

RETIRING THE VOLUNTEER: Facing Reality When Service is No Longer Possible

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Most directors of volunteer programs are comfortable with the recruitment and orientation of potential volunteers. It is exciting to create meaningful opportunities for service and emotionally rewarding when the volunteers' experience is mutually beneficial. The picture becomes more clouded, however, when the volunteer is no longer able to provide the required services. Although a variety of problems could suggest the need for termination, the responsibility for this decision is not an easy one to shoulder. The difficulty of this issue, for both volunteers and volunteer managers was underscored in a retirement/termination survey conducted nationwide among Foster Grandparent Programs.

SURVEY RESULTS

Twenty-three Foster Grandparent Programs representing rural and urban communities throughout the United States responded to a questionnaire which assessed volunteer termination issues. Using a 10 point scale, project directors were asked to score the difficulty of volunteer retirement or termination. The questionnaire also assessed whether the volunteers wanted to retire from service, whether a retirement or termination plan existed, and whether the volunteer director admitted to a delay in coping with the issue. The results of the survey validated the degree of difficulty involved in the decision to terminate a volunteer. A score of 8 or above denoted retirement/termination as a "difficult or very difficult issue"; 82% of the respondents indicated that the retirement or termination of volunteers registered in that category. None of the respondents found termination to be a "very easy" task and 73% of the vol-

unteer directors indicated that the volunteers did not want to withdraw from service. Over 60% of the volunteer directors indicated a delay in dealing with the issue and the vast majority, 73% of the respondents, did not have a comprehensive retirement or termination plan to help assist in this endeavor. Since Foster Grandparent Programs recruit volunteers who are over 60 years of age, it is probably not surprising that health concerns forced the need for retirement or termination. 86% of the respondents indicated that health issues were usually the cause of sub-standard performance.

ORGANIZATIONAL VARIABLES

It is important to note that, because the Foster Grandparent Program operates under specific federal legislation, there are many regulations which define the services provided by volunteers. Careful attention is given to program infrastructure. These volunteer programs are required to develop personnel policies, recruitment protocols and training components. Volunteers are required to have job descriptions; memorandums of understanding are developed for every agency receiving volunteer services. As a result, Foster Grandparent Programs can often demonstrate a well evolved form of volunteer management. If these programs, which have the experience of developing specific volunteer personnel policies, still encounter difficulties in the termination of volunteers, it is safe to assume that other volunteer efforts face similar difficulties.

UNDERSTANDING THE PROBLEM

There are a variety of reasons why the termination of volunteers remains a difficult management issue. Termination is

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challenging for the non-volunteer segment of society and so much needed information from other sectors has been largely unavailable. When dealing with older volunteers, a more positive term such as "retirement" is sometimes used by volunteer managers. This term is seen as less aversive and helps the volunteer director avoid some of the specificity in describing why the action is necessary. However, although retirement has been considered the major normative event for the second half of life, it is an area excluded from most personnel policies (Ekerdt, 1989). Furthermore, the Age Discrimination in Employment Act has clarified the "voluntary" nature of retirement and has helped to create employee sensitivity to that issue. Even though volunteers realize that they are not employed, they are more aware of retirement versus termination issues. That awareness is underscored by the fact that claims of age discrimination filed with the EEOC, on a percentage basis, have been increasing in the last few years at a rate faster than those for sex and race discrimination (Eglit, 1989).

If, because of health concerns, an older volunteer is unable to provide the required services, is the volunteer retired or terminated?

When termination is clearly the desired outcome, it may be very difficult for the volunteer manager to prove that a volunteer is unable to adequately serve. The functional criteria to evaluate an employee's ability to perform given work is often lacking. This oversight is even more common in volunteer management. Even when clear personnel policies are in evidence, volunteers sometimes exist outside the formal framework of the organization's structure. As a result, there may be great variability in the standards of performance required of volunteers. Some agencies have developed volunteer handbooks, training protocols and specific job descriptions. There exists evaluative criteria to help examine the services provided by volunteers. Other organizations have a more flexible posture and have few qualifiers for service and little means of analyzing standards of performance. There is sometimes the notion that volunteers have to be appreciated and not over-regulated.

It is not unusual to hear a volunteer comment: "Well they can't really fire me, you know. I'm just a volunteer!" If an agency does not have a carefully developed orientation and training program for volunteers, the likelihood of a consistent, well formulated termination plan is reduced.

THE NEED FOR INTERVENTION

The lack of termination protocols can create serious difficulties for everyone concerned. A project manager might find it increasingly difficult to address performance issues with volunteers who are experiencing difficulties. It is hard to justify a "murky orientation/cut-throat termination" procedure. When the rules are not clear at the outset, enforcement may be nearly impossible. Volunteer managers need to develop clear and comprehensive personnel protocols which define tasks and stipulate issues such as leave of absence, speculative replacement jobs and readmittance to the volunteer program. Those expectations are a component in the overall orientation training provided to the volunteer. Volunteers have a right to expect that fair practices are implemented and that decisions are made on the basis of objective and substantiated information.

This situation underscores the importance of a personnel continuum. Volunteer handbooks which clarify all program protocols are an essential requirement. Each volunteer's personnel file should minimally include a signed application form, a job description, an annual appraisal and a statement indicating acceptance of the personnel regulations. It is also important to develop a specific protocol to follow when the retirement of a volunteer is imminent. If this accumulation of data is to be meaningful, it is important to include specific feedback from all those who come into contact with the volunteer.

Although it is not feasible to evaluate a volunteer's performance or make a decision regarding termination without input from the staff receiving the volunteer support, volunteer program managers often cite difficulties in receiving honest feedback. Personnel appraisal can be particularly discomfiting because of the technical difficulties, the guilt associated with

power and the responsibility of subjective evaluation procedures (Nalbandian, 1981). When those concerns are added to the functional difficulties of adequately determining job standards and the inadequacies common in orientation protocols, it is easy to understand why volunteer managers postpone resolving termination issues. It is also easy to understand why those receiving volunteer assistance are unwilling to be the "bad guys" and provide the information which forces the termination of a volunteer.

An Assessment Index (which is provided) is particularly helpful when an intervention is needed. The form is based on the required criteria for serving as a volunteer Foster Grandparent or Senior Companion. In those programs some of the essential criteria include: a four hour per day service schedule, the ability to follow a care plan and the willingness to accept supervision. Other volunteer programs can adapt the form to the specific requirements which shape volunteer activities. For a hospital volunteer, criteria might include the ability to follow protocols established for handwashing or for infectious disease control. It is important to be clear about the non-negotiable elements of volunteer service and to be able to explain those elements to the volunteers and to the staff receiving the volunteer assistance. When an assessment index is shared with the staff supervising the volunteers, it is possible to obtain the necessary specificity to understand and document the need for intervention. It is also possible to help clarify whether the volunteer might still be able to serve, but in a different capacity.

This form is an addition to, but not a replacement of the annual performance

appraisal. It is not unusual for problems to develop some months after an annual appraisal is performed. In such cases, it is not advantageous to delay resolving the issue until the next scheduled performance appraisal.

SUMMARY

It is a disservice to all parties concerned when problems in volunteer service are ignored. Volunteerism has become increasingly important and respected in today's society. Volunteer managers frequently underscore the professional quality of the services available through volunteerism. That emphasis on professionalism demands a respect for personnel protocols. Volunteer programs cannot float in a nether world where accountability does not apply. The values, ethics and integrity of the program director and the volunteer are at stake. The termination of volunteers is a part of the ethical responsibility which volunteer managers must shoulder. It is a process which begins with the initial orientation of the volunteer and continues throughout the volunteer process.

REFERENCES

- Eglit, Howard. 1989. "Agism in the Workplace: An Elusive Quarry." *Generations*, Spring (Vol. 13): p. 31-35.
- Ekerdt, David. 1989. "Retirement Comes of Age." *Generations*, Spring (Vol.13): p. 4-6.
- Nalbandian, John. 1981. "Performance Appraisal: If Only People were Not Involved." *Classics of Public Personnel Policy*. California: Brooks/Cole Publishing Co.

ASSESSMENT INDEX

Abilities Required of Volunteers	Yes	No
1. Does the volunteer serve the required hours?	_____	_____
2. Does the service follow program regulations?	_____	_____
3. Does the volunteer follow a job description?	_____	_____
4. Does the volunteer relate to assigned clientele?	_____	_____
5. Have volunteer work habits changed significantly in the past six months? Changes noted: _____ _____	_____	_____
6. Has the rate of absenteeism increased in the past six months? List approximate # of days missed: _____	_____	_____
7. Are there safety issues which could be of concern, i.e., falling down, confusion, etc.	_____	_____
8. Do the staff report difficulty in supervising the volunteer?	_____	_____
9. Has there been increased conflict with volunteer station staff or others? List problems: _____ _____	_____	_____
10. Is it realistic to discuss a different placement?	_____	_____
11. Is the volunteer aware of the problems?	_____	_____
12. Have volunteer complaints increased?	_____	_____
Summary of findings: _____ _____ _____		