



# EVALUATING VOLUNTEERS FOR POSITIVE RESULTS

By Linda Thornburg

**A** volunteer is *not* an unpaid worker who donates free time to worthwhile programs. Today, the not-for-profit community recognizes that all volunteers need to be paid. While the currency won't be dollars, it should include what's most important to the volunteer—work experience, recognition, social acceptance, or being able to affect change.

Once we accept that volunteers do indeed need a paycheck, it's easier to see why it's important to evaluate their efforts and the contributions they make to a program. There are many good reasons to periodically evaluate volunteers. But Steve McCurley, who has worked in the volunteer arena for most of his professional life, says one thing evaluations shouldn't be about is dealing with all the small performance problems supervisors have been ignoring since the last evaluation.

Evaluations are an occasion to give volunteers valuable feedback that will help them do their jobs better, and to gain feedback that will strengthen the program. Supervisors should be addressing small performance problems on a daily basis. There is nothing more damaging to morale than being told you've been doing something wrong for an entire year.

Evaluating volunteers is sometimes

perceived as more difficult and cumbersome than it needs to be. Evaluations shouldn't be approached as if they are a negative process in which the supervisor has to confront problems she would rather not tackle. And they shouldn't be thought of as one of those times when you will come out looking stupid, because you don't have the same expertise as your volunteer in certain areas.

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Nor should volunteer managers worry about whether volunteer evaluations will lead to budget cuts or the need to justify the program better. All of these are reasons that volunteers sometimes don't get evaluated. But evaluations, approached with the right attitude and conducted for the right reasons, will only enhance your

program and give your volunteers, supervisors, and program coordinators crucial information that can be used to implement constructive change.

Steve McCurley thinks of evaluations as an opportunity to congratulate a volunteer for a great job. It's also one of the few times when a volunteer's supervisor or coordinator can recheck the volunteer's motivation level. Does this person need greater challenges now? Should the job be redesigned to accommodate those needs, or should the person be moved to a different position?

Did the person really get the proper training to do the job well? Evaluations can give you valuable clues as to whether you need to revamp the training program or put in some refresher courses.

Most important, the evaluation is a time when the volunteer can give the supervisor feedback. One of the big aversions to evaluations, McCurley says, is that it usually means the supervisor will come away from the meeting with changes that will need to be made to better empower the volunteer.

"Most volunteers want to do the best job they can," he says. "The absence of feedback is both demeaning and disturbing to them. And most of them will win in assessment sessions."

Reenie Marshall, program development manager for the Virginia Office of Volunteerism, says good evaluations are dependent first of all on having good job descriptions and recruiting and screening

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*Linda Thornburg, a regular contributor to VAL, wrote the cover feature of the summer issue, "What Makes An Effective Volunteer Administrator?"*



practices. The better you know the volunteer's needs and preferences and how these mesh with the job, the easier it will be to give them the feedback they need to perform competently. If you've brought the right person to the job and the responsibilities have been clearly spelled out, evaluation will be a matter of measuring the work accomplished against goals set earlier and giving people direction about how to improve.

Marshall believes the essence of evaluating is helping grownups figure out for themselves what they can do better. "Evaluations should never be punitive," she says. "The supervisor has to start with the premise that evaluations are to enable volunteers to do the most satisfying job for themselves and the program."

Goals on which evaluations are based should be set jointly by the volunteer and the supervisor at the recruiting phase. "Don't just say, you've been here a year and here is how you are doing," Marshall says. "Let volunteers know from the beginning that there are benchmarks and expectations for this position. Make them a participant in setting these."

"Tie all analysis back to the mission of the program and the volunteer's position. Let the volunteer know what they contributed to the mission and why that is important. If nothing else happens, this should be the cornerstone of the evaluation—that the volunteer sees how their efforts fit into the bigger picture; that they will have a clear sense of how the work they do helps to further the mission of the program."

Deborah Russell, volunteer services coordinator for the City of Hampton, Virginia Department of Social Services, says she has found that the more like a paid job the volunteer position is, the more effective the volunteer and the program are. Russell uses the same procedures and the same forms to evaluate volunteers as paid staff are evaluated on.

*Steve McCurley offers the following outline for thinking about an evaluation:*

- Review the past
- Analyze the present
- Plan the future
- Listen at least as much as you talk
- Remember that the evaluation may show as much what you need to do as what the volunteer needs to do

Her supervisors evaluate volunteers monthly, especially for those new to positions. These monthly sessions are opportunities to explore whether the supervisor and the volunteer think the goals for the position are being met, whether time commitments are being kept, whether tasks are completed as expected, and generally how the work is going.

"Nobody volunteers to do a bad job," Russell says. "Volunteers get frustrated when they don't know if they are making a difference. Ongoing and regularly scheduled conferences give volunteers valuable feedback and the opportunity to talk about ways to improve their individual performance."

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Another reason to evaluate is to give the volunteer something in black and white that testifies to their effectiveness. "Most volunteers really like this," Russell says. "They not only want to see how they can go from 'good' to 'very good,' but how they can have the greatest impact in their program area."

Many of the volunteers in Russell's programs are there to gain work experience that will lead eventually to paid jobs. Russell says she needed documented evidence of volunteer effectiveness she could use in letters of recommendation. "It's helpful to the volunteer to be able to say that their supervisor found them effective or showing leadership traits. Often the supervisor isn't available when I need this information, so a monthly evaluation gives me a document I can use to respond to these requests. It also lets me see better how the placement is progressing."

## **HOW'RE THEY DOING? The Evaluation Form**

Evaluation of a volunteer is normally guided by the use of an evaluation form. The form will have space for basic data such as the name of the volunteer, the title of the volunteer's position, the period covered by the evaluation, and the date of the evaluation.

Beyond this basic data, the form should have space to record:

1. How well the goals for which the position was created were met
2. Whether the volunteer kept his or her time commitments and whether tasks were completed on time
3. Whether the volunteer showed initiative
4. Whether the volunteer showed flexibility
5. How well the volunteer related to staff
6. How well the volunteer related to other volunteers
7. How well the volunteer related to clients

The form should also include space for comments on the areas listed above by both the supervisor and the volunteer.

And, if desired, information can be recorded on the form about how the volunteer feels about the position and about remaining in it.

Finally, space can be provided to record anything which can be done to support the volunteer in this position or to move the volunteer to another position.

—from *"A Volunteer Supervision Handbook"* of the Hampton Department of Social Services, Hampton, Va.; David McMullen, author and volunteer

One final reason to do evaluations: They may be used later in defending a volunteer's work against allegations of liability. They offer protection for volunteers by demonstrating that there is a shared responsibility between the volunteer and the program and its paid staff. "They put a system in place to substantiate that volunteers are part of a program, not just a loose canon," says Marshall.

# VOLUNTEER'S MONTHLY PERFORMANCE APPRAISAL

	UNSATISFACTORY	FAIR	GOOD	VERY GOOD	OUTSTANDING
<b>1. QUANTITY OF WORK</b> Consider volume of work produced and extent to which deadlines are met.	Unacceptable output. Deadlines too often not met. <input type="checkbox"/>	Work output needs improvement. <input type="checkbox"/>	Produces required volume of work. <input type="checkbox"/>	Generally produces more than required volume of work. <input type="checkbox"/>	Work output is exceptional. Produces beyond expected level and frequently beats deadlines. <input type="checkbox"/>
<b>2. QUALITY OF WORK</b> Consider freedom from error, thoroughness of work, exercise of good judgment and ideas production.	Makes frequent errors and/or produces superficial or incomplete work. <input type="checkbox"/>	Acceptability of work needs improvement. <input type="checkbox"/>	Consistently produces acceptable work, makes few errors. Is thorough and shows adequate judgment. <input type="checkbox"/>	Generally produces very thorough and accurate work. Shows sound judgment and has good ideas. <input type="checkbox"/>	Exceptionally thorough and accurate. Shows superior judgment and contributes valuable ideas. <input type="checkbox"/>
2. a. Grammar b. Punctuation c. Spelling d. Use of reference resources e. Use of equipment	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>
<b>3. JOB ATTITUDE</b> Consider willingness and desire to meet assigned objectives.	Resists or shows little or no interest in accomplishing assigned objectives. <input type="checkbox"/>	Is sometimes less conscientious or willing than desirable. <input type="checkbox"/>	Is a willing worker, follows directions and is interested in accomplishing work objectives. <input type="checkbox"/>	Generally shows strong desire to produce. Is a very conscientious and willing worker. <input type="checkbox"/>	Shows exceptional desire to produce. Performs with unusual enthusiasm and conscientious determination. <input type="checkbox"/>
<b>4. EFFECTIVENESS WITH OTHERS</b> Consider degree to which volunteer maintains cooperative relations with others and effectiveness in accomplishing objectives through other people.	Is ineffective in dealing with many people. Causes unnecessary interpersonal problems which interfere with accomplishing work objectives. <input type="checkbox"/>	Sometimes uncooperative or ineffective in dealing with others. <input type="checkbox"/>	Generally cooperative and effective in dealing with others. <input type="checkbox"/>	Very cooperative and effective in dealing with others. <input type="checkbox"/>	Unusually effective in dealing with people. Accomplishes objectives through others under difficult circumstances. <input type="checkbox"/>
<b>5. RELATIONS WITH THE PUBLIC</b> Consider approachability, the desire to assist, ability to put self in place of citizen seeking public service.	Public is antagonized and avoids contact. <input type="checkbox"/>	Indifference is apparent to the public. Acts without imagination in dealing with public. <input type="checkbox"/>	Does not offer help, but gives it willingly on request. <input type="checkbox"/>	Easily approached and responsive, asks questions until able to understand and interpret citizen's problem. <input type="checkbox"/>	Enthusiastic, is sought out by public, readily understands citizens problem. <input type="checkbox"/>
<b>6. ATTENDANCE</b> Consider adherence to schedule.	Does not contact supervisor prior to absence or delay. <input type="checkbox"/>	Occasionally fails to call supervisor prior to absence or delay. <input type="checkbox"/>	Always calls in prior to absence or delay. <input type="checkbox"/>	Whenever possible, notifies supervisor in advance of absence or delay. <input type="checkbox"/>	Whenever possible, notifies supervisor in advance of absence or delay and makes arrangements to reschedule work. <input type="checkbox"/>

Would you, the supervisor, hire this individual for this job? ☐ Yes ☐ No If no, why not? \_\_\_\_\_

Comments: \_\_\_\_\_

Signature of Supervisor \_\_\_\_\_ Date \_\_\_\_\_

(Source: Hampton (Va.) Department of Social Services)

# VOLUNTEER'S ANNUAL PERFORMANCE EVALUATION

Volunteer Evaluated \_\_\_\_\_

Evaluated by \_\_\_\_\_ Position \_\_\_\_\_

Job Assignment(s) \_\_\_\_\_

*Please respond to the following questions:*

I. Evaluate the volunteer's performance (outstanding, very good, average, unsatisfactory, or not applicable) in the following areas:

**A. Quality of Work**

1. Thoroughness in fulfilling duties \_\_\_\_\_

2. Completion of assigned tasks within reasonable amount of time \_\_\_\_\_

3. Demonstration of competence in performance of duties \_\_\_\_\_

4. Implementation of training materials \_\_\_\_\_

5. Ability to identify, refer and/or solve problems on the job \_\_\_\_\_

Please give examples: \_\_\_\_\_

\_\_\_\_\_

**B. Attitude Toward Job**

1. Flexibility \_\_\_\_\_ Comments or example \_\_\_\_\_

2. Dependability \_\_\_\_\_

3. Attendance of training sessions/unit meetings \_\_\_\_\_

4. Promptness \_\_\_\_\_

5. Reliability \_\_\_\_\_

**C. Relationships with Others**

1. Communication with staff \_\_\_\_\_

2. Client rapport \_\_\_\_\_

3. Ability to develop communication with appropriate community resources \_\_\_\_\_

4. Ability to follow chain of command \_\_\_\_\_

II. Did the volunteer demonstrate other significant qualities such as:

A. Leadership \_\_\_\_\_ Yes \_\_\_\_\_ No If yes, please explain. \_\_\_\_\_

B. Assume additional responsibilities \_\_\_\_\_ never \_\_\_\_\_ occasionally \_\_\_\_\_ frequently

III. Do you have any suggestions for further placements of this volunteer? \_\_\_\_\_

IV. Attach any commendations, complaints or other comments reflecting the volunteer's work in current position.

\_\_\_\_\_  
Supervisor's signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Volunteer's signature

\_\_\_\_\_  
Date

(Source: Hampton (Va.) Department of Social Services)



# VOLUNTEER'S PROGRAM EVALUATION

Volunteer \_\_\_\_\_

Job Assignment(s) \_\_\_\_\_

Supervisor \_\_\_\_\_

*Please respond to the following questions. Your input will help make the volunteer program more responsive to your needs, staff needs and client needs.*

## I. SUPERVISION

- A. Were your job duties explained to you by the supervisor before you started work? \_\_\_\_\_ Yes \_\_\_\_\_ No
- B. Did your job include duties not described until you started work? \_\_\_\_\_ Yes \_\_\_\_\_ No If so, what were they? \_\_\_\_\_
- C. When you needed information was your supervisor available? \_\_\_\_\_ Always \_\_\_\_\_ Usually \_\_\_\_\_ Sometimes
- D. When you needed assistance was your supervisor available? \_\_\_\_\_ Always \_\_\_\_\_ Usually \_\_\_\_\_ Sometimes
- E. Did your supervisor make necessary arrangements or provide needed equipment (desk, phone, office supplies)? Always Usually If no, what did you need?
- F. Were you informed of and included in unit meetings, agency meetings and in-service trainings? \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ If not, what did you miss?

## II. TRAINING

- A. What type of training have you received since you started working here? \_\_\_\_\_
- B. Have you been able to use the training material? \_\_\_\_\_ Very Little \_\_\_\_\_ Some \_\_\_\_\_ Quite a Bit \_\_\_\_\_ Almost All  
How have you used the information? \_\_\_\_\_
- C. Were the instructors able to teach you what you wanted to know? \_\_\_\_\_ Yes \_\_\_\_\_ No
- D. Was there a chance to ask questions during the training sessions? \_\_\_\_\_ Yes \_\_\_\_\_ No
- E. Do you have any comments or suggestions for improving training for this position? \_\_\_\_\_
- F. Is there any other type of training you would like to receive \_\_\_\_\_ Yes \_\_\_\_\_ No If yes, please identify. \_\_\_\_\_

## III. VOLUNTEER JOB

- A. Did you find your job challenging and meaningful? \_\_\_\_\_ Yes \_\_\_\_\_ No Comments \_\_\_\_\_
- B. Do you want to continue in this position? \_\_\_\_\_ Yes \_\_\_\_\_ No If no, what would you like to do? \_\_\_\_\_
- C. Did you find your co-workers supportive? \_\_\_\_\_ Yes \_\_\_\_\_ No Please explain. \_\_\_\_\_
- D. Did the staff seem appreciative of your work? \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ Not applicable
- E. Did the clients you worked with seem appreciative of your work? \_\_\_\_\_ Yes \_\_\_\_\_ No \_\_\_\_\_ Not applicable
- F. Were you able to see progress with clients? \_\_\_\_\_ Most of the time \_\_\_\_\_ Frequently \_\_\_\_\_ Seldom \_\_\_\_\_ Never \_\_\_\_\_ Not applicable

## IV. DO YOU HAVE ANY COMMENTS OR SUGGESTIONS FOR IMPROVEMENTS IN THE FOLLOWING AREAS?

Supervision? \_\_\_\_\_

Recognition of volunteers? \_\_\_\_\_

Recognition of staff? \_\_\_\_\_

Job orientation? \_\_\_\_\_

Client services? \_\_\_\_\_

Client follow-up? \_\_\_\_\_

The overall volunteer program? \_\_\_\_\_

Volunteer Signature \_\_\_\_\_

Date \_\_\_\_\_

(Source: Hampton (Va.) Department of Social Services)