

Chapter 11

Supervision, Evaluation and Dismissal of Volunteers



Chapter 11

Supervision, Evaluation and Dismissal of Volunteers

Purposes of this chapter:

- * To learn the unique factors in volunteer supervision
- * To learn key steps in effective delegation
- * To explore methods of supervision
- * To explore the purposes of having volunteer evaluations and some suggested formats to follow in conducting one
- * To learn the reasons and process for dismissing a volunteer and possible alternatives to dismissal
- * To learn how to fire a volunteer (and survive!)

Included in this section:

Thought-Provoking Questions	XI-5
Supervision	XI-6
Uniqueness in Volunteer Supervision	XI-6
Delegation	XI-7
Methods of Supervision	XI-7
Evaluation and Feedback	XI-8
Purpose of Evaluations	XI-8
Sample Forms: Volunteer Evaluation	XI-9
Volunteer Termination	XI-13
Reasons for Resignation	XI-13
Exit Interview	XI-13
Exit Interview Forms	XI-15
Reasons for Dismissal	XI-21
Alternatives to Dismissal	XI-21
How To Fire A Volunteer (and Survive!).....	XI-22
4 Essentials of Firing Volunteers	XI-22
Further References.....	XI-23

Thought-Provoking Questions Regarding Supervision, Evaluation and Dismissal of Volunteers

- 1. Are all volunteers in your organization assigned to a supervisor?**
- 2. What are some special aspects of supervising volunteers which make the process unique and, in some circumstances, more difficult?**
- 3. Are your staff members trained in volunteer supervision and delegation?**
- 4. What style of supervision is given to your volunteers? Is it adequate?**
- 5. Do you have any formal evaluation process established with your volunteers?**
- 6. Do you know why each volunteer leaves your organization?**
- 7. Have you ever had to fire a volunteer?**
- 8. Do you have written procedures to handle the process of firing?**

Supervision

The principles and techniques of good supervision apply to working with volunteers in a very similar fashion to working with any staff employee. There are, however, some **special aspects of volunteer supervision** which must be noted.

Uniqueness in volunteer supervision

1. Before volunteers begin to work with an organization, they should have the supervision and evaluation system explained to them so that it is not a surprise element dropped on them without notice. Paid employees generally assume that there will be supervision and evaluation of their work. Sometimes volunteers do not, and they need to have this explained to them up front. They will generally take this as a sign that the agency is serious about its volunteer program.
2. Another issue is to get initial clarity on who will be the volunteer's supervisor—the Manager of Volunteers or the person directly working with the volunteer. It is always advisable that the staff person working closely with the volunteer provide the supervision. However, both systems include models that work. It is essential to make certain that all parties are apprised as to who is the responsible party for the day-to-day supervision and management of the volunteer.
3. Those who manage and supervise volunteers must be very flexible and accommodating to respond to the special nature of the volunteer. This may often involve handling situations that do not occur in paid staff situations, such as those that arise because the volunteer position may have a lower priority than other things that are going on in the volunteer's life.
4. Volunteers do take the time of the staff who supervise them. This must be understood and planned for in the organization, or staff may become rightfully resistant of volunteers. Volunteers frequently do volunteer work to meet some of their social needs and may, therefore, take additional time from their supervisor to meet this need.
5. Learning a process of productive confrontation will be invaluable in dealing with more problematic supervisory situations. Often managers and supervisors find it more difficult to apply conflict management principles to dealing with volunteer staff. Reading Marilyn MacKenzie's *Dealing With Difficult Volunteers* will help you spot and deal with problem situations with volunteers.

Delegation

A key responsibility of a manager is delegating the work to be done. This can be particularly difficult when supervising volunteers who may do their work at home or at some location other than on-site. Therefore, supervisors of volunteers must be very adept at delegation.

Steve McCurley and Rick Lynch in their excellent book, *Essential Volunteer Management*, suggest when delegating to volunteers, you follow these **principles of good delegation:**

1. **Give the assignment in terms of results**

Don't just give activities for volunteers to follow; share with them what is to be accomplished.

2. **Define the level of control**

Indicate how much authority the volunteer has to make decisions or purchases without "checking in."

3. **Communicate any guidelines**

Volunteers should be forewarned about any parameters or constraints that must shape their decisions.

4. **Make resources available**

It is important that volunteers have assistance and resources that will enable them to successfully accomplish their tasks.

5. **Determine criteria for success**

It is important that the supervisor and the volunteer reach an agreement on how results will be judged.

6. **Set up checkpoints**

To be certain that the job is progressing, times should be established to check in on progress or on any need for change or additional support.

Methods of supervision

Depending on the formality, size and style of the organization, supervision systems can be quite varied. The key is availability to volunteers—whether that be in person, through written reports, or on the phone. Some system should be established and understood. **Various methods include:**

1. Manager has an **open time** during the week when volunteers can schedule time to see him/her or when the manager schedules specific appointments with volunteers.
2. **Monthly meetings** (lunch, breakfast, other) when there is an opportunity for group and individual supervision by the manager.
3. **Supervision by walking around** is often the supervision method in small, informal organizations.

4. When the volunteer works at home or at a site some distance from the supervisor, it is especially important to develop systems to keep the volunteer apprised of activities of the organization and to stay in touch with the progress of his/her volunteer work for you. Often the system involves establishing a regular time to call the volunteer as well as **requesting regular written reports** from the volunteer.

Evaluation and Feedback

Purpose of evaluations

1. Like employees, volunteers also like to know where they stand in regard to their skills and progress. (Polls show that many volunteers volunteer specifically to learn new skills or brush up dormant ones, so feedback is critical.)
2. Evaluations should be a two-way street: a chance for the agency to critique the volunteer, and a chance for the volunteer to share concerns and suggestions about the organization.
3. By implementing periodic evaluations of volunteers, the Manager of Volunteers adds credibility to the department as well as makes a statement that volunteers are held as accountable as paid staff.
4. At evaluation sessions, the Manager of Volunteers can detect signs of burnout or needs for new challenges, and can work with the volunteer to make adjustments in the volunteer's assignment.
5. Volunteers can add their written evaluation as substantive material to references or letters of reference.
6. Evaluation sessions are a great time to recognize and thank volunteers for their contributions to the organization.

Sample forms for volunteer evaluation follow.....

Volunteer Performance Evaluation

NAME OF VOLUNTEER _____ ASSIGNMENT _____

- RATINGS: 1. EXCEEDS REQUIREMENTS
 2. MEETS REQUIREMENTS
 3. NEEDS IMPROVEMENT
 4. DOES NOT MEET MINIMUM REQUIREMENTS

FACTORS CONSIDERED	RATINGS	COMMENTS
	1 2 3 4	
JOB PERFORMANCE:		
Applies knowledge and techniques as taught	_ _ _ _	_____
Accepts feedback positively	_ _ _ _	_____
Asks questions, shares concerns and ideas	_ _ _ _	_____
PEOPLE CONCERNS:		
Adheres to confidentiality policy	_ _ _ _	_____
Relates well to clients and staff	_ _ _ _	_____
Is friendly and sincere	_ _ _ _	_____
Is courteous and tactful	_ _ _ _	_____
Cooperates with staff and co-workers	_ _ _ _	_____
Is neat, well-groomed, adheres to dress code, wears name badge	_ _ _ _	_____
RESPONSIBILITY & MOTIVATION:		
Is dependable (works as scheduled)	_ _ _ _	_____
Is punctual	_ _ _ _	_____
Is loyal, willing to accept responsibility	_ _ _ _	_____
Attends offered training and education programs	_ _ _ _	_____

VOLUNTEER'S SIGNATURE: _____ DATE: _____

SUPERVISOR'S SIGNATURE _____ DATE: _____

Source: Strategies for Success in Volunteer Service Administration, p. 122, published by: The Ohio Society of Directors of Volunteer Services of the Ohio Hospital Association, 1990

River Valley Volunteer Centre

Staff-Aide Evaluation Forms

1. What have been satisfactions you have experienced on the job?

2. What skills or opportunities have you learned or experienced at the Centre?
Do you wish to have any additional job-related experiences which will teach you new skills?

3. What commitment do you feel comfortable making to the Centre in the future? (i.e., 1 day, half days, interest in specific programs, etc.)

4. What suggestions do you have for:
 - a. improving daily procedures at office

 - b. communication between staff

 - c. service to clients, etc.?

Name: _____

Date: _____

Supervisor: _____

Volunteer Termination

Volunteers, like paid employees, terminate their relationship with a particular organization through resignation or dismissal. In either case, it is recommended that accurate records and documentation be kept. Records may be needed to deal with any grievance procedures or to document a volunteer's past work record with the organization.

Reasons for resignation

- Move out of the area
- Volunteer job finished
- Personal or family health issues
- Changes in life situation (divorce, etc.)
- Family obligations
- Return to full-time work
- Loss of interest
- Dissatisfaction with organization, etc.
- Term is up
- Others _____

Exit Interview

It is advised, whenever possible, to have an exit interview with a volunteer leaving the organization. You can gain a great deal of information which can serve other purposes:

- Tracking retention
- Recognizing and thanking volunteers
- Locating problems within a particular department or aspect of the organization (i.e., many volunteers staying a short time/leaving early)
- Detecting any recruitment problems (i.e., not accepting the right kind of person for the job)
- Hopefully preventing any bad feelings traveling out to the community by apologizing for any problems caused by the agency
- Providing closure to the relationship

Exit Interview sample forms follow.....

EXIT INTERVIEW QUESTIONNAIRE

We are always striving to improve the performance of our volunteer management system. As one of our volunteers, we would appreciate your help in identifying areas in which we might do better. Please be as complete and honest as you can in answering the following questions—all of the information collected will be kept strictly confidential, but it will be utilized to ensure that others who volunteer will receive the best possible treatment.

How long did you volunteer with us? _____

Types of volunteer positions held:

1. _____
2. _____
3. _____
4. _____

Why are you leaving? (Check all that apply)

- | | | |
|--|--|---|
| <input type="checkbox"/> Job accomplished | <input type="checkbox"/> Moving to a new location | <input type="checkbox"/> Need a change |
| <input type="checkbox"/> Didn't like the job I was given | <input type="checkbox"/> Didn't feel well utilized | <input type="checkbox"/> Other time commitments |
| <input type="checkbox"/> Other: _____ | | |

What did you like best about volunteering with us?

What suggestions would you make for changes or improvements in our volunteer effort?

Overall, how would you rate your experience in volunteering with us?

TERRIBLE			AVERAGE			GREAT
1	2	3	4	5	6	7

Please return this form to:

Name: _____

Address: _____

Volunteer Exit Questionnaire

ASSIGNMENT _____

I LEFT BECAUSE _____

THE MOST SATISFYING PART OF MY ASSIGNMENT WAS _____

THE LEAST SATISFYING PART OF MY ASSIGNMENT WAS _____

THE ORIENTATION AND TRAINING I RECEIVED WAS _____

TO IMPROVE THE PROGRAM I WOULD _____

I WOULD RETURN IF _____

COMMENTS: _____

SIGNATURE (OPTIONAL): _____ DATE: _____

Source: *Strategies for Success in Volunteer Service Administration*, p. 124, published by: *The Ohio Society of Directors of Volunteer Services of the Ohio Hospital Association*, 1990

A SUGGESTED EXIT INTERVIEW FORM

(To be completed by the volunteer)

Date: _____

Name: _____ Telephone: _____

Address: _____

Reason for leaving the Red Cross: _____

Please indicate your most satisfying and least satisfying experiences in the Red Cross:

Most satisfying: _____

Least satisfying: _____

Was your work setting, office space, desk, phone, etc., satisfactory?

Yes No

Explain: _____

Were your working relationships with volunteer and/or paid staff satisfactory?

Yes No

Explain: _____

Do you feel that you had adequate support and supervision?

Yes No

Explain: _____

Do you feel that you received sufficient training for your position?

Yes No

Explain: _____

(over)

Do you feel that you made a significant contribution?

Yes No

Explain: _____

Do you feel that your work was appreciated?

Yes No

Explain: _____

Will you consider a volunteer position with the Red Cross in the future?

Yes No

Explain: _____

Additional Comments: _____

Volunteer's Signature

Interviewer's Signature

Reasons for dismissal

On rare occasions, Managers of Volunteers are faced with the unpleasant task of dismissing a volunteer. It should be noted that unless you have a good management system in place (clear job descriptions, orientation and supervision, etc.) it is very difficult to fire a volunteer. Most often firing is neglected, frequently with high costs to the individual and the organization.

Generally volunteers can be dismissed for the following reasons:

- Misconduct
- Unsatisfactory performance
- Breach of confidentiality
- Inappropriate behavior
- Disregard of policies and procedures
- Health unacceptable to the point of being a hazard to self and others
- Suitable assignment not available

Alternatives to dismissal

If the infraction is such that immediate dismissal is not called for, you may consider the following **alternatives to firing**:

1. Give a warning and develop a plan to improve behavior.
2. Provide additional training which may enable the volunteer to perform better.
3. Place in another more suitable job in the organization.
4. Refer to a Volunteer Centre or other agency for more suitable placement.
5. Retire the volunteer. (This is the delicate situation in which a person is unable to do a satisfactory job due to increasing mental, physical or aging problems.) You might plan a nice retirement party honoring the volunteer for his/her service.
6. Reassign to a different person in the organization (if the problems stemmed from a poor personality match).

How to fire a volunteer (and survive!)

It might be difficult to imagine yourself firing a volunteer, and often it is nearly impossible to do because the organization does not have the appropriate systems in place to perform a termination. When in doubt, use standards in place in the organization for firing a paid employee. Remember, however, that a volunteer must be clearly informed of his/her role and responsibilities through a clear job description and must understand from the start of the relationship that certain standards and expectations must be met for the success and continuation of the relationship between the volunteer and the organization. Remember: volunteers fire organizations frequently when they do not meet up to the volunteers' expectations. Occasionally, too, volunteers must be dismissed from the organization.

4 essentials of firing volunteers:

- (1) As a part of orienting each volunteer, you should give him/her a copy of the agency policies on termination, including a policy on suspension and grievance procedures. This provides volunteers with forewarning that volunteers can be terminated. It also assures salaried staff that volunteers can be dismissed from the organization.
- (2) With few exceptions (i.e., observed harm to clients, theft, etc.), volunteers should not be fired until you have had 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, and always document, in writing, your investigation and conclusions. It is advised that you confirm the termination in writing with the volunteer.
- (3) Firing volunteers should be handled fairly and with the utmost diplomacy. Don't apologize for your decision. Allow for an appeals process.
- (4) Provide notification to staff, clients and others who need to be informed that the volunteer will no longer be working at the organization.

Further References

Supervision, evaluation and dismissal of volunteers

- Lynch, Rick, Precision Management (Abbott Press, 1988). Chapter 7, "Delegating for Results," pp.123-139.
- MacKenzie, Marilyn, Dealing With Difficult Volunteers (VM Systems and Heritage Arts Publishing, 1988).
- McCurley, Steve and Rick Lynch, Essential Volunteer Management (VM Systems and Heritage Arts Publishing, 1989). Chapter 8, "Supervision Systems," pp. 97-106.
- McCurley, Steve and Sue Vineyard, 101 Ideas For Volunteer Programs (VM Systems and Heritage Arts Publishing, 1986). Chapter V "Leadership, Supervision and Recognition," pp. 47-60.