ABSTRACT

In response to the challenge to accurately and appropriately assess the value of volunteer efforts, this article offers a naturalistic approach which focuses on the impact of service delivery in the lives of clients. The article describes the establishment of outcome measures, data gathering processes, and the presentation of assessment information.

Valuing Volunteers: A Naturalistic Approach

Kathleen M. Curtis and James C. Fisher, Ph.D.

INTRODUCTION

As potential funding sources approach the difficult task of allocating resources to the voluntary sector, they are increasingly interested in evidence of effective program outcomes. In order to survive, agencies need well-developed methods to gather and present information which describes both service effectiveness and efficiency with precision. The current emphasis on accountability poses a special challenge when attempts are made to assess services delivered by volunteers.

Two familiar methods have been used to assess the efforts of volunteers: 1) collection of statistical data on the amount of volunteer effort, and 2) analysis of replacement costs of equivalent positions. Each of these methods has limitations in its ability to present information which accurately reflects the impact of volunteer programs on the lives of clients. This article reviews these limitations and proposes a naturalistic approach which allows decision makers and funding sources to assess the value of volunteer services on the basis of a more appropriate presentation of program outcomes.

The Traditional Approaches

One traditional approach used to describe the results of volunteer programs has been to assess the work of volunteers through a form of effort evaluation. This familiar approach involves compilation of statistical information on the number of volunteers involved, the hours of volunteer service provided during a given period of time, and the number of clients served. No indication of quality of services or actual outcomes experienced by clients are reflected in this form of assessment. The number of volunteer hours and clients served provide only a partial view of the program unless accompanied by information which describes the extent to which program goals were met and clients were impacted by the activity of volunteers. This form of assessment fosters the misguided notion that since volunteers do not charge for their services, their efforts need not be evaluated for effectiveness. From it one is expected to infer that because volunteers are doing something, they must be doing some good.

A more recent method presented as a means of assessing the value of volunteer efforts is the assignment of a replacement cost for "equivalent services," as if they were to be purchased from paid employees rather than provided by volunteers (Karn, 1983). In order to determine replacement costs, the program manager identifies a paid employment classification which is judged to be equivalent to the types of services provided by volunteers. The hourly rate of pay for that employment classification is multiplied by the number of volunteer hours to arrive at "true value." The costs of paid staff benefits and indirect service time may also be considered as part of this formula.

Although the replacement cost approach to valuing volunteer services offers interesting mathematical computations, it promotes acceptance of the traditional school of thought which implies that an assessment of volunteer efforts can and

Kathleen M. *Curtis* is the Director of Volunteer Services Division at Family Service of Milwaukee. She has been awarded the CVA credential (Certified in Volunteer Administration) by the Association for Volunteer Administration. She has served as a manager of volunteer programs and board member for a variety of community-based organizations for eight years. *James* C. *Fisher, Ph.D.,* is an Associate Professor of Adult and Continuing Education at the University of Wisconsin-Milwaukee where he teaches the course "Leadership and Management of Volunteer Services." He has served as a staff person in a volunteer agency for 25 years and is currently a board member for several community-based organizations, educational programs, and colleges.

should be translated into dollars without regard for those intangibles which are a valued component of volunteer services.

Why Volunteers?

The use of effort evaluation or replacement analysis may be appropriate if an agency's rationale for involving volunteers in service delivery were based entirely on budgetary considerations. In that instance, given available funds, paid staff would more likely be employed than volunteer staff, since volunteers are primarily valued because they provide relatively inexpensive labor. Widespread efforts to assess volunteer service solely from the standpoint of monetary input prompt the fundamental question, "why volunteers?"

If an agency chooses to involve volunteers primarily because it values the unique nature of the contributions volunteers bring to service delivery, then comparisons of paid staff time and volunteer time based on monetary considerations do not provide a valid comparison since the true value of volunteer efforts is reflected in terms of outcomes rather than inputs. Valuing volunteer services based on outcomes experienced in the lives of clients allows the agency to be consistent with its rationale for involving volunteers in service delivery. These outcomes can be measured and described through an alternative, naturalistic approach which describes the impact of volunteers' services on agency goals using both qualitative and quantitative measures. When compared with use of input measures, this approach is more appropriate and useful. Additionally, it celebrates the unique difference between the contributions of paid staff and volunteers.

The naturalistic approach is also more compatible with the feelings volunteers express regarding the value of their efforts. Volunteers, as well as managers of volunteer programs, have typically felt uncomfortable attributing dollar value to volunteer services based on cost comparisons between volunteer efforts and those of paid staff. Volunteers frequently display negative, often vehement reactions against such suggestions, preferring recognition of the uniqueness of their services with descriptions such as "irreplaceable" and "invaluable." Basic to their feelings is a sense that the value of volunteer time falls somewhere outside of the economic norm and therefore should not be measured against a monetary standard. One reason for the reluctance to accept a monetary standard as a measure of value for volunteer efforts may lie in the fact that it reduces considerations of value to those readily translated into monetary measures. The naturalistic approach is likely to be positively received by both volunteers and managers of volunteer programs since it allows the question of value to include the unique and diverse nature of volunteer efforts.

Equivalency or "Bread and Roses"?

In a social service setting, there are often some apparent similarities between paid staff and volunteer staff: both engage in forming a relationship with the client for an agreed-upon purpose, both use the structure of the agency or program as a way of setting boundaries on their time and effort, and both are committed to giving of themselves to the client. However, it is the *nature* of the relationship that is the difference.

A comparison of paid staff and volunteer time is basically inappropriate because of their incommensurability. They are sufficiently different in principle so that a common basis of comparison with respect to both their time and the results of their efforts is inappropriate. The metaphor "bread and roses" provides a descriptive illustration of the concept of incommensurability as it relates to the intrinsically different roles of paid staff and volunteers. In a social service setting, the way in which paid professionals (the "bread") give of themselves to promote client healing and growth is based on a theoretical framework and practice model analogous to the recipe and procedure used in making bread. The way in which volunteers ("the roses") develop a relationship with a client is through a nurturing, "blossoming" transaction, a spontaneous *being with* the other person that is rich in humanity and carried out with personal distinctive style. Not only is it closer to a friend/friend relationship, it can represent, or take the place of, some family involvement. Both paid staff and volunteers have

a particular job to do, but the outcomes of the efforts of each vary because of these basic differences in direction.

The naturalistic approach to assessing the value of volunteer efforts recognizes these differences and allows decision makers and funding sources to fully appreciate the unique outcomes of volunteer efforts.

Valuing Intangibles

Whereas the traditional approaches assess the value of tangible considerations which can be readily translated into monetary terms, an advantage of the naturalistic approach is that it can provide a means to communicate information regarding the intangible outcomes which occur when clients are favorably impacted by services provided by volunteers. The descriptive, qualitative information which is gathered and presented through the naturalistic approach can help decision makers and funding sources gain increased insights to the client-related outcomes which can be linked specifically to the efforts of volunteers. These include such things as clients' increased self-esteem, improved judgment, growing ability to nurture others, etc. Although decision makers and funding sources may currently request effort evaluation or replacement cost analysis, managers of volunteer programs can, through the naturalistic approach, offer more useful information which will allow others to fully appreciate and understand the value of the volunteer efforts.

AN ALTERNATIVE:
THE NATURALISTIC APPROACH

The primary advantage of the naturalistic approach is that it provides a better "feel" for the role of volunteers and how their efforts contribute to program success. "Naturalistic" is a particularly apt description for this approach, as it allows the inherent, spontaneous, subjective characteristics of volunteer involvement to be considered in an assessment of the value or worth of volunteer programs. The naturalistic approach includes the following elements:

- indication of outcomes evidenced in the lives of program participants and/or the community,

- identification of causal linkages between volunteer activities and outcomes,
- and presentation of qualitative information in quantitative terms.

The naturalistic approach involves three essential steps which may be modified to reflect the unique characteristics of individual programs and their impact.

Step 1: Establishment of Outcome Standards and Measures of Success in Relation to Program Goals

The naturalistic approach can and should begin with a descriptive statement regarding the number of clients, hours of service, and cost of the program. This information is provided to give decision makers and funding sources a perspective regarding the scope of the program.

The outcome standards describe program goals in terms of desired impact in order that program success can be measured against a predetermined standard. The focus is on results experienced by a specific client population and/or community rather than simply on the amount of effort to be expended through program implementation. The number of outcome standards set for each program may be one or as many as five, depending on the scope of the program.

An example of the type of descriptive information which precedes the outcome standard statements:

The "Family Life Education" program will be successful if at least 300 participants are provided with 1,200 hours of service at a total cost of $10,000, resulting in at least. . .

Examples of a variety of program goals and measures of success written in the form of outcome standard statements:

- *90% of program participants will report increased ability to deal effectively with their anger and/or stress.*
- *80% of program participants will increase educational achievement levels by 20% or more.*
- *75% of parents who participate in the program will report increased involvement and satisfaction with their children's education.*

- *90% of teen mothers who participate in the prevention program will not have a repeat pregnancy during their remaining teen years.*

As a variation to step 1, an organization which involves volunteers in a broad community-wide effort rather than one limited to a specific group of participants may develop outcome standards which reflect results felt by the community as a whole:

For example:

The Teen Pregnancy Prevention campaign, sponsored by a group of local television stations will be successful if the city experiences at least. . .

Examples of broad-based program outcome standard statements:

- *a 20% decrease in the community's teen pregnancy rate.*
- *a 20% increase in the community's high school completion rate.*
- *a 10% increase in minority employment.*

Another variation to step 1 is to define a range of percentage levels which indicate varying degrees of success, *i.e.*, the program will be highly successful if 80%–90% of program participants report increased ability . . . , moderately successful if 60%–80% report increased ability, etc.

Step 2: Development of Processes to Collect Data to Demonstrate the Degree to Which Outcome Standards Established in Step 1 Are Achieved

In this step, both qualitative and quantitative data may be collected, but the emphasis is primarily on qualitative data and evidence of the intangible benefits experienced by participants. Data is compiled and interpreted to reflect progress toward the outcome standards established in step 1. Where possible, collection instruments and processes are designed to specifically link volunteer efforts to outcomes in order to substantiate the role of volunteers in program success. Managers of volunteer programs have an opportunity to use their creativity as they develop various means of data collection and present the data for use by decision makers and funding sources. Two ideas for data collection techniques are a) Goal Attainment Scaling and b) Client Survey.

A. Goal Attainment Scaling

This type of data collection provides evidence of causal linkages between volunteer activities and the achievements of program goals and outcome standards as in the following illustration of a form of goal attainment scaling used in the Family Aide program at Family Service of Milwaukee.

In this program, a volunteer is matched with a socially isolated, troubled teen mother who is at risk of child abuse and neglect, alcohol and/or drug abuse, and other serious problems. The volunteer and client form a friendly relationship in which the volunteer serves as a mentor and role model regarding parenting and social skills and helps the teen work toward personal growth. This program has some similarities to other social service programs which match a volunteer friend to a client with needs: Big Brothers/Big Sisters, Advocates for Retarded Citizens, Compeer (friends for the mentally ill), and volunteer programs working with at-risk youth in schools or the criminal justice system. Although other social service programs could benefit from this technique by adapting it according to their unique services, goal attainment scaling works particularly well in programs where volunteers have a one-to-one relationship with clients.

The goal attainment scaling technique used in Family Aide is an adaptation of a method developed to evaluate comprehensive community mental health programs (Kiresuk & Sherman, 1968). Goals are established once the volunteer and client have successfully established a relationship, usually after three to five meetings. The volunteer determines the specific goals on which she will work with her client, often in consultation with the program manager and/or social worker. In other types of programs in which the client is at an emotional and intellectual level which allows for participation in goal-setting, the client may also be involved in goal selection.

In setting these goals, the volunteer Family Aide links the activities of the program in a tangible way to the outcome standards determined by step 1. This link-

age describes the role of the volunteer as the major variable in the level of outcomes achieved by the program. Goal selection also provides volunteers with a foundation from which to structure their activities and discussions with the client. Charting client progress toward goals also provides volunteers with feedback on their effectiveness.

One of the Family Aide outcome standards is that at least 90% of the teen mothers who participate in the program demonstrate improved parenting skills. In goal attainment scaling, the volunteer selects goals which can reflect progress toward this outcome standard and tailors those goals to the individual needs of her client. For example, for a client who has had a record of child abuse and/or neglect, the volunteer may select one or more of the following goals: The client demonstrates. . . .

1) an increase in behaviors which demonstrate nurturing and protective parenting,
2) an increase in behavior which demonstrates an ability to handle anger and stress effectively and nonviolently,
3) an increase in behaviors which demonstrate an understanding of infant developmental stages and acceptance of the behaviors which can be expected of the child at each stage.

Family Service of Milwaukee uses a case management system which includes forms which are used to document client progress toward goals over time. After goal selection, the volunteer in consultation with the program manager or social worker, describes potential outcomes in five different categories which focus on the various levels of success possible, ranging from least to most favorable outcomes thought likely for the particular client (see Appendix A). The outcome scales, or levels of predicted goal attainment, are specific to individual teen mothers. The volunteer then charts client progress toward these goals at regular intervals over the space of a year, using the form contained in Appendix B.

The goal selector (the volunteer) may choose to specify priority by establishing a set of weights for the goals, reflecting her appraisal of the value each goal has in indicating a successful outcome in the life of the client. This is not a necessary component of goal attainment scaling since equal weighting of goals does not lose information or decrease indications of program outcomes. Its primary function is to provide the volunteer with a means to sort out the relative importance of the various goals selected for the client.

B. Client Survey

Another way to gather qualitative data on outcomes which reflect significant changes in clients' lives and behaviors is to gather their responses to a Client Survey (see Appendix C). The survey may be administered in written form or may be done orally with clients who are illiterate or for whom English is not the primary language. If done orally, it may be best to involve a neutral third party rather than the volunteer to administer the survey so that client responses will be as open as possible.

The program manager summarizes and interprets client statements to reflect progress toward program outcome standards. For example, a Family Aide client described her relationship with the Family Aide in the following way:

We are very close now. She has filled my life with many possibilities in religion, connections in business and knew the right persons to talk to whenever I had a question or a need.

In describing the helpfulness of the Family Aide volunteer, a client said:

My friend provided me with social outlets. I got to see her family and hear her tips on parenting (she has seven children). She helped me when I needed her, supported my efforts to finish college, applauded my accomplishments and final attainment of a career. I attended her family gatherings and she attended mine. She is my daughter's godmother and was my sponsor to join the Catholic Church. She is the exact model of a perfect friend and she is my "best friend."

These responses were summarized and interpreted by the program manager in the following way:

The client is seeing new possibilities for her life, she is more aware of resources and social outlets. She has grown from tips on family and parenting, and her self-esteem is increased from the support and applause of her volunteer friend. She has attained school and career goals and has been proven competent and worthy. She has grown spiritually. She has had a model of a "perfect friend."

Social workers, volunteers and/or program managers can add their own observations to the client surveys, indicating areas in which they have observed client growth during the relationship with the volunteer. In the above case, one social worker added: "The client has become a successful single parent, and although also challenged by a physical disability, she graduated from college and attained a job which allows the family to be off general assistance for the first time." Parent reports can also be used in a similar way if working with adolescents or youth.

In addition to collecting qualitative data through techniques such as goal attainment scaling and client surveys, step 2 may also include the gathering of quantitative data where possible. The latter can take the form of such things as test scores, pre- and posttest comparisons, school reports, statistical information, and longitudinal records.

Step 3: Preparation and Presentation of Information for Reports to Decision Makers and Funding Sources

The data collected through the goal attainment scaling and client surveys are necessarily more descriptive in nature than the data collected through traditional input measures alone and are therefore less adaptable to brief, succinct statements. However, the qualitative information can be presented in a quantitative way by linking it to the outcome standards and at the same time offering the reader a fuller appreciation of the impact of the program.

Information gained through the goal attainment scaling process can be compiled and converted to statements which reflect progress toward desired outcomes such as the following: "In 80% of the volunteer/client relationships, teens achieved more than expected levels of progress toward goals; 60% of these were in the areas of protective parenting, and 70% in the areas of decreased social isolation."

Client survey results can also be quantitatively related to program outcome standards. For example, outcome standards established for the Family Aide program refer to increased self-esteem, parenting skills, and social interactions/communication skills in at least 80% of the clients. The program manager reviews responses to the client surveys and interprets those responses to determine which clients have grown in the above-mentioned areas, and to what degree. A summary statement on each area can be developed, including such statements as "80% of clients report increased parenting skills as evidenced by such things as increased responsiveness to their child's emotional needs," or "75% of clients gained in communication skills as evidenced by their ability to handle anger or solve problems."

Selected quotes from client surveys and observations made by volunteers, social workers and program managers through the goal attainment scaling process can add flavor to the assessment of the value of the program and provide evidence of the intangible, difficult to measure, or unforeseen benefits which occurred through the delivery of services. A specific case study of how a volunteer worked with a client to achieve progress toward specific goals can provide the reader with a fuller understanding of the therapeutic nature of the volunteer/client relationships developed through the program. Examination of client feedback and of goal attainment data, presented anonymously, provide the means for a valid assessment of the value of volunteer services in the achievement of agency goals.

SUMMARY

Traditional methods of assessing the value of volunteer efforts have relied principally on quantitative data to allow for convenient translation to monetary values. Use of the monetary standard as a basis upon which to determine the worth of volunteer efforts may at first glance appear appropriate, yet upon closer inspection it becomes apparent that these traditional

methods fail to consider service effectiveness. The naturalistic approach provides this ingredient by focusing on output measures rather than merely on the traditional input information.

The naturalistic approach to assessing the value of volunteer services is designed to focus on output measures as evidence of program benefits rather than merely on the traditionally-used input measures. Managers of volunteer programs who choose to use the naturalistic approach may wish to address the need by funding sources and decision makers for assistance in understanding the advantages of outcome standards and the concept of reporting qualitative data in quantitative terms. Such obstacles notwithstanding, the use of outcome measures, especially those documented with naturalistic data, may be more in keeping with the intrinsic value of volunteer services as described by both volunteers and clients.

REFERENCES

Karn, N. Money Talks: A Guide to Establishing The True Value of Volunteer Time. *The Journal of Volunteer Administration*, Winter 1982–83.

Kiresuk, T.J., and Sherman, R.E. Goal Attainment Scaling: A General Method of Evaluating Comprehensive Community Mental Health Programs. *Community Mental Health Journal*, 1968, Volume *4 (6)*.

APPENDIX A

FAMILY SERVICE OF MILWAUKEE
FAMILY AIDE PROGRAM

GOAL-ATTAINMENT SERVICE PLAN

Client Name _____   Volunteer _____

Client-Specific Goals
(use separate form for each goal)

GOAL:

Least Favorable
Outcome Thought
Likely

Less Than
Expected
Success

Expected Level
of Success

More Than
Expected
Success

Most Favorable
Outcome Thought
Likely

Beginning Date: _____   Review Date: _____   Closing Date: _____

APPENDIX B

FAMILY SERVICE OF MILWAUKEE   FAMILY AIDE PROGRAM

PROGRESS CHART/DATA BASE

Client: _____   Volunteer: _____

Goal Statement:

Starting Point:

Review Date	Activity/Observations	Level of Progress

APPENDIX C

FAMILY SERVICE OF MILWAUKEE   FAMILY AIDE PROGRAM

CLIENT SURVEY

DATE: _____   NAME OF CLIENT: _____
                              (VOLUNTARY)

1. How long did you have a volunteer friend from Family Service?

2. How frequently did the two of you meet? _____ Weekly _____ Every other week
   _____ Other (specify)

3. What kinds of activities did you do?

4. How was your child (or children) involved with her?

5. Please provide a brief description of your volunteer friend.
   Indicate what she was like, what kind of person.

6. How did you feel about the time you spent together, and the activities you shared?
   Indicate if you wish you had done different things.

7. Some of the aims of the Family Aide Program are:
   (1) to help single parents have social activities,
   (2) to provide a role model for healthy parenting,
   (3) to encourage single mothers to continue their own growth and development.

   Please describe the way in which your Family Aide volunteer friend was most helpful
   to you. Expand on this a little: What has it meant to you, personally, and as a
   mother, to be a part of this program? (Use reverse side of paper as needed.)

THANK YOU FOR TAKING TIME TO COMPLETE THIS FORM