>Facilitated Presentation Describe each of these three methods and then ask any participant who has had experience with any of these methods to share the benefits/values or shortcomings. Add your own additional thoughts if the group does not have extensive experience with evaluation.</p>	<p style="text-align: center;">15 minutes ▼</p>



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SLIDE/ HANDOUT	SECTION	TIME
S-15: Preparation	<p>1. Evaluating Output Statistics This method measures the quantitative information about a volunteer program, such as the number of hours of service contributed by volunteers, number of clients served, and other items that can be counted or measured in a volunteer program. Other examples are:</p> <ul style="list-style-type: none"> • Dollar value of donated volunteer time (below see optional explanation of methods to determine this value)* • Numbers of volunteers serving in different capacities within an organization • Specifics about volunteers such as <ul style="list-style-type: none"> ○ ratio of male to female volunteers ○ Approximate percentage by age group ○ Percentage by ethnicity, education ○ Number employed elsewhere ○ Retention rates ○ Volunteers who give financial donations 	<p style="text-align: center;">▲ (same 15 minutes)</p>
S-16 : Methods of Computing the Value of Volunteer Hours	<p>(Optional Explanation)* Methods of computing the value of volunteer hours:</p> <ul style="list-style-type: none"> • Minimum Wage - Apply the established minimum wage to the total number of hours served by volunteers. This offers the lowest equivalency value (often much less than the level of service provided by volunteers) but even this minimal math comes to a large enough dollar figure to impress many. • Imputed Wage System - A Department of Labor figure (average per capita amount earned by a non-agricultural employee in US) calculated annually for use as a multiplier of the number of hours contributed by volunteers. The figure is reported on the Independent Sector Web site: http://www.independentsector.org/programs/research/volunteer_time.html The amount posted in 2006 was \$18.04/hour. • Equivalent Wage System - Calculating an equivalent value of each volunteer assignment to a paid job classification, even adding fringe benefit costs. 	



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SLIDE/ HANDOUT	SECTION	TIME
S-17: Benefits	Potential Benefits: <ul style="list-style-type: none"> • Change in numbers or kinds of volunteers in your program • Information for volunteer insurance • Percentage of volunteers who are giving financial support to the organization 	▲ (same 15 minutes)
S-18: Shortcomings	Potential Shortcomings: <ul style="list-style-type: none"> • The number of hours does not deal with impact or quality of the work donated. • There are many other quantity markers beyond “hours served” that would be useful such as: sources of new volunteers, average length of service, numbers of clients assisted, range of jobs performed by volunteers, etc. 	
S-19: Customer Satisfaction H-3 (a, b, c): Sample Customer evaluation forms	2. Exploring Customer Satisfaction The second common method of evaluation is to ask customers of the volunteer program – which may include paid staff, volunteers, the executive management team, clients, funders, the community, or others – their qualitative perception of the value of the volunteer program. The most common methods of gaining this information are through surveys, interviews, or focus group discussions.	
S-20: Benefits	Potential Benefits: <ul style="list-style-type: none"> • Satisfaction from customers greatly impacts the success of the volunteer program. • Determines major weaknesses and strengths in the program from the perspective of customers. • Gains buy-in from staff for volunteer program. • Is a great form of volunteer appreciation. • Others. 	
S-21: Shortcomings	Potential Shortcomings: <ul style="list-style-type: none"> • Answers not accurate if there are organization trust issues. • Must prepare those taking the survey regarding reasons for the survey and what you will do with results/recommendations • Others. 	



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SLIDE/ HANDOUT	SECTION	TIME
S-22: Activity	Activity: Have participants look over examples of this type of evaluation (H-3 A, B, C) <ul style="list-style-type: none"> • What are the benefits and shortcomings of each example? • Which questions would you keep or discard for your organization and what others would you add? Why? 	▲ (same 15 minutes)
S-23: Comparison H-4: Factors in Considering	3. Comparison to Outside Standards The third common method of volunteer program evaluation is comparison of the program to objective management standards created by an outside body or authority. Examples of such standards are: Energize's <i>Volunteer Management Audit</i> , the Canadian Code, Points of Light Paradigm Project and Volunteer Program Evaluation. (Ordering information is found under Resources in this module.)	
S-24: Benefits	Potential Benefits: <ul style="list-style-type: none"> • Education of excellence in standards of volunteer management. • Identification of areas of weakness that may be greatly impacting your program. • Gives information that will help you develop goals for improving the program. 	
S-25: Shortcomings	Potential Shortcomings: <ul style="list-style-type: none"> • Takes dedication/time. • Not helpful if no action occurs after you identify areas needing improvement. • May be challenging to compare your program to a set of generic standards. 	
S-26: Key Concept 3	Key Concept 3 The ultimate information to derive from Volunteer Program Evaluation is the impact that the volunteer program is having on the mission of the organization.	10 minutes ▼
S-27: Impact Evaluation	The focus of outcome-based or impact evaluation is a focus on results, not merely activities. The main question asked is: What has changed in the lives of individuals, families, organizations, or the community as a result of this program (the "So-what?" question)?	



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SLIDE/ HANDOUT	SECTION	TIME
S-28: Impact Evaluation	<p>Optional: Section on Outcome-based evaluation system and Its Challenges:</p> <p>Outcome-based System: Developing an outcomes-based evaluation system includes potentially discovering:</p> <ul style="list-style-type: none"> • Will a target group/focus of the organization change? (e.g., teenage girls, the wetlands, public housing) • What about the target/focus will change and in what direction will it change? (e.g., teenage girls will have a lower rate of pregnancy; the wetlands will increase in size to accommodate migrating birds; public housing will be safer) • What will happen to create that change? (e.g, volunteer mentor will be assigned to high-risk teenage girls; volunteer committee will create an education campaign; community and public housing resident volunteers will set new standards) • How will the change be identified and tracked? • How will the change be measured? • How will we know that our service is what impacted the change? • How long must the change remain in effect before being considered successful? 	<p style="text-align: center;">▲</p> <p>(same 10 minutes)</p>
S-29: Challenges	<p>Challenges of Impact Evaluation There are attempts to demonstrate the impact that volunteers have on the mission/clients/service/organization and on the volunteer themselves. Researchers are designing complex equations to use in this process. None, to date, are without result flaws and all are very demanding in terms of time. Few, if any, organizations are in a position to truly carry them out. In reality we can't strictly evaluate the exact impact of a volunteer who supports a family in hospice, visits Alzheimer's patients in the hospital, or raises money for a myriad of organizations. But in some cases we can measure discrete planned change in the recipients of volunteer service in such areas as:</p> <ul style="list-style-type: none"> • Knowledge gain • Values altered • Behavioral adjustment • Attitude change • Alteration in social or economic status 	



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SLIDE/ HANDOUT	SECTION	TIME
<p>(continued) S-29</p>	<p>(continued)</p> <ul style="list-style-type: none"> • Improved skills • Client reaching set goals • Mood, stress reduction <p>If we can gain the knowledge of any of the above changes, we can indicate that volunteers were involved but we can't say that they, alone, were the cause of these changes, only that they contributed to them. However, that information is far more powerful than simply saying that we had 36 volunteers contributing 900 hours to our organization - which says NOTHING about impact.</p>	<p style="text-align: center;">▲</p> <p>(same 10 minutes)</p>
<p>S-30 to 32: Examples</p>	<p>Let's look at one example:</p> <p style="text-align: center;"><i>The mission of the mentoring program is to keep high-risk students out of gangs and involved in further education.</i></p> <p>There are a number of ways you might attempt to describe impact. As you consider each below, ask yourself: <i>So what?</i> To whom might this matter? Is this really evidence of something important?</p> <ul style="list-style-type: none"> • We had 90 volunteers working on the mentor project for three months. (So what?) • The volunteers mentored high-risk students at the continuation high school. (So what?) • Most students reported liking their mentor. (So what?) • Most students began to turn in their homework more regularly. (So what?) • The students began to develop more pride in their work and began to get passing grades. (So what?) • As a result of receiving better grades, many were able to transition back into regular high school. (So what?) • 59% of high-risk students being mentored for a minimum of three months by a caring adult tested higher on standardized tests, got after-school jobs that they had kept for two months, and were expressing interest in additional education to prepare them for the work world. (So what?) • It has been statistically shown that students who are able to keep an after-school job and are motivated to get additional training/education for future employment have a 70% less chance of breaking the law and becoming dependent on drugs and involved with street gangs. (OH, WOW, GREAT!!! So that is the impact! I would love to be involved and/or support that program!) 	



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SLIDE/ HANDOUT	SECTION	TIME
S-33: Activity	<p>Activity in Dyads: One person explains the impact of some volunteer work on the mission of the organization. The second person keeps asking, “So what?” until both are satisfied that they understand the impact of the volunteer work being done.</p> <p>Note: Work continues to be done in the arena of impact evaluation of volunteer engagement. It is an imperfect science, but the future will require more effort on our part to be able to demonstrate the <i>impact</i> volunteers have, not simply numbers and quantitative activities.</p>	<p>▲ (same 10 minutes)</p>
S-34: Key Concept 4	<p>Key Concept 4 After data and impact of volunteer activity is measured, effectively communicate these to significant stakeholders.</p>	<p>8 minutes ▼</p>
<p>S-35: Communicating to Stakeholders H-5: Worksheet of Stakeholders</p>	<p>Who needs the information? Depending on the purpose of the evaluation, different stakeholders may have an interest in or a need to know the results. Ask participants: <i>Who are some stakeholders that may have a need to know or an interest in the results of the evaluation?</i></p> <p>Add to answers, if not given:</p> <ul style="list-style-type: none"> • Volunteers who participated in the evaluation will want to know the results and also what is planned in response to the themes that developed from the surveys, etc. Volunteers also are always pleased to know the impact of the work they do. It is vital to constantly give volunteers feedback on the difference they are making. In fact, one way to show that volunteers are making a difference is to measure, assess, and appreciate their work. • Paid staff who are involved in the volunteer program should see any collective themes that may involve them. Weaknesses and strengths of the program should be shared with them, as staff will need to be involved in the recommendations for improvement. The entire organization must be on board. • Executive Team or Executive Director and Board should be involved in “blessing” the evaluation process and in supporting recommendations that are derived from it. These folks care deeply about enhancing the work of achieving the mission. The volunteer component is or can be a significant factor in accomplishing/ enhancing the work towards the mission. 	



“Thumbnail” View of Slides

Training Busy Staff
to Succeed with Volunteers:
The 55-Minute Training Series

*Volunteer Program
Evaluation*

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Purposes of this Session

- ▶ Identify the steps needed to establish a volunteer program evaluation.
- ▶ Explore 4 types of volunteer program evaluation.
- ▶ Learn to identify significant stakeholders who need results of the evaluation communicated to them.

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Learning Objectives

- ▶ Discuss the purpose and values of carrying out a volunteer program evaluation.
- ▶ Identify key steps and questions to be answered prior to designing a volunteer program evaluation.
- ▶ Understand the difference in purpose and value of 4 types of volunteer program evaluation techniques.
- ▶ Identify key stakeholders who must be engaged in the creation/approval of the evaluation process and given the results derived from it.

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Definition

- ▶ Volunteer program evaluation is a process to determine the strengths, weaknesses, and impact of your volunteer program through use of appropriate instruments or techniques to gather this information.

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Warm-up Exercise

- ▶ What are some advantages to evaluating the success of the volunteer program in your organization, unit, department, or for yourselves as individuals?

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Advantages to Evaluation

- ▶ Can be used to set goals for future volunteer involvement.
- ▶ Creates buy-in from all who are involved in any aspect of the volunteer program.
- ▶ Can educate staff and volunteers about the elements of a successful volunteer program.
- ▶ If given to appropriate stakeholders, may stimulate/support needed changes.
- ▶ May anticipate future concerns that can be worked on to avert significant future problems.

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Advantages to Evaluation

- ▶ Builds professionalism into the volunteer program.
- ▶ Can help diffuse negative feelings.
- ▶ Can analyze cost/benefits of the volunteer program.
- ▶ Great tool for a new staff person.
- ▶ Gathers various viewpoints from those involved in the delivery of the volunteer program.
- ▶ Gains a profile of the current program: the big picture.
- ▶ Can be the basis for a staff retreat to enhance the program.

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*4 Key Concepts of
Volunteer Program Evaluation*

1. Assessment begins with clearly determining what information you want, the best process to obtain that information, and which stakeholders might be interested in the results.
2. The most common methods of gathering data for evaluating volunteer programs are:
 - Evaluating Output Statistics
 - Exploring Customer Satisfaction
 - Comparison to Outside Standards

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*4 Key Concepts of
Volunteer Program Evaluation*

3. The ultimate information to derive from Volunteer Program Evaluation is the impact the volunteer program is having on the mission of the organization.
4. After data and impact of volunteer activity is measured, effectively communicate these to significant stakeholders.

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Key Concept 1

Assessment begins with:

- ▶ clearly determining what information you want,
- ▶ the best process to obtain that information, and
- ▶ which stakeholders might be interested in the results.

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*Preparation for Designing
Volunteer Program Evaluation*

- ▶ For what purpose is the evaluation being done? What do you want to be able to decide as a result of the evaluation?
- ▶ Who are the audiences that will want this information?
- ▶ Do we have the support of those who will be able to carry out the suggestions arising from the evaluation?

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*Preparation for Designing
Volunteer Program Evaluation*

- ▶ What kinds of information are needed to make decision and from whom do we need to gather that information?
- ▶ What methods can be used to access that information?
- ▶ What roles will be taken and by whom to:
 - Develop/pilot test/approve the questions.
 - Carry out the tabulation/analysis/interpretation of the results.
 - Present the material to appropriate audiences.

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“Thumbnail” View of Slides (continued)

Discussion Question

- ▶ Have you ever carried out an evaluation and left out one of these 6 steps? What impact was there on the effectiveness/value of the evaluation?

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Additional Issues to Consider

- ▶ How confidentiality will be handled.
- ▶ Do you have the necessary resources to carry out an evaluation?
- ▶ Who will lead the process?
- ▶ How you obtain information will be impacted by the size and culture of your organization.
- ▶ Always involve a task force to carry out the evaluation.
- ▶ Make certain that those who are in a position to carry out the recommendations are in support of the evaluation.

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Key Concept 2

- ▶ The most commonly used methods of gathering data for evaluating volunteer programs are:
 - Evaluating Output Statistics
 - Exploring Customer Satisfaction
 - Comparison to Outside Standards

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Evaluating Output Statistics

- ▶ This method measures quantitative information about a volunteer program:
 - Numbers of volunteers, hours, clients served, etc.
 - Dollar value of donated time
 - Numbers of volunteers serving in different capacities
 - Specifics about volunteers, such as: gender, age, ethnicity, education, etc.
 - Percentage of volunteers who also gave financial donations

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Methods of Computing the Value of Volunteer Hours

- ▶ **Minimum Wage**
 - Lowest equivalency
- ▶ **Imputed Wage System**
 - Department of Labor figure calculated annually in the US by Independent Sector
- ▶ **Equivalent Wage System**
 - Calculating cost of equivalent paid job classifications, plus fringe benefits.

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Output Statistics - Potential Benefits

- ▶ Change in numbers or kinds of volunteers in your organization.
- ▶ Information for volunteer insurance purposes.
- ▶ Volunteers who are giving financial support to the organization.

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Output Statistics - Potential Shortcomings

- ▶ Numbers do not deal with impact or quality of the work donated.
- ▶ There are many other quantity markers beyond “hours served” that would be useful such as:
 - Sources of new volunteers
 - Average length of service
 - Numbers of clients assisted
 - Range of jobs performed by volunteers

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Exploring Customer Satisfaction

- ▶ Asking for feedback from your “customers”
 - Paid staff
 - Volunteers
 - Executive management
 - Clients (if appropriate)
 - Funders
 - Community
- ▶ Qualitative information elicited by:
 - Surveys
 - Interviews
 - Focus groups

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Customer Satisfaction - Potential Benefits

- ▶ Satisfaction from customers greatly impacts the success of the volunteer program.
- ▶ Determines major weaknesses and strengths in the program from perspective of customers.
- ▶ Gains buy-in from staff for volunteer program
- ▶ Great form of volunteer appreciation.

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Customer Satisfaction - Potential Shortcomings

- ▶ Answers not accurate if there are organizational trust issues.
- ▶ Must prepare those taking the survey regarding reasons for survey and what you will do with the results/recommendations.

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Activity

- ▶ Look over the examples of customer surveys in Handout #3.
- ▶ What are the benefits and shortcomings of each example?
- ▶ Which questions would you keep or discard for your organization and what others would you add? Why?

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Comparison to Outside Standards

- ▶ Comparison to objective management standards created by an outside body or authority.
- ▶ Examples of such standards:
 - *The Volunteer Management Audit* (Energize, Inc.)
 - *The Canadian Code for Volunteer Programs* (Volunteer Canada)
 - *Points of Light Paradigm Project and Volunteer Program Evaluation*

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“Thumbnail” View of Slides (continued)

Comparison to Standards – Potential Benefits

- ▶ Education of excellence in standards of volunteer management.
- ▶ Identification of areas of weakness that may be greatly impacting your program.
- ▶ Gives you information that will help you develop goals for improving the program.

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Comparison to Standards – Potential Shortcomings

- ▶ Takes dedication/time.
- ▶ Not helpful if no action occurs after you identify areas needing improvement.
- ▶ May be challenging to compare your program to a set of generic standards.

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Key Concept 3

- ▶ The ultimate information to derive from Volunteer Program Evaluation is the **impact** that the volunteer program is having on the mission of the organization.

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Impact or Outcome-Based Evaluation

- ▶ Focuses on **results** – not just activities.
- ▶ Question asked is: *What has changed in the lives of individuals, families, organizations, or the community as a result of this program?*
- ▶ Keep asking: **“So what?”**

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Impact or Outcome-Based Evaluation

- ▶ An outcome-based evaluation discovers:
 - What target groups will change?
 - What about the target will change and in what direction will it change?
 - What will happen to create that change?
 - How will the change will be identified and tracked?
 - How will the change will be measured?
 - How will we know that our service is what impacted the change?
 - How long must the change remain in effect before being considered successful?

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Challenges of Impact Evaluation

- ▶ Some attempts and research tools to demonstrate the impact of volunteers.
- ▶ None, to date, are without result flaws and all are very demanding in terms of time.
- ▶ We can't strictly evaluate the exact impact of a volunteer, but in we can measure discrete planned change in the recipients of volunteer service in
 - Knowledge gain
 - Values altered
 - Behavioral adjustment
 - Attitude change
 - Improved skills
 - Client reaching set goals
 - Alteration in social or educational status reduction

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Example

- ▶ *The mission of the mentoring program is to keep high-risk students out of gangs and involved in further education.*
- ▶ To describe the impact of the mentoring volunteers, begin to describe the program. For each statement, ask: **So what?**
 - *To whom might this matter?*
 - *Is this really evidence of something important?*

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Example, continued

- ▶ We had 90 volunteers working on the mentor project for 3 months. (So what?)
- ▶ The volunteers were mentoring high risk students at the continuation high school. (So what?)
- ▶ Most students reported liking their mentor. (So what?)
- ▶ Most students began to turn in their homework more regularly. (So what?)
- ▶ The students began to develop more pride in their work and began to get passing grades. (So what?)
- ▶ As a result of receiving better grades, many were able to transition back into regular high school. (So what?)

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Example, continued

- ▶ 59% of high risk students being mentored for a minimum of 3 months by a caring adult tested higher on standardized tests, got after-school jobs that they had kept for 2 months, and were expressing interest in additional education to prepare them for the work world. (So what?)
- ▶ It has been statistically shown that students who are able to keep an after school job and are motivated to get additional training/education for future employment have a 70% less chance of breaking the law and becoming dependent on drugs and involved with street gangs.
 - **OH, WOW, GREAT!!! So that is the impact! I would love to be involved and/or support that program!**

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Activity

- ▶ Find a partner.
- ▶ One person explains the impact of some volunteer work on the mission of the organization.
- ▶ The other person keeps asking, **“So what?”** until both of you are satisfied that you understand the impact of the volunteer work being done.

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Key Concept 4

- ▶ After data and impact of volunteer activity is measured, effectively communicate these to significant stakeholders.

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Communicating to Stakeholders

- ▶ Who needs the information?
 - Volunteers
 - Paid Staff
 - Executive Team or Executive Director
 - Board
 - Clients
 - Funders
 - The Community

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“Thumbnail” View of Slides (continued)

Activity

- ▶ What is your experience with volunteer program evaluations?
- ▶ How might you establish an evaluation system for whatever involvement you have with the volunteer program?
- ▶ To whom would you give the results of that evaluation to help improve the program in your area and/or in the larger organization?

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Summary

- ▶ Answer key questions before designing your evaluation.
- ▶ Select the appropriate method(s) to access the information needed:
 - Statistical Outputs
 - Customer Satisfaction
 - Standards-based evaluation
 - Impact/Outcome Evaluation
- ▶ Share Information with key stakeholders.
 - Summary of key findings
 - Complete report on results and recommendations

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Suggestions for Expanded Activities for Sessions over 55 Minutes:

1. An alternative warm-up exercise would be sharing positive and negative personal experiences with setting up and/or sharing information/opinions in an evaluation process.
2. You may want to plan a 15-minute teaser at a staff meeting, where you pose the question of what potential values can be derived from a volunteer program evaluation. The seminar would follow at a different time.
3. With extra time, encourage participants to outline the questions, process, and stakeholders who will need to be engaged in design and support of a volunteer program evaluation.
4. If you have a three-hour time period to cover this topic, take each of the four methods of evaluating a volunteer program and determine what types of questions/information/standards you would use in each type of evaluation of your volunteer program. A smaller task force could take the best ideas from this session and design your volunteer program evaluation process.
5. You may want to recruit a university student (preferably a graduate student) from a class or major field of study focusing on evaluation. She/he could use your organization as a part of his/her class work or thesis.
6. Impact evaluation is growing in significance. If you do not have a person who is familiar with this (imperfect) process, you might be able to recruit a volunteer from a corporation who could help design a way to give you more impact information.
7. Have session participants list everyone who needs to be involved in designing/approval of the volunteer evaluation process and all stakeholders who must receive/act on the results.
8. Talk about how a volunteer evaluation process could work in your specific organization/department.
9. Take some extra time to play the "So what?" game with as many participants as feasible. This exercise helps people begin to realize how to state what they are trying to measure when they are looking at the real impact of the volunteer program on the mission of the organization or in accomplishing specific goals.



Suggested Resources on Volunteer Program Evaluation

Books

- Eystad, Melissa. Editor. *Measuring the Difference Volunteers Make: A Guide to Outcome Evaluation for Volunteer Program Managers*. MN Dept. of Human Services, 1997.
Free download at <http://www.energizeinc.com/art/subj/prog.html> .
- Ellis, Susan J. *Volunteer Management Audit*. Philadelphia: Energize, Inc., 2003. Order at <http://www.energizeinc.com/bookstore.html> .
- McCurley, Steve and Sue Vineyard. *Measuring Up: Assessment Tools for Volunteer Programs*. Darien, IL: Heritage Arts, 1997. Order at <http://www.energizeinc.com/bookstore.html> .
- McCurley, Steve and Rick Lynch. "Measuring Volunteer Program Effectiveness." Chapter 15 in *Volunteer Management: Mobilizing all the Resources in the Community*. Kemptville, ON: Johnstone Training and Consultation, Inc., 2006. Order at <http://www.energizeinc.com/bookstore.html> or <http://www.volunteertoday.com/> .
- McDuff, Nancy and other internationally recognized authorities on volunteerism. *The Volunteer Program Evaluation Series*. Order at <http://www.volunteertoday.com/> .
- Points of Light Foundation. *Changing the Paradigm Self-Assessment Kit*. Washington, DC: Points of Light Foundation, 1992. Order at <http://www.amazon.com> .
- Quarter, Jack. Laurie Mook, and Betty Jane Richmond. *What Counts: Social Accounting for Nonprofits and Cooperatives*, 2nd ed. Sigel Press, 2007. Order at <http://www.sigelpress.com/> or <http://www.energizeinc.com/bookstore.html> .

Articles

- Graff, Linda. "A Note on Assessing Value." <http://www.energizeinc.com/art/abeso.html> .



Handout 1

The 4 Key Concepts of Volunteer Program Evaluation

1. Assessment begins with clearly determining what information you want, the best process to obtain that information, and which stakeholders might be interested in the results.

2. The most commonly used methods of gathering data for evaluating volunteer programs are:
 - Evaluating Output Statistics
 - Exploring Customer Satisfaction
 - Comparison to Outside Standards

3. The ultimate information to derive in volunteer program evaluation is the impact the volunteer program is having on the mission of the organization.

4. After data and impact of volunteer activity is measured, effectively communicate these to significant stakeholders.



Handout 2

Volunteer Program Evaluation:

Questions and Decisions Prior to Administering the Evaluation

Introduction

The most important part of evaluating your program occurs months before, when you start the work being assessed: You must **SET GOALS** to **ACHIEVE!** If you do not know what you were trying to do, how can you assess if you accomplished it?

The second most significant activity is to gain the approval and support of anyone who will be in a position of supporting the results (Executive Director, Department Manager, Board, etc.).

The third most important part of evaluation occurs at your desk. **PLANNING** is the key to useful and valid evaluation. Don't do this alone. Form an **EVALUATION** Task Force to help you from the beginning to reach decisions on the following considerations:

1. **Audience:** For whom are you developing this evaluation? To whom will the results be reported? Are there several "audiences" (funding sources, agency administrators, government officials, etc.)?
1. **Evaluation Objectives:** What exactly do you want to learn about your program? The better you are at pinpointing what you need to know, the better you will be at asking questions that get at the necessary answers. Also, you cannot evaluate everything at once, so you must prioritize your concerns.
2. **Choose Data Sources:** Who will participate in your evaluation? Who has the best answers? Among your choices could be:
 - Volunteers: Active and/or inactive
 - Employees: Those who supervise volunteers and /or those who don't
 - Administrators and Board Members
 - Clients/Consumers: Present and/or past
 - The general public and/or Special Target Communities
 - Other Related Service Agencies
 - You
 - Written sources: Census data, annual reports, previous evaluations

Your choice of data sources will be determined by your evaluation objectives and design. You will also have to decide whether and how to sample your sources if they number more than 100 people.

(continued)



Questions and Decisions Prior to Administering the Evaluation

3. **Collection Logistics:** How are you going to get your answers and collect your data? Will you utilize written questionnaires (postal mailed or e-mailed), individual interviews, focus group meetings? Who will help you ask the questions? Who will help you interpret the answers? Where and when will all this happen?
4. **Design Your Questions:** Take time to word your questions carefully: neutral language, measurable and comparable response choices, the right length, etc. Get expert help if necessary.
5. **Measurement and Analysis Plan:** How will you assure that the answers you receive are comparable and measurable? How will you assure that you correctly interpret the data you receive? How will you report your findings to your “audience?”
6. **Pilot Test:** Try out your design on a few people, preferably some who know nothing about your planning. Are you getting the answers you expected? Answers that are useful? If not: revise!

This handout is adapted with permission from a handout by Susan J. Ellis, Energize, Inc., 2005.



Handout 3

Assessment of Volunteer Program and Staff Training Needs

Staff Input

This survey is part of the agency plan to enhance our organization’s delivery of services to our clients. The information you share will assist in the design of an in-service training for staff and lead volunteers who work directly with volunteers to carry out our mission. Your thoughtful and honest response will allow us to design the training as specific and useful to your concerns and issues as possible. The individual information will be kept confidential but collective themes and recommendations will be utilized in proposing training topics and methods. Thank you for your assistance.

Agree _____ Disagree

1. The time and effort I invest in supervising volunteers is well worth it because of the benefits accrued from volunteer service. _____
2. Volunteer participation enables me to perform activities/tasks I would not otherwise be able to do. _____
3. Volunteers are well oriented towards an understanding of my priorities, concerns, frustrations, etc., as a staff person. _____
4. In general, volunteers are qualified for their positions in our organization. _____
5. I feel recognized and rewarded by the organization for my efforts with volunteers. _____
6. I think that I possess the necessary skills to manage volunteers. _____
7. I would feel more competent in my involvement with volunteers if I received:
 - stronger orientation to the volunteer program _____
 - written information on the volunteer program _____
 - other (list) _____



Handout 3(continued)

Assessment of Volunteer Program and Staff Training Needs

Staff Input

Rate Your Proficiency with These Skill Areas in Managing Volunteers

Strong _____ **Average** _____ **Weak**

Designing Positions for Volunteers _____

Volunteer Recruitment _____

Interviewing and Screening _____

Volunteer Motivation _____

Supervising Volunteers _____

Orienting and Training Volunteers _____

Delegating to Volunteers _____

Mutual Performance Reviews _____

Handling Volunteer Performance Problems _____

Volunteer Program Evaluation _____

Risk Management _____

Volunteer Recognition _____

What do you see as the major problems or barriers to utilizing volunteers more effectively in our organization?

Please elaborate on any specific concerns/requests that you would like to see addressed in volunteer management training for staff and volunteer leaders in our organization.

Name _____

Position _____



Handout 3(continued)

Assessment of Volunteer Program and Staff Training Needs

Administration Input

It is important in designing a staff training program in volunteer management that we have your perspective, commitment and thoughts to guide us. I will look forward to discussing these questions with you at a convenient time or, if you prefer, you can answer the questions in writing prior to our meeting. Thank you for your leadership in ensuring high quality services to our clientele through our staff/volunteer teams.

1. When hiring staff, is consideration given to their experience, motivation, and skills in working with volunteers?
2. Do you think that the role of staff in supervising volunteers is clearly defined in our organization? If yes, how is this accomplished?
3. Are staff evaluated as to their work with volunteers in the organization? If yes, how is this accomplished?
4. In what ways are staff rewarded for excellence in working with volunteers? Any new ideas?
5. Do you think that staff training in volunteer management principles is important to enhancing our readiness to effectively utilize volunteers?



Handout 3(continued)

Assessment of Volunteer Program and Staff Training Needs

Administration Input

6. How could we enhance our orientation to new staff in order to give more information and review expectations about our volunteer program?

7. What is your philosophy on training of staff, board, and lead volunteers to be better equipped to work with volunteers?

8. In your opinion, is the Board of Directors given adequate orientation and updates on the volunteer program of our organization?

9. What is a realistic expectation of the level of support for staff training in working with volunteers (e.g., resources such as books and tapes on volunteer management, access to staff for training, time for volunteer manager to prepare and deliver the training)?

Name_____

Position_____



Handout 3(continued)

Assessment of Volunteer Program

Volunteer Input

This survey is part of the agency plan to enhance our organization's delivery of services to our clients. The information you share will assist in the design of in-service training for staff and leadership volunteers who work directly with volunteers to carry out our mission. We would appreciate your thoughtful and honest response. Your individual information will be kept confidential but collective themes and recommendations will help guide efforts towards a new training program. Thank you for your assistance.

Name (optional) _____

1. In what positions have you volunteered at our organization?

2. Have you found your volunteer work to be interesting, challenging, fun?

Comments:

3. Did you receive sufficient orientation prior to volunteering with us?

Comments:

4. How would you characterize the supervision given to you by staff or leadership volunteers at our organization?

5. Do you think that your time and talents are well suited to the volunteer position that you hold (held)? Comments:



Handout 3(continued)
Assessment of Volunteer Program
Volunteer Input

6. Do (did) you feel sufficiently trained/coached in your volunteer job?

Comments:

7. Do you feel well appreciated by the organization, staff, clients, other volunteers?

Comments:

8. What are the volunteer program's greatest strengths/weaknesses?

Strengths:

Weaknesses:

9. What suggestions do you have for improving the volunteer program?



Handout 4

Factors to Consider in Impact Analysis of Volunteer Programs

There are attempts to demonstrate the impact that volunteers have on the mission/clients/service/organization and on the volunteer themselves. Researchers are designing complex equations to use in this process. None, to date, are without result flaws and are very demanding in terms of time. Few, if any, organizations are in a position to truly carry them out. In reality we can't strictly evaluate the exact impact on the value of a volunteer who supports a family in Hospice, visits Alzheimer's patients in the hospital, or raises money for a myriad of organizations. But in some cases, we can measure discrete planned change in the recipients of volunteer service in such areas as:

- **Knowledge gain**
- **Values altered**
- **Behavioral adjustment**
- **Attitude change**
- **Alteration in social or economic status**
- **Improved skills**
- **Client reaching set goals**
- **Mood, stress reduction in clients**

If we can gain the knowledge of any of the above changes, we can indicate that volunteers were involved but we can't say that they, alone, were the cause of these changes, only that they contributed to them. However, that information is far more powerful than simply saying that we had 36 volunteers contributing 900 hours to our organization – which says NOTHING about impact.

True outcome-based evaluation includes determining:

- What target groups will change
- What about the target will change and in what direction will it change
- What will happen to create that change
- How the change will be identified and tracked
- How the change will be measured
- How the change will be causally lined to the service being provided
- How long the change must remain in effect before being considered successful

(continued)



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To extend our knowledge of the above information still leaves some unanswered questions: What other forces may have had impact on the above changes? What are the ultimate and long-range changes/impacts of this intervention?

ADVICE in improving your reporting of impact:

- Begin to think in terms of why volunteers are placed in positions. Report both the activities and, as accurately as possible, the outcomes of their work.
- Because volunteer engagement is costing more to implement due to the shorter nature of time given and risk management issues, it is important to evaluate, as best possible, the cost/benefit to engaging volunteers. Boards of Directors, funders and others are beginning to ask these questions.

You may find that some volunteer positions may cost the organization more than they benefit, from a financial point of view; it is necessary to either point out the tremendous value to clients in having this activity performed, or adjust or eliminate the position.

- Incorporate, as able, new methods of using impact evaluation of volunteer programs. United Way of America continues to do work in this area, as does the independent sector and individual researchers from universities around the world.
- There may NEVER be a completely accurate method to determine the impact of volunteer activities. But giving key stakeholders the best impact information will greatly enhance your program in their eyes. Frequently, volunteers initiate new programs or have a particularly strong impact on the life of a client. Write up these “stories.” Statistics are interesting and have value for you in improving your program and reaching your goals but impact stories/statistics are what will keep support coming into your program.
- Set goals in your volunteer program that can be measured. Example: In a women’s job re-entry program, the report covered how many women reached the goals they set for themselves as they entered the internship – rather than the impact being only a report of how many women got on-going jobs. The ultimate goal of the program was to empower women to re-enter the job market but there were intermediate steps to measure along the way to determine impact.
- Determine other values that are rarely measured in volunteer programs, such as the aggregate funds contributed by volunteers, the value of in-kind contributed or accessed by volunteers, the number of volunteers recruited by existing volunteers.



Handout 5

Worksheet of Stakeholders for Evaluation Results

Which of the following stakeholders need to receive results of your volunteer program evaluation? In what format should the results be?

Stakeholders	Best Format for Evaluation Results
Volunteers	_____
Staff	_____
Board of Directors	_____
Executive Management Team	_____
Press	_____
Funders	_____
Others	_____



Participant Evaluation Form

Thank you for taking the time to share your evaluation of today's seminar. Your critique is valued and will be considered as we continually strive to improve our support to all personnel who team with volunteers.

1. Check the appropriate box to indicate whether you **met**, **partially met**, or **did not meet** the following learning objectives for this workshop:
 - a. Discuss the purpose and values of carrying out a volunteer program evaluation.
 met *partially met* *did not meet*
 - b. Identify key steps and questions to be answered prior to designing a volunteer program evaluation.
 met *partially met* *did not meet*
 - c. Understand the difference in purpose and value of 4 types of volunteer program evaluation techniques.
 met *partially met* *did not meet*
 - d. Identify key stakeholders who must be engaged in the creation/approval of the evaluation process and given the results derived from it.
 met *partially met* *did not meet*

Comments:

2. This session was:

- | | | |
|--------------|------------------------------|-----------------------------|
| Helpful: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Provocative: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Practical: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Well-paced: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too short: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too long: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |

Comments:



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The 55-Minute Training Series – Evaluation Form

Participant Evaluation Form (continued)

3. This trainer was:

- Knowledgeable: YES NO
Prepared: YES NO
Organized: YES NO
Enthusiastic: YES NO
Good discussion facilitator: YES NO

Comments:

4. In what ways can you utilize this material in your work?

5. What, if anything, do you plan to do differently as a result of this training?

6. What additional information on this or any other topic dealing with volunteers would be helpful to you in your work?

7. What suggestions do you have to strengthen this workshop?

8. Further comments or suggestions:

NAME (optional) _____



Training Busy Staff to Succeed with Volunteers:
The 55-Minute Training Series – Evaluation Form

Participant Evaluation Form (continued)

3. This trainer was:

- Knowledgeable: YES NO
Prepared: YES NO
Organized: YES NO
Enthusiastic: YES NO
Good discussion facilitator: YES NO

Comments:

4. In what ways can you utilize this material in your work?

5. What, if anything, do you plan to do differently as a result of this training?

6. What additional information on this or any other topic dealing with volunteers would be helpful to you in your work?

7. What suggestions do you have to strengthen this workshop?

8. Further comments or suggestions:

NAME (optional) _____

Training Busy Staff to Succeed with Volunteers: *The 55-Minute Training Series*

PowerPoint® Slides

To open the attached PowerPoint slides,
double-click the thumbtack icon below.



Trainer's Guide for Presenting... *Risk Management* *in* *Volunteer Programs*

Betty Stallings

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Energize, Inc.



Risk Management in Volunteer Programs

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Trainer's Guide for Presenting the *Risk Management in Volunteer Programs* Module

Introduction to Risk Management in Volunteer Programs

As with all good volunteer management principles, risk management policies, procedures, and practices should be integrated into every aspect of a community service organization. Although much of the analysis and policy development goes on at the board and administrator level of the organization, the overall effectiveness is only as good as the staff and volunteers who carry it out.

Contrary to popular belief, risk management is not only about purchasing insurance or avoiding lawsuits; it is about protecting and conserving all of your organization's resources (people and money), thus freeing it to pursue its important mission. Every threat of an accident, legal violation, financial loss, and lawsuit is a risk which can ultimately keep your organization from achieving its mission.

Many organizations prefer to keep their fingers crossed and their heads in the sand, hoping that they will avoid any unpleasant surprises. There are, undoubtedly, tough philosophical and legal issues to deal with: "Do we scale back important services that expose us to a high level of risk?" "Can we do anything to diminish the risk?" "How can we know that we are operating in a safe fashion? How safe is safe?" All of these important issues must be dealt with on an agency-by-agency basis, in consultation with expert legal and insurance advisors.

It is important for the leader of the volunteer program to have a risk management mindset to guide the organization through the process as it relates specifically to volunteers. This mindset accepts some degree of uncertainty, while at the same time provides recommendations for policies and procedures to help avoid accidents or crises. Strong leadership in this arena may help to avoid another common response to the lawsuit scare: "Let's not use volunteers; it's too risky."

The role of the leader of volunteers with regards to staff is: 1) to educate them regarding the rationale for risk management practices in working with volunteers; and 2) to give them tools to implement the necessary procedures. Every proactive volunteer leader must be responsible for staying current with best practices and changes in the law. Response should not be paralysis or hasty volunteer program cutbacks, but rather an introduction of prudent practices of solid risk management.

Learning Objectives

The **primary purposes** of this module are to:

- Share the importance of adhering to policies and procedures for managing risk in a volunteer program.
- Give tips for controlling/alleviating/diminishing risk through effective volunteer position design, screening, training, and supervision.



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Upon completion of this module, the participant will be able to:

1. Explain risk management and appreciate its importance regarding volunteers.
2. Discuss the agency's policies and procedures related to risk management.
3. Identify and evaluate potential risks in volunteer involvement.
4. Address and diminish risk with preventive strategies and techniques such as volunteer work design, screening, training, and supervision.
5. Explain how to handle a volunteer-related liability incident or emergency situation within the organization.

General Notes to Trainer

1. This workshop is in a suggested format. Feel free, however, to personalize it with your own stories. Also, phrase questions and activities in a manner most attuned to your organization.
2. Developing risk management procedures should primarily be the role of the board and administrative levels of the organization, but their effectiveness depends on how they are adhered to within the organization. Thus, the real purpose of this module is to develop an understanding of the "why" of risk management and share some practical ways it can be carried out. This should not increase stress and workload but ultimately deliver a stronger program with less time devoted to crisis management and problems.
3. This topic has the potential of paralyzing many people due to the fears it invokes. It is best to share the information, not from fear and distress but out of general concern that all who share in the work of the mission are operating in a safe environment and are performing tasks best suited to them.
4. Since good risk management is a reinforcement of standard volunteer management principles, it may be best to deliver this presentation after staff have been trained in areas such as volunteer position design, supervision, and evaluation. Otherwise, the presentation will be interrupted with questions regarding general "how-to" issues of day-to-day work with volunteers. Note: This module does not take the place of extensive training of staff and volunteers who are working with vulnerable populations, particularly those with the greatest potential for abuse to occur, such as frail elderly, people with disabilities, or youth.



Presentation Overview

SLIDES/ HANDOUTS	SECTION	METHOD OF PRESENTATION	TIME
S-1 to 4	Introduction <ul style="list-style-type: none"> • Introductory Activity • Purpose • Learning Objectives • Key Concepts 	Activity/Presentation	8 minutes
H-1			
S-5 to 11	Key Concept 1 Essential nature of Risk Management	Interactive Presentation	10 minutes
H-2			
S-12 to 15	Key Concept 2 Agency policies on Risk Management	Presentation	10 minutes
H-3			
S-16 to 24	Key Concept 3 Risk Management Strategies	Presentation/Activity	20 minutes
H-4, H-5			
S-25 to 26	Key Concept 4 Handling emergencies within our agency	Presentation with Agency handouts	5 minutes
H-6			
S-27	Summary/Wrap-up/ Evaluation	Recap Closing Statement	2 minutes
H-7			Total: 55 Minutes



Presentation Script

SLIDE/ HANDOUT	SECTION	TIME
S-1: Introductory Exercise	<p style="text-align: center;">Opening Exercise</p> <p>Have several participants share potential risks to volunteers, to clients, and to agencies when organizational work is performed by volunteers. (You may wish to record on an overhead transparency or flip chart.)</p>	8 minutes ▼
S-2: General Principles	<p>Debrief and lead into the workshop: After generating the list of potential risks in the volunteer program, present the following general principles:</p> <ol style="list-style-type: none"> 1. Every organization has a different set of risks but each one is teeming with potential risks. "Ignorance is bliss" won't work. Identifying our risks is the first step in empowering us to prevent them. 2. Nothing can protect us from someone bringing a lawsuit against us if they wish. The purpose of insurance is to provide financial coverage should we need to defend our actions in court. 3. Insurance may protect us financially, but it cannot undo the bad publicity of a lawsuit, the shaken faith of our supporters, the anguish of defending a claim, and other losses not covered by insurance. 4. We cannot totally eliminate the potential of "human error" - or accidents - in our programs; but an emphasis on managing our risks will considerably lower the chances of accidents or errors aimed at or caused by volunteers. 5. As we consider our risks, it is always important to weigh the extent of the risk, the importance of the activity, and the opportunities to build in better risk management procedures. 	
S-3: Learning Objectives: Risk Management	This exercise leads naturally into a discussion of the purpose of the training: to share the importance of developing and adhering to a risk management program, and to give some tips on ways to implement such a program.	
S-4: Key Concepts H-1: Key Concepts	<p>Share four Learning Objectives. Indicate that this workshop is built on 4 Key Concepts and share them.</p>	



Training Busy Staff to Succeed with Volunteers:
The 55-Minute Training Series

SLIDE/ HANDOUT	SECTION	TIME
S-5: Key Concept 1	<p align="center">Key Concept 1</p> <p>Preventive risk management is essential for all organizations serving the community.</p>	10 minutes ▼
S-6: Basic Questions	<p>Presentation: We must start out by answering several questions:</p> <ul style="list-style-type: none"> • What is risk management? • Why do we need to have a risk management system? • What's at risk? 	
S-7: What is Risk Management?	<p>What is risk management? Risk management is a system to forecast risks and take proactive steps to deal with identified risks.</p>	
S-8: Steps in Risk Management H-2: Why Interview?	<p>Steps in risk management:</p> <ol style="list-style-type: none"> 1. Identify risks (what might go wrong) 2. Evaluate each risk (how likely is it to occur and what is the amount of potential harm) 3. Control risks by choosing to: <ul style="list-style-type: none"> • stop or delay of activity until safe • eliminate/diminish risk - change the way volunteers are screened, trained, and supervised • minimize harm - develop procedures to handle a disaster or emergency • transfer liability - insurance policy, waiver, etc. 	
S-9: Why ?	<p>Why have a risk management system? The ultimate benefits are protecting our agency, its clients, its staff and volunteers, and running a better program to meet our organization's mission.</p>	
S-10: Liabilities in a Volunteer Program	<p>In the past few decades, nonprofit, religious, and educational organizations have increasingly become targets for lawsuits based on:</p> <ol style="list-style-type: none"> 1. Liabilities of the individual volunteer (based on criminal, civil and breach of obligation to the organization) 2. Liabilities of the agency to the volunteer (based on agency not protecting volunteer from harm of discrimination, injury on job, etc.) 3. Liabilities to the agency due to action by volunteers (based on volunteers' acting within or outside of the scope of their volunteer duties) <p>An insurance agent can present more information on the above, if time allows and if pertinent.</p>	



Training Busy Staff to Succeed with Volunteers: The 55-Minute Training Series

SLIDE/ HANDOUT	SECTION	TIME
S-11: What's at Risk? H-2: Managing Risks	<p>What's at risk? People, property, income, goodwill, etc. We must pay attention to this!!!</p> <p>Possible activity: If time allows and if applicable, have participants fill out the assessment in Handout 2 (Managing Risks: A Look at Volunteer Liability) prior to attending the seminar. Discuss what people discovered and begin to set priorities to counter any clearly identified gaps in risk management.</p>	<p>▲ (same 10 minutes)</p>
S-12: Key Concept 2	<p style="text-align: center;">Key Concept 2</p> <p>All paid and volunteer staff within an organization need to be familiar with and follow established agency policies and procedures as they relate to risk management.</p> <p>Presentation: (If you have not developed policies, you may wish to begin gathering some input on areas where policies and procedures are needed. If you have risk management policies and procedures, share the written documents with participants. Begin with a look at the specific benefits of having policies within your organization.)</p>	<p>10 minutes ▼</p>
S-13: What Will Risk Management Policies Do For Us? H-3: What Can Written Policies and Procedures Do for You?	<p>What do (will) policies do for us? (You may ask the question and record participant responses or you can present the information. Your choice is dependent on the sophistication of participants and your time frame for delivering the module.)</p> <ol style="list-style-type: none"> 1. Establish a standard for behavior, a common body of knowledge. 2. Support unpleasant but necessary requirements (e.g., volunteer mentors requiring criminal checks). 3. Provide valuable orientation and training. 4. Help ensure operational consistency. 5. If sued, they will strengthen your case. 	
S-14: Some Sample Topics H-3	<p>(You may wish to present your established policies at this time or use this listing as suggested areas that need clear policies and procedures. Every organization will differ on which policies are necessary and how information is best imparted to volunteers. Assistance in writing these is found in <i>Volunteer Management: Mobilizing all the Resources of the Community, Appendix Three: Sample Volunteer Management Policies</i>, listed under Resources at the end of this module.)</p>	



Training Busy Staff to Succeed with Volunteers:
The 55-Minute Training Series

SLIDE/ HANDOUT	SECTION	TIME
<p><i>(continued)</i> S-14: Some Sample Topics H-3</p>	<p><i>(continued)</i></p> <ul style="list-style-type: none"> • General Risk Management Philosophy Statement • Required Training (e.g., Hospice, counseling) • Emergency Procedures • Complaints and Due Process • Handling of Media and Organizational Logo • Confidentiality of Client Information • Suspension and Dismissal of Volunteers • Financial and Operations Controls • Who Can Volunteer (clients, employees) • Working Conditions and Reporting of Hazardous Materials • Screening Policies for Volunteers <p>(Refer to Handout 2 on Volunteer Policies and Procedures)</p>	<p style="text-align: center;">▲</p> <p>(same 10 minutes)</p>
<p>S-15: Policies should...</p>	<p>Policies and procedures are important if you want to control risks.</p> <p>Policies should be:</p> <ul style="list-style-type: none"> • Made • Followed • Reviewed and updated, as needed 	
<p>S-16: Key Concept 3</p>	<p style="text-align: center;">Key Concept 3</p> <p>All paid and volunteer staff must recognize potential risks unique to their situation and know preventive strategies to address and minimize those risks, including work design, screening, training, and supervision.</p>	<p>20 minutes</p> <p style="text-align: center;">▼</p>
<p>S-17: Two Things to Remember</p>	<p>Presentation: There are two things to keep in mind :</p> <ol style="list-style-type: none"> 1. All volunteer positions do not have the same level of risk and therefore will have differing risk management strategies associated with them. 2. Once the risk factors are identified in a volunteer position, preventive strategies should be incorporated into the position description, screening, orientation, training, and supervision of that position. 	



Training Busy Staff to Succeed with Volunteers:
The 55-Minute Training Series

SLIDE/ HANDOUT	SECTION	TIME
<p>S-18 to19: Level of Risk in Volunteer Position</p>	<p>Degrees of risk are illustrated in slides 18 and 19, and in Handout 4 which lists volunteer jobs ranging from the most vulnerable (unsupervised overnights between volunteers and vulnerable clients) to quite minimal risk jobs (such as light occasional clerical work done during office hours). You may wish to customize this slide to demonstrate the range of risk in your organization's actual list of volunteer positions.</p>	<p style="text-align: center;">▲ (same 20 minutes)</p>
<p>S-20: Reduce Risks by...Position Descriptions</p>	<p>Emphasize the key points of risk management in the following areas:</p> <p>Position Description: A written position description is the foundation for successful volunteer selection because it aims to eliminate the risks that result when you have an unqualified person in a job.</p> <p>Written descriptions reduce risks by:</p> <ul style="list-style-type: none"> • Establishing and communicating what a person is expected to do and not do. • Focusing on qualifications for the job, thus indicating that ability will be a significant selection criteria. • Serving as a tool to assess risks and choosing the proper level of screening. • Providing documentation, when necessary, to show that a volunteer acted outside of his/her assigned duties. • Establishing limitations and barriers (e.g., maximum time with client, location, and supervision requirement) that may discourage undesirable individuals from entering your program. 	
<p>S-21 to 22: Reduce Risks by...Screening H-4: Screening Volunteers</p>	<p>Screening Volunteers: (Note to facilitator: If your organization has some high risk volunteer positions such as unsupervised mentoring, special training should be given to staff regarding the types of screening questions to ask, need for special release forms, police checks, etc.)</p>	



Training Busy Staff to Succeed with Volunteers:
The 55-Minute Training Series

SLIDE/ HANDOUT	SECTION	TIME
<p><i>(continued)</i> S-21 to 22: Reduce Risks by...Screening H-4: Screening Volunteers</p>	<p><i>(continued)</i> For purposes of this introductory seminar, suggest some general tips on screening which might include the following:</p> <ul style="list-style-type: none"> • Using a structured procedure of screening replaces haphazard and potentially arbitrary decisions with a fair and defensible method. • Use the written position description and do personal interviews. • Multiple screening (interviewing by separate individuals) may increase chances of revealing suspicious responses. • Ask questions in different ways; verify some information, if warranted. • Gather all data before making final judgments. • Do not collect information you can't evaluate. • Make certain that information you gather is necessary and appropriate for the position. • Be consistent: all volunteers for the same position should be screened alike, using the same set of interview questions. 	<p style="text-align: center;">▲ (same 20 minutes)</p>
<p>S-23: Reduce Risks by ...Orientation...</p>	<p>Orientation, Training, Supervision, and Evaluation Clarify expectations and organizational values with volunteers.</p> <ul style="list-style-type: none"> • Provide written information regarding personnel, risk management, and other pertinent volunteer policies to enhance the competency of the volunteer doing the job. • Maintain oversight and support (supervision) to all volunteers so that they are empowered to do an effective job. • Give volunteers timely and specific feedback so that their behavior is reinforced or changed. • Proceed with volunteer dismissal, if warranted. • Do not assign new work to volunteers who have not been adequately screened or prepared. 	
<p>S-24: Risk Management Worksheet H-5: Risk Management Worksheet</p>	<p>Group Activity (optional - if time allows) Using an example of a volunteer position within your organization, discuss and list the responsibilities in the job, the qualifications of the volunteers you are seeking, and any risks inherent in the position. Note how you should factor in any risk management in the areas of Position Description, Screening Process, Orientation, Supervision, Training, and Evaluation. See Handout 3B activity: Assessment and Planning to Counter Risks in a Volunteer Position</p>	



Training Busy Staff to Succeed with Volunteers:
The 55-Minute Training Series

SLIDE/ HANDOUT	SECTION	TIME
S-25: Key Concept 4	<p align="center">Key Concept 4</p> <p>It is important to prepare for special challenges that might present themselves during the interview.</p> <hr/> <p>Presentation: Even the best procedures and programs are not guaranteed to be without accidents or crises. The important thing is to have clearly understood methods of handling these situations so as to protect and support all individuals involved. (Note to facilitator: If you have written policies regarding these areas, share, review and/or update them with staff and volunteers within your organization. If they are not fully developed, begin to create them with the assistance of the Resources section at the end of this module.)</p>	5 minutes ▼
S-26: Do You Know...?	<p>Recommended Areas to Cover:</p> <ul style="list-style-type: none"> • How to act in an emergency (e.g., stay calm, etc.) • How to deal with a person injured on the premises • Preserving physical evidence • Recording your recollection • Discussion of the incident with police, media, etc. • Who to notify in case of emergency, and the timeliness of this reporting • Procedures to follow in a natural disaster <p>(Handout 4 can be used to have participants discover what they know/need to know about handling emergencies.)</p>	
S-27: Summary H-7: Participant Evaluation Form	<p>Summary/Wrap-up/Evaluation</p> <p>Preventive risk management practices protect our clients, our volunteers and staff, and our organization. They also simultaneously enhance the quality of the work of our organization. We cannot afford to ignore these matters. The future of our organization may well depend on it.</p> <p>Distribute Participant Evaluation forms.</p> <p>End 55-Minute Training.</p>	2 minutes ▼



“Thumbnail” View of Slides

Training Busy Staff
to Succeed with Volunteers:
The 55-Minute Training Series

*Risk Management in
Volunteer Programs*

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Introductory Exercise

- ▶ Share potential risks to volunteers, to clients, and to agencies when organizational work is performed by volunteers.

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General Principles

- ▶ Every organization has its own risks.
- ▶ Nothing can protect from a lawsuit, but insurance provides financial coverage.
- ▶ Insurance cannot undo bad publicity, shaken faith, anguish, and other losses.
- ▶ Managing risks lowers the probability of “human error” by or toward volunteers.
- ▶ Weigh risk against its extent, the importance of the activity, and how to manage it.

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Learning Objectives

- ▶ Explain risk management and appreciate its importance regarding volunteers.
- ▶ Discuss the agency’s policies and procedures related to risk management.
- ▶ Identify and evaluate potential risks in volunteer involvement.
- ▶ Address and diminish risk with preventive strategies and techniques.
- ▶ Explain how to handle a volunteer-related liability incident or emergency situation.

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4 Key Concepts

1. Preventive risk management is essential for all organizations serving the community.
2. All paid and volunteer staff must be familiar with and follow agency policies and procedures for risk management.
3. All paid and volunteer staff must recognize risks unique to their situation and know preventive strategies to address and minimize those risks.
4. Organizations need written/shared procedures regarding liability and emergency situations.

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Key Concept 1

- ▶ Preventive risk management is essential for all organizations serving the community.

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Basic Questions

- ▶ What is risk management?
- ▶ Why do we need a risk management system?
- ▶ What’s at risk?

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What is risk management?

- ▶ Risk management is a system to forecast risks in advance and take proactive steps to deal with identified risks.

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Steps in Risk Management

1. Identify risks.
 - What might go wrong
2. Evaluate each risk.
 - How likely is it to occur?
 - What is the amount of potential harm?
3. Control the Risks:
 - Stop or delay
 - Eliminate or diminish
 - Minimize harm
 - Transfer liability

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Why do we need a risk management system?

- ▶ To protect our agency, its clients, its paid staff and volunteers.
- ▶ To run a better program to meet our organization’s mission.

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Liabilities in a Volunteer Program

- ▶ Liabilities of the individual volunteer.
- ▶ Liabilities of the agency to the volunteer.
- ▶ Liabilities to the agency due to action by volunteers.

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What’s at risk?

- ▶ People
- ▶ Property
- ▶ Income
- ▶ Goodwill

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“Thumbnail” View of Slides (continued)

Key Concept 2

- ▶ All paid and volunteer staff must be familiar with and follow agency policies and procedures for risk management.

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What Will Risk Management Policies Do For Us?

- ▶ Establish a standard for behavior.
- ▶ Support unpleasant, but necessary requirements.
- ▶ Provide orientation and training.
- ▶ Help ensure operational consistency.
- ▶ If sued, they will strengthen our case.

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Some Sample Topics

- General Risk Management Philosophy
- Required Training
- Emergency Procedures
- Complaints and Due Process
- Handling of Media
- Confidentiality of Client Information
- Suspension and Dismissal of Volunteers
- Financial and Operations Controls
- Who Can Volunteer?
- Working Conditions
- Screening Policies for Volunteers

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Policies should be...

- ▶ Made
- ▶ Followed
- ▶ Reviewed and updated

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Key Concept 3

- ▶ All paid and volunteer staff must recognize risks unique to their situation and know preventive strategies to address and minimize those risks, including:
 - Work design
 - Screening
 - Training
 - Supervision

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Two Things to Remember

1. All volunteer positions do not have the same level of risk and therefore will have differing risk management strategies associated with them.
2. Once the risk factors are identified in a volunteer position, preventive strategies should be incorporated into the position description, screening, orientation, training and supervision of that position.

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Level of Risk in Volunteer Positions

- ▶ Low-level Risk:
 - Light occasional clerical work done on-site during office hours.
 - Group-based sessions with competent adult leadership, in public places.
 - A collating "party" with competent volunteers and staff present.

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Level of Risk in Volunteer Positions

- ▶ High-Level Risk:
 - Unsupervised "mentoring" between an individual volunteer and a vulnerable client (elderly, disabled, youth).
 - Overnight visits by vulnerable individuals in volunteers' homes.
 - Health or personal care given to elderly in their homes by individual volunteers.

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Reduce Risks by...

- ▶ Written volunteer position descriptions.
 - Communicate expectations of volunteers.
 - Focus on qualifications as a significant selection criterion.
 - Help choose the proper level of screening.
 - Document that a volunteer acted outside of assigned duties.
 - Establish limitations and barriers that may discourage undesirable people from entering your program.

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Reduce Risks by...

- ▶ Screening volunteers.
 - A structured procedure replaces haphazard and arbitrary decisions with a fair method.
 - Use the written position description and do personal interviews.
 - Multiple screening may increase your chances of revealing suspicious responses.
 - Ask questions in different ways; verify some information, if warranted.

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Reduce Risks...Screening continued

- Gather all data before making final judgments.
- Do not collect information you can't evaluate.
- Make certain that information you gather is necessary and appropriate for the position.
- Be consistent: all volunteers for the same position should be screened alike using the same set of interview questions.

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Reduce Risks by...

- ▶ Orientation, Training, Supervision and Evaluation.
 - Clarify expectations and organizational values.
 - Provide written information on personnel, risk management and volunteer policies.
 - Maintain oversight and give support to all volunteers to empower them to be effective.
 - Give timely and specific feedback.
 - Proceed with volunteer dismissal, if warranted.
 - Do not assign new work to volunteers who have not been adequately screened or prepared.

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“Thumbnail” View of Slides (continued)

Risk Management Worksheet

- ▶ Volunteer Position:-----
- Responsibilities:
- Qualifications:
- Potential Risks Inherent in Position:
- Screening Process:
- Orientation Information:
- Training Needs:
- Supervision/Evaluation System:

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Key Concept 4

- ▶ Organizations need to have written/shared procedures regarding how to handle a potential liability incident or an emergency situation.

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Do You Know...

- ▶ How to act in an emergency?
- ▶ How to deal with a person injured on the premises?
- ▶ How to preserve physical evidence?
- ▶ How to record your recollections?
- ▶ How to discuss a liability incident with police, the media, etc.?
- ▶ Whom to notify in case of an emergency, and when?
- ▶ Procedures to follow in a natural disaster?

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Summary

- ▶ Preventive risk management practices protect our clients, our volunteers and paid staff, and our organization.
- ▶ They simultaneously enhance the quality of the work of our organization.
- ▶ We cannot afford to ignore these matters. The future of our organization may well depend on it.

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Suggestions for Expanded Activities for Sessions over 55 Minutes:

1. This workshop could be two or three hours in length, leaving more processing time for participants. If the session's purpose is primarily to impart or reinforce already established risk management guidelines, the 55-minute time allocation may be sufficient, if written handouts are given to participants. If this is a relatively new concept or subject for staff, more time will be needed for understanding the "why" (e.g., the benefits of preventive risk management).
2. You may wish to add a handout clarifying what insurance your agency carries on volunteers or volunteer activities so that staff can answer any questions from volunteers related to these matters.
3. It will be most helpful if participants think through strategies of volunteer work design, training, supervision, etc., for a volunteer position they supervise. New ideas may emerge. More time will need to be devoted to Key Concept 3 if you wish experiential participation.
4. This topic can be given in a two- or three-part series:
 - the "why" of risk management
 - an evaluation of your agency's risks
 - a plan to respond to the risk.

This may be particularly useful for a small organization in the process of developing systems.

5. Unfortunately, if this workshop takes place held after a wake-up call (e.g., a liability incident in the organization) it will naturally generate greater interest, particularly Key Concept 4 (What to do if you were a witness in a liability situation). It is important to capitalize on this opportunity but far better to stress prevention and get your organization on board *before* an incident. To obtain permission to give this workshop, it may be necessary to share what has happened to another organization that was not paying attention to this critical preventive step (e.g., a child molesting situation; a volunteer or staff unknowingly admitting guilt to an accident victim on the organization's property).
6. If it is important to share more in-depth liability information (e.g., the optional exercise under Key Concept 1), you may wish to have this section presented by a lawyer or insurance agent. You will need to allocate more time as many questions may surface. The downside of this is the paralysis that many people feel after hearing stern legal information. It is essential that you follow with a reassuring response that you have some ways to prevent the likelihood of this occurring.
7. If your organization is not dealing with these key issues, you may serve in a proactive role to deliver this information to the attention of the agency's administrator and/or the Board of Directors.
8. You may wish to suggest that this module be incorporated into a generalized agency risk management seminar which includes other agency-wide aspects of risk management, such as health and safety checks of the facility.



Suggested Resources on Risk Management in Volunteer Programs

Books

Graff, Linda L. *Better Safe....Risk Management in Volunteer Programs and Community Service*. Dundas, ON: Linda L. Graff & Associates, 2003. Order at <http://www.lindagraff.ca> or <http://www.energizeinc.com/bookstore.html> .

Graff, Linda L. *Beyond Police Checks: The Definitive Volunteer and Employee Screening Guidebook*. Dundas, ON: Linda L. Graff & Associates, 1999. Order at <http://www.lindagraff.ca> or <http://www.energizeinc.com/bookstore.html>.

McCurley, Steve and Rick Lynch. "Sample Volunteer Management Policies." Appendix 4 in *Volunteer Management: Mobilizing all the Resources of the Community*. Kemptonville, ON: Johnsntone Training and Consultation, Inc., 2006. Order at <http://www.energizeinc.com/bookstore.html> or <http://www.bettystallings.com> .

Articles

From *e-Volunteerism: The Electronic Journal of the Volunteer Community*. <http://www.e-volunteerism.com>

Graff, Linda L. "It's Never Over: Ongoing Screening of Volunteers and Paid Staff." *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. I, Issue 1, Fall-2000.

Henry, William R. "Volunteers' Most Common Accidents – and How to Avoid Them." *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. IV, Issue 1 October-December 2003.

McCurley, Steve. "Legal Liability and Risk Management Programs (Re-Visited)." *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol VI., Issue 3, April-June 2006.

Web Sites

Nonprofit Risk Management Center
<http://www.nonprofitrisk.org> .



Handout 1

The 4 Key Concepts of Risk Management in Volunteer Programs

1. Preventive risk management is essential for all organizations serving the community.
2. All paid and volunteer staff within an organization need to be familiar with and follow established agency policies and procedures as they relate to risk management.
3. All paid and volunteer staff must recognize potential risks unique to their situation and know preventive strategies to address and minimize those risks, including: in work design, screening, training, and supervision.
4. Organizations need to have written/shared procedures regarding how to handle a potential liability incident or an emergency situation.



Handout 2

Managing Risks: A Look at Volunteer Liability

How Well is Our Organization Managing Risk?

Please choose one of the three answers and mark it with a checkmark.

General Liability and Risk Management	Yes	No	Some- what
Does our organization have an ongoing risk management committee?			
Have we examined the activities performed by volunteers and taken action to manage the risks?			
Do we have a complete up-to-date policy and procedural manual for the operations of our organization?			
Do we formally review that manual every year?			
Do we have general liability coverage?			
Does that coverage clearly state that volunteers are covered?			
Is there one person responsible to review and update this coverage?			
Do we have events throughout the year that put us at greater risk for liability? If so, do we obtain coverage?			
Managing the Risks of Interviewing, Screening, and Terminating Volunteers	Yes	No	Some- what
Do we have up-to-date job descriptions for each volunteer position in our organization, including board members?			
Do our volunteer job descriptions clearly indicate what qualifications are needed to fulfill each position?			
Do our job descriptions clearly specify what physical requirements are required for the position?			
Do we protect ourselves against discrimination in the way we write our job descriptions?			
Do we regularly review work performance with volunteers?			
Do we tell them in their initial orientation they will have performance reviews? When? What will be covered?			
Do we document that review in writing?			
Do we immediately handle complaints or concerns about volunteers' behavior?			
Do we have written procedures for terminating volunteers?			
Do we explain policies and procedures of organizational operations to the volunteers in their initial orientation?			

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(continued)



Managing Risks: A Look at Volunteer Liability (continued)

Managing the Risks of Interviewing, Screening and Terminating Volunteers (continued)	Yes	No	Some-what
Do we provide volunteers with a written handbook regarding the policies and procedures?			
Do we clearly explain their supervision and to whom they are responsible?			
Do we ask volunteers to sign a statement that they have received orientation and training and understand our expectations of them?			
Do volunteers understand the boundaries of their job descriptions? What they can and cannot do? Where they should and should not be?			
Managing the Risk of Confidentiality	Yes	No	Some-what
Do our volunteers understand confidentiality and privacy?			
Do we make volunteers aware of the ramifications of breaking confidentiality and what that could mean to them and the organization?			
Managing the Risk of Personal Injury Liability	Yes	No	Some-what
Do we explain safety procedures in working with clients?			
Do we adequately post safety warnings?			
Do we explain safety in their physical workspace?			
Do we provide general safety training for volunteers on an ongoing basis?			
Do we have an incident report form and do we require volunteers to report any incident which is not consistent with the routine activities?			
Do we abide by the Right to Know Act and provide that information?			
Managing the Risks of Volunteer Drivers	Yes	No	Some-what
Do we have insurance that covers volunteer drivers?			
Do we have certificates of insurance on file for volunteers driving their own vehicles?			
Are volunteers aware that they must notify us of any changes in their insurance policy?			
Do we need or have automobile insurance above and beyond the volunteer's own coverage?			
Are volunteers aware that they may need to notify their personal auto insurance carrier of their volunteer driving activities?			
Do we check driving records?			
Do we have specific standards by which to measure driving records?			
Do we provide any special driving training for volunteer drivers?			
Do we have a regular inspection program of our vehicles?			

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Means of Managing Risk

Eliminate the Risk

There may be occasions when your organization makes the choice that because of the amount of risk or loss possible, you eliminate the program or activity.

Transfer the Risk

Transferring risk is usually done by purchasing insurance. Transferring risk is also accomplished by a non-insurance transfer. Through a contract containing a hold-harmless clause with another party, you may receive services through them with less risk to your own organization.

Reduce the Risk

Reducing risks requires awareness of the risk and defining policies and procedures that provide loss prevention for that activity. Your organization and/or risk management committee can identify areas of risk that are less obvious than others by examining all your activities, policies, and procedures. A planned risk management process can then be implemented to reduce as much of the liability as possible.

Retain the Risk

There may be areas of liability that you as an organization may simply decide to retain given your programs and operations. But, keep in mind, by making the choice to not transfer the risk, not reduce the risk, or not eliminate the risk, you are retaining the risk. In other words, by not assessing and making plans to manage a particular risk, you are retaining it. The key is to make a conscious choice about what you will retain and what you can reduce, transfer, or eliminate. Document what risk you are choosing to retain. Document the process and the rationale you went through as an organization to make that choice.

Along with any of the above choices you make...

Monitor and Evaluate

Periodically monitor and evaluate how your organization manages risk to assure the means you have chosen is still appropriate with your current environment.

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Handout 3

What Can Written Policies and Procedures Do for You?

- Establish a standard for behavior and a common body of knowledge
- Support unpleasant, but necessary requirements
- Provide a valuable orientation and training tool for volunteers, board members, and clients
- Help ensure operational consistency
- Strengthen your defense if you are sued
- Have a system for handling accidents

Potential Items for a Risk Management Policy

- General Statement/Philosophy of Risk Management
- Training (certification, in-service, etc.)
- Personnel Policies (volunteers and employees)
- Sexual Harassment and Anti-Discrimination
- Complaint Procedures and Due Process
- Media Relations (Who speaks for the agency?)
- Use of Organizational Name or Logo
- Emergency Procedures (paper back-up, etc.)
- Suspension (during investigation of offences)
- Operations (accident reporting, financial controls, record retention, etc.)
- Confidentiality Issues
- Volunteer Screening



Handout 4

Screening Volunteers

HOME VISIT BY SOCIAL WORKER

PSYCHOLOGICAL EVALUATION

CRIMINAL RECORD CHECKS

REFERENCE CHECKS

PERSONAL INTERVIEW

APPLICATION

Low Risk

Group-based sessions with competent adults in public places

High Risk

Overnight visits by vulnerable individuals at volunteers' homes

LEVEL OF RISK

Programs with greater misconduct risks need to screen volunteers more thoroughly.

As the sensitivity of the volunteer assignment increases, the need for multiple and more thorough screening procedures rises. If screening is conducted, ***ALL VOLUNTEERS SHOULD BE SCREENED.*** Criminal record checks may be an important element of the screening procedure because they can eliminate known offenders and scare away people who have been convicted of “target” crimes. Nonetheless, criminal records checks have several limitations as a screening tool.

CRIMINAL RECORDS CHECK LIMITATIONS

- No effective means of checking all out-of-state records
- Some systems are not automated, so records are hard to find
- Criminal records are not always complete and accurate
- Name searches will not find aliases
- Delays can last several months in some jurisdictions
- Department may not be permitted to release desired information
- Charges may have been dropped regardless of guilt
- Plea bargain may have resulted in conviction for an unrelated offense

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Nonprofit Risk Management Center (National Center for Community Risk Management and Insurance)



Handout 5

Assessment and Planning to Counter Risks in a Volunteer Position

Worksheet Activity

Assessment

1. Identify the volunteer position in your organization or faith community that has the highest risk potential:
2. List any risks associated with this position (those most probable to occur):

Planning

Identify what needs to be initiated or enhanced to counter these potential risks:

1. Written agency policies/recordkeeping procedures
2. Volunteer position descriptions
3. Interviewing/screening procedures
4. Orientation and training provided
5. Supervision and evaluation methods



Handout 6

DO YOU KNOW... ?

- How to act in an emergency?
- How to deal with a person injured on the premises?
- How to preserve physical evidence?
- How to record your recollections?
- How to discuss a liability incident with police, the media, etc.?
- Who to notify in case of an emergency?
- Procedures to follow in a natural disaster?



Participant Evaluation Form

Thank you for taking the time to share your evaluation of today's seminar. Your critique is valued and will be considered as we continually strive to improve our support to all personnel who team with volunteers.

1. Check the appropriate box to indicate whether you **met**, **partially met**, or **did not meet** the following learning objectives for this workshop:
 - a. Explain risk management and appreciate its importance with volunteers.
 met *partially met* *did not meet*
 - b. Discuss the agency's policies and procedures related to risk management.
 met *partially met* *did not meet*
 - c. Identify and evaluate potential risks in the volunteer program and describe preventive strategies and techniques of job design, screening, training and supervision to address and minimize these risks.
 met *partially met* *did not meet*
 - d. Explain how to handle a liability incident or emergency situation within their organization.
 met *partially met* *did not meet*

Comments:

2. This session was:

- | | | |
|--------------|------------------------------|-----------------------------|
| Helpful: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Provocative: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Practical: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Well-paced: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too short: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too long: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |

Comments:



Training Busy Staff to Succeed with Volunteers: *The 55-Minute Training Series – Evaluation Form*

Participant Evaluation Form (continued...)

3. This trainer was:

- Knowledgeable: YES NO
Prepared: YES NO
Organized: YES NO
Enthusiastic: YES NO
Good discussion facilitator: YES NO

Comments:

4. In what ways can you utilize this material in your work?

5. What, if anything, do you plan to do differently as a result of this training?

6. What additional information on this or any other topic dealing with volunteers would be helpful to you in your work?

7. What suggestions do you have to strengthen this workshop?

8. Further comments or suggestions:

NAME (optional) _____

H-7(b)

Training Busy Staff to Succeed with Volunteers: *The 55-Minute Training Series*

PowerPoint® Slides

*To open the attached PowerPoint slides,
double-click the thumbtack icon below.*



Trainer's Guide for Presenting...

Volunteer Recognition

Betty Stallings

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Volunteer Recognition

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Trainer's Guide for Presenting the *Volunteer Recognition* Module

Introduction to Volunteer Recognition

Often volunteer recognition is narrowly thought of as the formal banquet or a small gift to acknowledge a volunteer's donated service to an organization. Recognition needs to be considered an integral part of a total management philosophy that continually seeks to notice and value individual contributions.

Powerful and meaningful recognition begins when we recognize the talents and desires of prospective volunteers and offer them the job which responds to the motivational needs they are looking to fulfill through volunteering. The remainder of meaningful recognition is the myriad ways we formally and informally say "I noticed" and "thank you."

If you feel responsible for providing all of the volunteer recognition, and other staff and leadership volunteers see this as *your domain*, the most important guidelines of volunteer recognition are broken. Recognition needs to be timely and genuine, and it is most appreciated when given by the person's direct supervisor. In other words, volunteer recognition should primarily be the responsibility of the person overseeing the volunteer's work.

If your staff members have never examined their roles in creating and implementing ways to thank volunteers, this in-service topic will provide a stimulus for this important outreach.

Learning Objectives

The **primary purposes** of this module are to:

- Help staff appreciate the significance of meaningful recognition to volunteers.
- Discuss formal and informal acknowledgements that can take place at numerous times during a volunteer's involvement with the organization.



Training Busy Staff to Succeed with Volunteers: *The 55-Minute Training Series*

Upon completion of this module, the participant will be able to:

1. Get in touch with the power of recognition in their own lives.
2. Surface any personal and organizational barriers to giving volunteer recognition and then problem-solve solutions to address them.
3. Clarify the broad spectrum of ways volunteers can be thanked both formally and informally within the organization.
4. Brainstorm creative, minimal cost recognition items and acknowledgements that are culturally appropriate for your organization to use when saying "I noticed you!"
5. Describe the essential guidelines of effective recognition.

General Notes to Trainer

1. This workshop is in a suggested format. Feel free, however, to personalize it with your own stories. Also, phrase questions and activities in a manner most attuned to your organization.
2. This training should be upbeat and fun. Participants should leave the session with an increased sense of the value of recognition and additional ideas on ways to give it.
3. If your organization is resistant to volunteers or feels incompetent supervising them, other workshops dealing with these issues should precede this in-service training. Staff will not be receptive to talking about recognition if they need to work through real and perceived problems with the program.
4. If you are aware of general organizational barriers to giving staff or volunteer recognition within the organization, invite the participation of those who have the power to create an atmosphere of open support and appreciation (executive directors, other managers, etc.).
5. You may wish to change the timing in the workshop or use some of the suggested expandable activities, depending on what discussions are most appropriate to your organization.
6. To assist in the delivery of the workshop, you may wish to involve staff who are particularly effective at recognition or volunteers who can share the impact of recognition given to them.
7. Because there are four key concepts to cover, presentations and facilitation must be crisp and timed. If participants want more information, use this as an opportunity to ask for additional training time on the topic.
8. If you wish to supplement your presentation with many examples, review Sue Vineyard's book, *Recognizing Volunteers and Paid Staff: The Art, The Science and a Gazillion Ideas*. (See ordering information under Resources at the end of this training module.)



Presentation Overview

SLIDES/ HANDOUTS	SECTION	METHOD OF PRESENTATION	TIME
S-1 to 3	Introduction <ul style="list-style-type: none"> • Purpose of Workshop • Introductory Comments • Learning Objectives • Opening Exercise • 4 Key Concepts 	Presentation	8 minutes
H-1			
S-4 to 5	Key Concept 1 Recognition as an integral part of the management process	Presentation & Discussion	10 minutes
H-2			
S-6 to 10	Key Concept 2 Formal/Informal recognition	Presentation & Discussion	12 minutes
H-3			
S-11 to 13	Key Concept 3 Meaningful recognition	Presentation & Discussion	10 minutes
H-4			
S-14	Key Concept 4 Creative recognition	Activity	10 minutes
H-5			
S-15 to 16	Summary/Wrap-up/ Evaluation Key principles of recognition	Presentation Review	5 minutes
H-6			Total: 55 Minutes



Presentation Script

SLIDE/ HANDOUT	SECTION	TIME
	Introduction Summarize purpose and give some introductory comments on recognition.	8 minutes ▼
S-1: Learning Objectives	Show Learning Objectives.	
S-2: Recognition Experience	<p>Have participants think about the recognition they themselves received when volunteering.</p> <p>Ask: <i>What kind of volunteer recognition have you received? How meaningful was it to you?</i></p> <p>Debrief 1 Ask a few participants to briefly share their answers with the group. Try to get examples of meaningful and non-meaningful recognition.</p> <p>Debrief 2 Ask: <i>What did you learn about recognition in general as you listened to the participants tell about their own experiences?</i></p> <p>On flip chart or transparency, record what they learned. (Answers will most likely include the fact that recognition can be very powerful, meaningful, not meaningful, creative, spontaneous, poorly presented, expensive or inexpensive, inherent in the job itself, etc.)</p>	
	<p>Summarize the key learning of this exercise: <i>You learn many essential principles of recognition when you analyze your own experiences with receiving meaningful or not meaningful recognition in your life.</i></p>	
S-3: Key Concepts	This in-service training is built on 4 Key Concepts .	
H-1: Key Concepts of Recognition	Indicate that during the workshop, each concept will be examined together with relevant material.	



Training Busy Staff to Succeed with Volunteers:
The 55-Minute Training Series

SLIDE/ HANDOUT	SECTION	TIME						
S-4: Key Concept 1	<p align="center">Key Concept 1</p> <p>Recognition is an ongoing integral part of the management process, not only the banquet or certificate given annually.</p>	10 minutes ▼						
	<p>Presentation: Recognition is a philosophy and an attitude that needs to permeate an entire organization (department, etc.). If it isn't a part of our organization's culture, volunteer recognition on an ongoing basis will be hampered.</p>							
S-5: Organizational Barriers to Recognition H-2: Barriers	<p>Discussion Question: Are there any organizational barriers to giving positive feedback and recognition to our volunteers?</p> <p>Utilizing flip chart or transparencies, record barriers (left side) and methods to overcome barriers (right side).</p>							
	<table border="1"> <thead> <tr> <th data-bbox="518 898 880 926">Barriers</th> <th data-bbox="880 898 1269 926">Overcoming Barriers</th> </tr> </thead> <tbody> <tr> <td data-bbox="518 926 880 1045">1. Time</td> <td data-bbox="880 926 1269 1045">Many forms of recognition require little time (<i>give examples</i>).</td> </tr> <tr> <td data-bbox="518 1045 880 1220">2. Competition among volunteers for recognition</td> <td data-bbox="880 1045 1269 1220">Have volunteers vote for volunteer of the year.</td> </tr> <tr> <td data-bbox="518 1220 880 1373">3. Paid staff not feeling recognized</td> <td data-bbox="880 1220 1269 1373">Give joint recognition Paid and non-paid staff recognized as a team.</td> </tr> </tbody> </table>		Barriers	Overcoming Barriers	1. Time	Many forms of recognition require little time (<i>give examples</i>).	2. Competition among volunteers for recognition	Have volunteers vote for volunteer of the year.
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2. Competition among volunteers for recognition	Have volunteers vote for volunteer of the year.							
3. Paid staff not feeling recognized	Give joint recognition Paid and non-paid staff recognized as a team.							
S-6: Key Concept 2	<p align="center">Key Concept 2</p> <p>Recognition can be formal or informal and can be given on many occasions during the volunteer's involvement with the organization</p>	12 minutes ▼						
S-7: Formal Recognition	<p>Presentation: Formal recognition (annual awards ceremonies, recognition dinners, etc.) is frequently held during National Volunteer Week or at some designated traditional event (e.g., Valentine's Day, Thanksgiving, Annual Meeting, etc.). If appropriate, mention your organization's methods of formal recognition.</p>							



Training Busy Staff to Succeed with Volunteers:
The 55-Minute Training Series

SLIDE/ HANDOUT	SECTION	TIME
<p><i>(continued)</i> S-7: Formal Recognition</p>	<p>Major values of formal recognition:</p> <ol style="list-style-type: none"> (1) Builds community spirit among volunteers (2) Publicly recognizes volunteers - attracts others to join 	<p style="text-align: center;">▲ (same 12 minutes)</p>
<p>S-8: Formal Recognition</p>	<p>Cautions in formal recognition:</p> <ol style="list-style-type: none"> (1) Thinking they replace daily "thank yous" (2) Lack of personal presentations (3) More costly - some volunteers object (4) Inflexible programs - only have meaning to old-timers (5) Others (ask for additional ideas) 	
<p>S-9: Informal Recognition</p>	<p>Informal Recognition is the day-to-day ways we say, "We couldn't do it without you!" (Ask for a few examples from participants.)</p>	
<p>S-10: Discussion Question H-3: Times</p>	<p>Times for Recognition What ways do we currently recognize volunteers and how could we enhance our recognition during these and other times?</p> <ul style="list-style-type: none"> • When the volunteer signs up or first day • Daily or weekly basis • Monthly/yearly basis • Special occasions (birthday, anniversary date with organization, holidays, etc.) • During a long-term project • Upon completion of a short-term project • When they leave the organization • When they don't expect it 	



Training Busy Staff to Succeed with Volunteers:
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SLIDE/ HANDOUT	SECTION	TIME
S-11: Key Concept 3	<p align="center">Key Concept 3</p> <p>Recognition should be meaningful to the person being thanked and should be given in a timely manner.</p>	10 minutes ▼
<p>S-12: Meaningful to Each Person</p> <p>H-4: Motivations</p>	<p>Interactive Presentation:</p> <p>1. "Different strokes for different folks" holds true for volunteer recognition.</p> <p>Ask participants:</p> <ul style="list-style-type: none"> • <i>What kind of recognition do people who are motivated by accomplishment like?</i> • <i>What kind of recognition do people motivated by social interaction enjoy?</i> • <i>What kind of recognition do people motivated by power like?</i> <p>2. The trap we frequently fall into is recognizing people the way we like to be recognized (and that is irrelevant!). For example, "I like to receive certificates so I always give my volunteers certificates."</p> <p>3. When you are recognizing many types of volunteers in one event, make certain that you plan different types of activities and experiences so that all being honored feel personally appreciated.</p> <p>4. Recognition should be given as soon after the activity as possible. (Give an example from your organization or use this example: If someone chaired an event in the Fall, don't wait until Volunteer Week in April to do some personal recognition.)</p>	
S-13: Discussion Question	<p>Discussion Question:</p> <p><i>How are we currently personalizing our volunteer recognition and what could we do to enhance our efforts?</i></p>	



Training Busy Staff to Succeed with Volunteers:
The 55-Minute Training Series

SLIDE/ HANDOUT	SECTION	TIME
S-14: Key Concept 4	<p align="center">Key Concept 4</p> <p>Recognition can be creative and fun to give and receive, and is best when associated with an organization's culture and type of service (e.g., Annual Top Dog Award given at the Humane Society).</p>	10 minutes ▼
H-5: Creative Ways to Recognize Volunteers	<p>Activity: Use Handout 5 (Creative Ways to Recognize Volunteers) and ask small groups to use it as a stimulus to think of creative, inexpensive, and appropriate ways to say thank you to volunteers in your organization.</p>	
	<p>Feedback: Have small groups share their two most creative suggestions with the entire group. (You may want to demonstrate this creative type of recognition with a gift to the group with the most creative idea! Use your originality.)</p>	
<p>S-15 to 16: To review...</p> <p>H-6: Some Principles...</p> <p>H-7: Evaluation Form</p>	<p align="center">Summary/Wrap-up/Evaluation</p> <p>In closing, go through a reminder of some of the principles for successful volunteer recognition.</p> <p>Distribute Participant Evaluation forms.</p> <p>End 55-Minute Training.</p>	5 minutes ▼



Training Busy Staff to Succeed with Volunteers: The 55-Minute Training Series

“Thumbnail” View of Slides

Training Busy Staff
to Succeed with Volunteers:
The 55-Minute Training Series

Volunteer Recognition

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Learning Objectives

- ▶ Discuss the power of recognition in your own lives.
- ▶ Identify personal and organizational barriers to giving recognition; propose solutions.
- ▶ Explore ways of giving formal and informal recognition in our organizations.
- ▶ Review essential guidelines for giving effective recognition.

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Activity Personal Experiences

- ▶ Think about volunteer recognition in your own life:
 - What kind have you received?
 - How meaningful was it?
- ▶ What did you learn about recognition as you listened to the other participants tell about their experiences with it?

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4 Key Concepts

1. Recognition is an ongoing, integral part of the management process.
2. Recognition can be formal or informal and can be given often.
3. Recognition should be meaningful to the recipient.
4. Recognition can be creative and fun to give and receive.

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Key Concept 1

- ▶ Recognition is an ongoing integral part of the management process, not only the banquet or certificate given annually.

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Organizational Barriers to Recognition

- ▶ Time
- ▶ Competition among volunteers for recognition
- ▶ Paid staff not feeling recognized

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Key Concept 2

- ▶ Recognition can be formal or informal and can be given on many occasions during the volunteer’s involvement with the organization.

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Formal Recognition

- ▶ Annual awards ceremonies and banquets
- ▶ National Volunteer Week
- ▶ **Major values:**
 - Builds community spirit among volunteers
 - Publicly recognizes volunteers and attracts others to join

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Caution!

- ▶ **If you’re not careful, formal recognition can:**
 - Make staff think the annual event replaces daily “thank you’s”
 - Be impersonal
 - Be costly (some volunteers might object)
 - Be inflexible – and therefore might only have meaning to old-timers
 - *Can you think of other possible pitfalls?*

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Informal Recognition

- ▶ How we say thank you in day-to-day ways.
- ▶ *Can you identify methods of showing appreciation?*

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Discussion Question:

- ▶ *What ways do we currently recognize volunteers and how could we enhance our recognition during these and other times?*

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Key Concept 3

- ▶ Recognition should be meaningful to the person being thanked and should be given in a timely manner.

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“Thumbnail” View of Slides (continued)

Meaningful to Each Person

- ▶ “Different strokes for different folks.”
- ▶ Not everyone likes what we like.
- ▶ When recognizing many volunteers at once, you can still plan different activities for different tastes.
- ▶ Give recognition as soon as possible after the task is accomplished.

S-12

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Discussion Question

- ▶ *How are we currently personalizing our volunteer recognition and what could we be doing to enhance our efforts?*

S-13

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Key Concept 4

- ▶ Recognition can be creative and fun to give and receive and is best when associated with an organization’s culture and type of service.

Activity:

“Creative Ways to Recognize Volunteers”

S-14

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To Review...

- ▶ The best volunteer recognition is the most suitable placement.
- ▶ Recognition must be meaningful to recipients, not to the person giving the recognition.
- ▶ Formal awards should feel sincere and based on the impact of the work accomplished.
- ▶ Volunteer recognition should be timely.

S-15

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To Review...

- ▶ Use clear criteria so that awards feel fair and deserved.
- ▶ Many acts of recognition can be spontaneous, personal, and not costly.
- ▶ Short-term volunteers are best recognized at the work unit level with the group with which they interact.
- ▶ Long-term volunteers generally like recognition within the larger group setting.

S-16

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Suggestions for Expanded Activities for Sessions over 55 Minutes:

1. Take longer to hear participants' experiences with volunteer recognition and discuss what can be learned from these experiences.
2. Design a handout that asks participants to describe current recognition practices and new ideas generated at the workshop.
3. Give workshop participants a list of barriers to giving recognition and ask them to check off any that specifically apply to your organization. Spend more time working through a plan to overcome these barriers (e.g., volunteers don't work on site, most volunteers are short term, etc.).
4. Give significantly longer time for the groups to generate new ideas for recognition when utilizing the *Creative Volunteer Recognition* handout.
5. Ask group to come up with ways to incorporate many types of recognition styles in a formal ceremony so that all who are honored truly feel personally acknowledged.
6. Suggest a follow-up discussion to determine if new and rejuvenated methods of recognition are being tried as a result of this seminar.
7. Invite agency volunteers to the seminar; ask them to describe how the organization has recognized them and if the recognition has been meaningful or not meaningful.

Suggested Resources on Recognition

McCurley, Steve and Rick Lynch. *Keeping Volunteers: A Guide to Retention*. Olympia, WA: Fat Cat Publications, 2005. Order at <http://energizeinc.com/bookstore.html> .

Vineyard, Sue. *Recognizing Volunteers and Paid Staff: The Art, The Science and a Gazillion Ideas*. Darien, IL: Heritage Arts, 2001. Order at <http://energizeinc.com/bookstore.html> .

Wittich, Bill. *77 Ways to Recognize Volunteers*. Knowledge Transfer Publishing, 2003. Order at <http://energizeinc.com/bookstore.html> .



Handout 1

The 4 Key Concepts of Volunteer Recognition

1. RECOGNITION is an ongoing, integral part of the management process, not simply the year-end banquet or certificate given annually.
2. RECOGNITION can be formal or informal and can be given many times during the volunteer's involvement in the organization.
3. RECOGNITION should be meaningful to the recipient and should be given in a timely manner.
4. RECOGNITION can be creative and fun to give and receive, and should be attuned to the organization's culture and type of service.



Handout 2

Organizational Barriers to Volunteer Recognition

- Which of the following barriers exist in your organization?
 - What can be done to diminish these barriers?
1. Money: “We don’t have any budget to recognize volunteers.”
 2. Volunteers say: “We don’t need any.”
 3. Staff are not recognized themselves, so resist giving it to volunteers.
 4. Traditional, formal ways of recognition are institutionalized.
 5. Recognition for short-term volunteers is challenging.
 6. Volunteer program manager is responsible for all recognition.
 7. Don’t know how volunteers want to be recognized.

What other barriers to volunteer recognition have you noticed?

- 8.
- 9.
- 10.



Handout 3

Volunteer Recognition: Times and Methods

When and How Do You Formally or Informally Thank Volunteers?

When	How
▪ At Sign-up	
▪ First Day	
▪ Daily	
▪ Monthly	
▪ Annually	
▪ End of Project	
▪ Special Days: _____ _____	
▪ If Sick	
▪ At Departure	
▪ Just Because	
▪ Other Times: _____ _____	



Handout 4

Matching Volunteer Recognition to Motivations

Recognition for People Motivated by ACCOMPLISHMENTS

Awards and Acknowledgements

1. Plaques, badges, pins (e.g., tangible awards)
2. Letters of special commendation on their achievement(s) to boss, newspaper, school, etc.
3. Awards named in their honor
4. Nominations for local, state, national awards
5. Resumé documentation

Benefits on the Job

1. Entire responsibility delegated to them and latitude given to them on the way it is done
2. Opportunities to set goals, create innovative ideas
3. Work to succeed or pass a specific goal (e.g., raise \$20,000 in a fundraiser)

Recognition for People Motivated by SOCIAL INTERACTION

Awards and Acknowledgements

1. Names and photos appearing in newsletter
2. Recognition in presence of family, peers
3. Personal notes and verbal greetings from supervisor
4. Cards for special anniversary, birthday, etc.
5. Gifts and notes from clients
6. Banquets, potlucks, picnics
7. Attending a social event with other people

Benefits on the Job

1. Opportunities for socializing and meeting new friends
2. Personalized on-the-job training

Recognition for People Motivated by INFLUENCE/POWER

Awards and Acknowledgements

1. Public recognition (e.g., in front of peers, in media, etc.)
2. Awards named for them
3. Letters of commendation noting their influential achievements, impact, etc.
4. Notes from high administrators, community leaders, etc. commenting on their effect on mankind

Benefits on the Job

1. Assignments providing opportunities for influence, teaching, and interaction with high officials
2. Assignments with impressive titles
3. Work with a good deal of authority involved
4. A position on the Board of Directors



Handout 5

Creative Ways to Recognize Volunteers

Let volunteers know that they have your appreciation and support by giving them small, inexpensive gifts with personalized notes. Use the following examples or come up with your own individualized ideas.

Original art and design by Jane Vincent

<p>What a great idea! Bright idea! Note stuck to a Christmas bulb</p>		<p>No one holds a candle to you! Scented votive candle or pack of birthday candles</p>	
<p>A Cracker Jack idea... Box of CrackerJacks</p>		<p>You are a LIFESAVER! Candy with a note</p>	
<p>Your ideas are so exciting I could just pop... A balloon</p>		<p>You're the apple of my eye! Real or artificial apple - maybe tied with a bow</p>	
<p>Thanks for raisin' the tough questions! Mini-boxes of raisins</p>		<p>What an angel! Here's your halo... Two silver pipe cleaners twisted together</p>	
<p>Your great work has me wreathed in smiles! Small grapevine wreath</p>		<p>Your vision is our guiding light! Mini-flashlight</p>	
<p>I'm lucky to have you to help... A rabbit's foot</p>		<p>You have given our project the sweet smell of success! Potpourri or sachet packet</p>	



Handout 6

Key Principles for Successful Recognition of Volunteers

- The best volunteer recognition is placement into the assignment most suitable to each volunteer's motivations and talents.
- Recognition must be meaningful to the recipients, not to the person giving the recognition.
- Formal awards should feel sincere, not pro forma. They should not only recognize number of hours but should be based on the impact of the work.
- Volunteer recognition should be timely.
- Use clear criteria for awards so that people feel that rewards are fair and deserved.
- Many acts of recognition can be spontaneous and personal and often are not costly.
- Today's short-term volunteers are best recognized at the work unit level with the group with which they interact.
- Long-term volunteers generally like recognition within the larger group setting.



Participant Evaluation Form

Thank you for taking the time to share your evaluation of today's seminar. Your critique is valued and will be considered as we continually strive to improve our support to all personnel who team with volunteers.

1. Check the appropriate box to indicate whether you **met**, **partially met**, or **did not meet** the following learning objectives for this workshop:
 - a. Discovered the power of recognition in your own life.
 met *partially met* *did not meet*
 - b. Identified any personal and organizational barriers to giving volunteer recognition and proposed solutions to address the barriers.
 met *partially met* *did not meet*
 - c. Clarified the broad spectrum of ways volunteers can be thanked both formally and informally within the organization.
 met *partially met* *did not meet*
 - d. Brainstormed creative, minimal-cost recognition items and acknowledgements that are culturally appropriate for your organization to use when saying, "I noticed you!"
 met *partially met* *did not meet*
 - e. Reviewed essential guidelines of effective recognition.
 met *partially met* *did not meet*

Comments:

2. This session was:

- | | | |
|--------------|------------------------------|-----------------------------|
| Helpful: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Provocative: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Practical: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Well-paced: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too short: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |
| Too long: | <input type="checkbox"/> YES | <input type="checkbox"/> NO |

Comments:



Training Busy Staff to Succeed with Volunteers:
The 55-Minute Training Series – Evaluation Form

Participant Evaluation Form (continued)

3. This trainer was:

- Knowledgeable: YES NO
Prepared: YES NO
Organized: YES NO
Enthusiastic: YES NO
Good discussion facilitator: YES NO

Comments:

4. In what ways can you utilize this material in your work?

5. What, if anything, do you plan to do differently as a result of this training?

6. What additional information on this or any other topic dealing with volunteers would be helpful to you in your work?

7. What suggestions do you have to strengthen this workshop?

8. Further comments or suggestions:

NAME (optional) _____

H-7(b)