EVALUATING VOLUNTEERS, PROGRAMS AND EVENTS

By Sue Vineyard

To many people the word "evaluation" means "judgement" and conjures up pictures of final exams, parental assessments, boss's pronouncements or promotion considerations.

"Evaluation" brings shudders to others as they recall times when they were judged harshly, unfairly or inappropriately. Though most managers know it as a part of management, few relish this critical phase of the process.

What is it that causes such negative vibes? Why do so many people dread having to give or receive evaluations? Why is this part of the management process so often omitted in working with volunteers?

The answer is simple: Evaluation has been done inappropriately in the past and therefore has had very negative consequences.

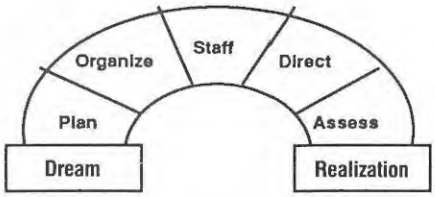
In the case of assessing volunteers, inappropriate evaluation has led to their departure. In the case of paid workers, it has resulted in disillusionment and defiance. And with programs and events, it has caused discouragement and disassociation.

All of these results, even when they happen infrequently in an organization or agency, are too high a price to pay!

It is up to those of us who are charged with the responsibility of managing programs and people to understand evaluation and use it as a positive tool for growth and success.

Evaluation and the Management Process

To understand evaluation, we must first understand where it fits into the management process. For many years I have used the symbol of a bridge, which spans the dreams we have and the realization of those dreams, to characterize the entire management process:



Evaluation falls in the fifth function, "Assess," and is the final link between our dreams and their realization.

The stage for evaluation is set during the first and second management functions where what is to be accomplished is determined and mapped out.

The Planning Function and Evaluation

During the planning function, goals and objectives are set very specifically. This tells us what is to be accomplished by individuals, programs or events and is *specific* (how much? when? etc.), *measurable* (for evaluation purposes), *achievable* (realistic) and *compatible* with the overall goal of the agency or organization.

This goal setting is fundamental to good evaluation, which must focus on events and specific accomplishments, never personalities. It tells us the expectations we have at the outset for results and therefore establishes a gauge by which actions and results can be measured.

If we set an objective that states a volunteer will make three public presentations regarding our agency over a two-month period and this is accomplished, the evaluation will reflect the success of this accomplishment. If the three presentations are not made, focus can be placed on the objective agreed on rather than any personal failure of the volunteer. "Let's talk about why only one presentation was made rather than the three agreed on" is a better approach than "Why didn't you make three presentations?" which is a negative "You" message.

The Organizing Function and Evaluation

Under the second function of management—organizing—plans of action and job designs are created that spell out expectations and action steps even more clearly.

Remember, the goal of evaluation is to help people feel successful by specifically acknowledging their progress. The best way to accomplish this is to insure that the person carrying out the responsibility for

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the action understands clearly what is to be done. The plans of action and the job create this understanding.

The plans of action should tell who is to do what, when, how and at what cost (time, energy, resources, etc.) The job design, which is the most critical tool leading to the evaluation, should be very specific telling:

- **Title:** Use simple truth in packaging here! If the person is to coordinate mailings, the title needs to be Mailing Coordinator, not Director of Communications Management, Handling and Interaction, Discipline"! (Gag)
- **Responsible to:** Be specific as to whom this person reports. You may even want to supply information on your chain of command so the person knows he or she reports to Mary Smith who reports to the Board of Directors, etc.
- **Responsible for:** Specifically list duties here, i.e., "Set up and deliver three speeches to membership organizations in town by June 30th with the goal of recruiting five volunteers from each to work on our September 5th health fair at Edwards Hospital."
- **Skills Required:** Again, be specific, i.e., public speaking, motivation, knowledge of agency/causes/needs, organization, etc.
- **Time Required:** In this section, try to share two perspectives of time commitments: (1) how long they will have this job (I urge one-year limits) and (2) how much time during that year it will take (three hours per week; ten hours per month; 50 hours during the year at their choice? etc.)
- **Parameters:** In this section of the job description, you describe any additional information that would clarify the volunteer's job and responsibilities. This often "fleshes out" expectations, rules, regulations, past history, assistance and training provided, etc. It always tells the person how he or she will be held accountable, i.e., "An informal discussion to explore results will be held by the entire committee one week after the event" or, "We'll schedule an evaluation of results of the work with you using the attached form during the 12th and last week of your work," etc.

The job description is the key tool to effective evaluation, because it spells out expectations and responsibilities and therefore defines what areas of accountability will be addressed in the future.

The Dual Evaluation System

During the first discussion of the job and the review of the job description, any evaluation form to be used for an individual or group needs to be given to the person accepting the responsibility.

This then allows the person(s) involved to know from the outset how they are to be held accountable.

Before the pre-set evaluation time is held, by mutual agreement (surprise evaluations are unfair), both the supervisor and the job holder fill out the form from their perspective, comparing their judgements. Obviously, the supervisor's copy, sometimes adjusted because of the input of the job holder, is placed on file for future reference.

Clarity—A Key to Good Evaluation

All of this process is dependent on the clarity of the job design as it sketches out for the volunteer, committee, job holder, etc., what is to be done, when, how, where and with what results expected.

The goal of evaluation is to help people feel successful by specifically acknowledging their progress.

It is also critical, as the person accepts a responsibility, that he or she clearly understands the overall goal or mission of the organization.

If a person works for Meals on Wheels for instance, he or she must understand that the ultimate goal is as much personal interactions, nurturing and bonding as it is nutrition!

To truly provide positive, accepted and effective evaluation, we must first set the foundation of well thought-out direction, expectations and objectives.

We must then insure that the person accepting the responsibility understands it thoroughly. Nothing should be left to assumption. Everything should be spelled out in writing and everyone interacting with the responsibility should have a clear understanding of its objectives and placement in any larger picture.

Much of this understanding is dependent upon clear communication, which is another key to good evaluation and must be checked frequently through direct feedback for its continued effectiveness.

Remember that it is not unusual for a person who understood his or her duties as described clearly in May to forget subtle or even blatant points by September. This is especially true of volunteers who accept an assignment in the spring for duties that aren't into full swing before the fall.

Do not assume everything you have explained about an assignment has been understood and kept clearly in mind over a period of time! Check clarity and direction continuously and put all expectations in writing!

A golden rule for any communication is: Never use quarter words when nickel words will do!

Remember that evaluation, to be fair, can only focus on understood responsibilities. A person should not be held accountable for that which they did not know they were to do.

When the Evaluation Is Omitted

In working with volunteers, the assessment or evaluation part of the management process is the most likely to be omitted.

Please understand that by doing so, the volunteer administrator, chairperson or supervisor is sending a double message: On the one hand, they are saying (usually during recruitment and assignment): "We really need you to do this important work; it is essential," and on the other hand (by omitting accountability), they're saying: "It really wasn't important, we're not even taking note of your effort."

A second, subtle message we send by not evaluating volunteer efforts is: "Volunteers do not need to be held accountable." Since the general population is aware that paid staff are always held accountable, we're saying that volunteers are of a different, lower status. This simply is not true.

Volunteers need to be seen as a part of any group's staff with their only variance being the way they are rewarded, through personal satisfaction rather than monetarily. To lower standards for volunteers simply because they do not work for a paycheck is to do them a great disservice.

Evaluation is a critical part of managing people, programs or events and when done well and effectively can lead to pride, satisfaction and future growth and success.

Do it!

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