

The Fourth R: A Case for Releasing Volunteers

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Volunteerism's three basic "R's"--recruitment, retention and recognition--receive considerable attention. These are indeed very important capsule words describing points in our relationships with volunteers in our organizations. We tend to assume that if these three R's are working properly, we will have good volunteers and will have them forever or at least indefinitely.

The problem this creates is that most volunteers do not stay forever even if volunteer programs are well organized and, more importantly, even if the volunteers have enjoyed their work and have performed satisfactorily. Furthermore, there are some volunteers we hope will not stay forever. Indeed the firing of volunteers is the form of release which has received most attention. Nevertheless, we tend to avoid preparing even for that kind of situation and then get caught off guard each time an unpleasant case develops.

The premises of this article are:

1) There are actually four "R's" in our relationships with volunteers: recruitment, retention, recognition and release.

2) Volunteers--even good ones--should not stay forever or even indefinitely.

3) Professional volunteer administrators must understand the reasons

for release and must build a structure to address it. Getting caught off guard is not a professional stance. Release must be as intentional and mutual as recruitment.

4) Exploration of the ending point, i.e., the release phase, of our relationships with volunteers is a good starting point for evaluating a total volunteer program.

5) Building an effective release component is like all other professional efforts in that it requires us to replace wishful thinking with an intelligently sound frame of mind and then to develop an appropriate framework for action.

This article is intended as a tool for qualitative analysis. In it we will pose some questions and propose some answers which can help us achieve a productive balance between what is and what ought to be as we deal with the issue of releasing volunteers.

ESTABLISHING A USEFUL FRAME OF MIND

Most situations and issues lend themselves to several interpretations. A strong and legitimate case can often be made for each of various positions even though they may contradict one another. Therefore, it is practical to look at the alternatives and select the one which is

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most consistent with our philosophy and most likely to move us toward achieving our objectives. The concept of release forces us to come to grips with basic assumptions about volunteerism by raising some important questions.

1) Are volunteers as free to leave as we think?

Yes and no. Of course, volunteers can leave a particular assignment without having to weigh some of the consequences that would result from leaving a paid job, not the least of which is concern about the source of their next meal. Of course, anything volunteers do is something which they did not have to do and which might well not have been done to any degree if they had stayed home. Furthermore, human service work is never done. No one person can be all things to all people for all times. So, many assume, volunteers are free to leave with a clear conscience and some sense of satisfaction.

It is not, however, as simple as that. Volunteers may technically be free to leave at the drop of a hat. Yet many--alas, not all--do not feel that way. Good volunteers in particular feel more accountable than has often been acknowledged. They undertake their work for reasons related to meeting certain personal needs and to being useful to a cause or organization they believe to be important. They invest considerable time and energy (both psychic and physical) and expect the payback of feeling and being useful. They understand the magnitude of the unfinished business. For any number of perfectly legitimate reasons, volunteers will need or wish to leave. The serious ones do so only with considerable thought and not without a certain sense of defecting rather than departing. If they are then treated as defectors, they may be haunted by guilt or smothered by anger and frustration. This may sour them not only on a particular organization or volunteer position but, if it happens too often, on all volunteering.

In other words, volunteers are free to leave, but they often pay a price for leaving. The greater the original commitment to the work at hand, the higher that price. It is not in anyone's best long-term interest to allow our attitudes and practices toward them when they do leave to increase that price further. Recognition of release as a natural phase in a mutual relationship shows respect for the volunteers' right to mobility and for their commitment to service.

2) Is turnover bad by definition?

Yes and no. Changes in personnel, whether staff or volunteer, cause a certain amount of disruption. They require the remaining personnel to cover the work while replacements are found, to find replacements, to orient and otherwise break in newcomers, and to adapt work patterns and relationships to the new personalities and styles. All of this takes time and energy which often seems like (and may well be) a diversion from the tasks at hand.

Yet sometimes such changes are welcome for obvious reasons. Perhaps the departing persons were always ineffective or obnoxious. Perhaps they had done well for a time but had gone stale. Turnover on these occasions is a time of relief and revitalization for those remaining on the scene. The tasks required to replace personnel are undertaken with an enthusiasm often bordering on glee because of the opportunity which has been created to improve a less than desirable situation. What distinguishes these instances from those in which the departure creates an unwelcome hole is the amount of time and energy that had been spent bemoaning the need to change.

While we find it harder to view an unwanted departure as a positive opportunity, it can be one, nonetheless, if we do not aggravate the situation by indulging in excessive expressions of disappointment and frustration. Properly viewed, a turnover challenges all involved to reassess the

situation, redefine work assignments as appropriate, and start again refreshed.

Turnover is bad only under certain conditions:

- when it is unanticipated;
- when it is untimely in relation to the work load;
- when it occurs so frequently that a hard look at positions, patterns and structures is in order; and/or
- when more time and energy is spent decrying it than dealing with it.

So far, this discussion of turnover has been equally applicable to paid and volunteer personnel. There are other factors which may be particularly germane to volunteers. For example, one of the characteristics volunteers can bring to certain tasks is the freshness it is possible to generate and regenerate precisely because the individual does not do them full-time. If the tasks are inherently tedious or, at the other extreme, intense and demanding, there is little to be gained from obligating volunteers to stay past the point when they can bring that freshness.

Also, because volunteers are not dependent on their positions for their livelihood, they have less to lose than staff by questioning the status quo. If our assessment is that they have been committed and effective, their reasons for departing may provide clues to larger problems in the organization which should be addressed. Of course, their reasons may be exclusively personal. The point is that it is important to find out the real reasons for the turnover.

A change in volunteers may be more desirable and easily accomplished than a change of paid staff and may help everyone combat stagnation, bureaucratization and cooptation. But please note: the suggestion that volunteer turnover may be more manageable and less costly than staff turnover is not the same thing as saying that we should therefore encourage volunteers to flit in and out.

Nor does it mean that in difficult situations we should assume or allow others to assume that the volunteer is the problem variable.

3) Should there be a double standard for volunteers and staff?

Again the answer is yes and no. It is perfectly appropriate to acknowledge that volunteers have families and jobs which must take priority over and may even sometimes interfere with their assignments. We know where we expect our staff's priorities to be. Volunteers rightly expect more flexibility than staff in defining their hours, work load and tenure. However, this is true only up to a point--the point at which their availability, reliability, and/or capability cease to contribute to the work of the organization. The challenge, as we well know, is to acknowledge and accommodate this form of "double standard" while simultaneously encouraging and expecting accountability from the volunteers.

Closely related is another form of double standard which has some validity: hiring practices. On the one hand, no one expects to hire everyone who walks in the door looking for paid employment. Nor do we agree to serve every potential client who may appear if that person's needs are not those we serve. On the other hand, it is widely assumed by volunteers as well as staff that, if a prospective volunteer shows up on an organization's doorstep, "hiring" is a foregone conclusion. This has led on occasion to some pretty fancy footwork to develop an appropriate slot, if existing ones do not fit the bill. In some instances, this effort has benefited both the volunteer and the organization. But, when the prospective volunteer's needs, expectations, and skills are out of step with organizational requirements, making up work for that person distracts staff from focusing on the organization's primary goals.

This issue surfaces more and more

frequently as volunteers are in greater demand yet traditional sources are in less supply. Volunteer administrators are turning to--and being expected to turn to--new sources of volunteers such as patients who are assigned to the volunteer department as part of their therapy or lawbreakers who are assigned community service work in lieu of fine or imprisonment. At the same time, volunteer administrators are trying to professionalize and upgrade their programs and to secure a respected place for the volunteers in the organization's personnel roster.

Can we have it both ways? That remains to be seen, and the answer is likely to be yes if we can look for answers in shades of gray rather than black and white. There may in fact be greater flexibility and more possibilities in the hiring and placement of volunteers than in selecting paid personnel or accepting clients. The double standard which says a volunteer should never be turned down may be justified, if it is not carried to ridiculous extremes.

Some forms of double standard, however, are not helpful. Some staff are hostile to the whole concept of volunteers--period. Others are at least moderately leery of risking too much on volunteers. Whatever the case, many paid staff tend to expect instant compatibility and perfection from the volunteers assigned to work with them. If such is not forthcoming, these staff tend to write off volunteers altogether rather than face up to the fact that, if these individuals were paid, they would assume that they had to learn how to work together.

Nearly everyone, however positive their feelings about volunteers, succumbs to another variation of the double standard. It is assumed that when we pay people, we can demand accountability and, therefore, that we get it. Has it really been our experience that paid staff operate at full capacity and high levels of per-

formance every minute on the job? It is accepted that paid staff will leave if they find or receive a better job offer. It is understood that such opportunities may not permit a departure at the least disruptive time. When paid staff do leave suddenly, we may sigh, but we carry on without concluding that paid staff are unreliable. When volunteers leave for greener pastures, do we extend them the same courtesy?

Whether the personnel in question are paid or volunteer, it is important to have policies and practices which promote accountability and the highest levels of performance possible without ignoring the reality that all individuals have idiosyncracies and limitations as well as strengths. A double standard which does not give respect and dignity to both volunteers and paid staff is not only unnecessary but is also unhealthy for individuals and organizations.

4) Is release merely a euphemism masking unmanageable realities?

So far in this article we have simply reopened a Pandora's box of issues and problems widely recognized in volunteerism. To make matters worse, it was suggested at the outset that, in addition to finding enough volunteers and using them effectively, we should be spending time planning how to let them go. If release figures in at all, does the word not imply more control than we really have? Is it not a glorified way of saying that the volunteers were going to leave anyway but we need to save face? Certainly it is a concept which can be used as pseudo-professional jargon to distract attention from poor programs and to rationalize that all turnover is healthy.

On the other hand, the concept of release can serve as an important indicator that we are in control of the situation whether or not we control all of the factors in it. We know that turnover will occur. We also

know that it is not necessarily unhealthy or unwelcome and may in fact be the opposite. Therefore we do not have to act surprised and dismayed every time it occurs. What we are trying to head off are unplanned or unanticipated departures, unmanageable disruption, and misguided energy spent wringing hands and gnashing teeth. We should also be heading off excessive reliance on any one individual or group, however effective the short-term results. As we shall see in the next section, there are many specific and positive ways to handle release if we are ready to acknowledge it as the "fourth R."

Before we launch into action suggestions, it may be helpful to remember that release is an already established concept in some kinds of volunteering. Effective organizations build explicit terms into job definitions for their policy volunteers, i.e., board and committee members. These terms are customarily combined with a system of rotation which balances newness with continuity. Under such a system even the best policy volunteers are dismissed when the time comes. Terms are implicit in certain kinds of operations volunteering as well. For example, teacher aides, youth advisors, Scout leaders and the like generally assume that they have signed on for the current school year with, of course, the option to "re-up." This is a reasonable attitude when one understands the extensive demands these positions entail. It is useful to contemplate the degree to which knowing the end is in sight has helped many such volunteers endure until an appropriate departure time. (What is less reasonable is the unstated but usually clear assumption by those in charge that, of course, these volunteers will re-enlist after their "vacation" and that, if they do not, they have somehow reneged on their commitments.)

Granted, it is perhaps easier to accomplish release in policy volun-

teering because the work is done in groups by definition and provision is made for the absence or departure of any one member through quorums, vacancy procedures, etc. However, that does not discount the value of this model regarding the release of all volunteers. With the ending time defined, everyone has a reference point on which to base decisions, and no one is allowed to forget that plans must be made for turnover and release.

ESTABLISHING A FRAMEWORK FOR ACTION

Using the conclusions reached so far about why we must learn to release volunteers and why that need not be such a threatening proposition, we can build a framework for action. If, as proposed, release is to be an analytical tool as well as a stage in relationships, we should start with that and see what light it sheds on those other stages.

What are the conditions and situations in which release becomes an issue? Several have been strewn throughout this discussion so far:

- Changes in the volunteers' personal, family or job situations require them to reassess and realign priorities at the expense of their volunteer work.
- The volunteer is not performing adequately.
- The volunteer will not perform adequately.
- The volunteer's performance has slipped, or attitudes have changed, indicating burnout.
- The volunteer has been placed in an unsatisfactory, perhaps even untenable position (e.g., with reluctant or hostile staff) and burns out quickly--or gets burned up.
- The volunteer coordinator sees long-term potential for a specific volunteer or situation and wants to head off all of the above.

With the possible exception of the

first item, we can have considerable control over release if we build adequate controls and guidelines into the other phases of our relationships.

1. Pre-recruitment

Before we undertake contact, it is essential that general volunteer personnel policies and specific job descriptions be in order. They should reflect the most thorough and appropriate definitions which are possible in a given situation. They must define, in addition to hours and days, the maximum term of commitment expected because of the inherent nature of the tasks, the potential for burnout, and because an organization may choose not to become too reliant on any one individual. Other things to include in a volunteer job description are: requiring participation in meaningful training and orientation; suggesting or requiring a "trial period" (a minimum term of commitment) which gives volunteers and staff a reasonable time to learn and adjust and then to make an informed mutual decision about whether or not this is the right person in the right slot; and requesting notice if volunteers have to resign and spelling out how that should be done.

Clearly provisions such as these serve organizational interests by performing and structuring accountability. What may be less clear is how volunteers, accustomed to calling the shots, will perceive such standards and definitions. Many--particularly experienced ones--will appreciate it. This is a fact we too often ignore. Others may find that their suspicions are eased by the explanations that such terms are important for their protection and satisfaction as well as those of the organizations. Those who remain totally repulsed may offer us a blessing in disguise by opting out from the start.

2. Recruitment and Pre-release

In preparing for recruitment, we are caught between conflicting im-

ages. If the positions we offer were paid, we would probably have a waiting room full of people willing to "take a number" and to tolerate even the most callous handling by the personnel department. However, when the positions are volunteer, we usually have to go looking for candidates and, when we find some, feel we must take them on any terms. "Beggars can't be choosers" is all too often in the back of our minds, even though we should know better.

It is essential to treat the recruitment process as an extended mutual exploration of the potential fit between a volunteer and an organization or position. If the work is particularly sensitive or demanding, checking of references and prior experiences is especially important. No matter how urgently we are seeking to fill a specific slot, it is helpful to have handy a number of options in case the recruitment discussions take unexpected turns.

It is equally essential to recognize that there will be times when our information and instincts tell us correctly that all the creativity and flexibility in the world is not going to produce a "fit." In such cases pre-release is the best form of release.

Pre-release does not mean a harsh, "don't call us; we'll call you." Often it invites referral to another organization or to a volunteer clearinghouse where the person can find a more appropriate placement. In the short run, pre-release can be very awkward since we must take care not to make the volunteer feel rejected as a person. It can also be frustrating because it requires us to continue recruitment efforts. Yet, if the situation is already uncomfortable, is it really easier to give it a try and to deal with the consequences later? In the long run, both we and the volunteer will benefit from an honest decision at the start.

3. Periodic Evaluations and Check-points

Formal and informal communica-

tions with volunteers and their staff associates on a regular basis are standard operating procedure in good volunteer programs. Such contact enables volunteer administrators to demonstrate that they care what is happening to the people in various situations, to ascertain how things are going, and to identify potential problems. What an awareness of the release dimension adds is a reinforcement of our understanding that this communication must be more than a passing exchange of pleasantries. To be meaningful, such contact must be given priority. Adequate time and energy must be budgeted for planning as well as executing productive communications. Such effort does not eliminate the question of how and when volunteers will leave or be released. It does, however, provide greater opportunity to prepare for that time and thereby to minimize difficulty and disruption.

RELEASE

Release itself comes into question in one of two ways. Either the volunteer administrator initiates it, or the volunteer does. In the first instance we are usually confronted with a problem situation for which the best or at least most workable alternative for solution is to remove the volunteer. If we have been doing our job along the way, this situation will not come as a surprise. Other alternatives and accommodations may well have been tried and found unsuccessful. It is important that the volunteer administrator play an active role in this process rather than hope that "they" will work it out. This participation gives the administrator essential information for resolving any long-term questions which underlie the specific, immediate problem and provides opportunity to protect the rights and feelings of the individuals involved. It increases the chances that a win/win solution will be found for the individuals and for the future of the volunteer program.

1. Firing Volunteers

Removal of a volunteer does not necessarily mean dismissal. More often than not, it involves reassignment within the organization or referral to another one so that a potentially valuable volunteer is not lost. However, there are times when removal is dismissal--or should be. This writer has done in this article what we do in practice: put off any mention of the actual firing of a volunteer until all other possibilities (and perhaps we ourselves) are exhausted. While personal exhaustion is not recommended, a careful and thorough testing of alternatives is. No one should be discharged without cause and without prior notice. Firing is not easy on anyone, including the person doing it, nor should it be.

Certain behaviors by paid or volunteer personnel cannot be tolerated by a responsible organization: outright harm to clients; inappropriate public statements; flagrant and willful violation of policies and procedures; etc. If a person's performance is irredeemably inadequate or if his/her attitudes are so recalcitrant and disruptive that the morale of other personnel is understandably low, what is really gained by permitting the situation to drag on? The risks of one "fired" person badmouthing our program may well be outweighed by the support we will have from other sources.

If firing is the only real option, do it and get it over with, with the same firmness and tempo advised for removing adhesive tape from skin. (It is to be hoped that firing is not something we get to practice regularly. Since it may then be hard to be confident about what to do and since you may still be hoping for at least one very specific "how-to" suggestion in this article, here is one for your consideration. If you have to fire a volunteer, rehearse the interview and roleplay it with another volunteer administrator or someone you can trust to be objective even though sympathetic to your situation.)

2. Volunteer-Initiated Release

Less formidable but equally distressing are the release situations initiated by volunteers whom we would like to keep. Our first response to such cases should be to determine exactly why the person wishes to leave, a volunteer counterpart to the exit interview used with paid staff. If the reasons are not exclusively personal, we may gain valuable insights about our programs. However, once it has been determined that the volunteer's decision is appropriate, necessary and/or final, it is crucial that we as the organization's representative LET GO--not with a begrudging reluctance but with sincere yet modest expressions of regret, hearty thanks, an invitation to return and an offer of referral or references. Prolonged and inordinate pleading to stay on is flattering to the volunteer only up to a point. Ultimately it adds to the person's discomfort and may confirm that it is indeed time to leave.

ANALYSIS AND REFLECTION

Most of what has been discussed thus far has immediate application to our day-to-day dealings with people. These dealings consume most of our time. Equally important, however, if we wish to professionalize ourselves and our programs, are the time and effort spent thinking about what is happening and why.

First, it is critical to keep formal records and informal notes which will enable us to analyze program results including turnover and release. Such information in the aggregate offers useful facts and clues about patterns and problems which we can use to strengthen our programs. It may also unearth and provide documentation for questions which are not best answered exclusively within the volunteer program and by the volunteer administrator. For example, if a large number of hard-to-place volunteers are referred or assigned to a program, it is quite possible for a sensitive and creative volunteer ad-

ministrator to create good assignments and to make it work. It is also possible that, in this same situation, the amount of effort required to achieve effectiveness is out of kilter with the organization's priorities. Or, if volunteer turnover recurs only in a certain area, this evidence may suggest that the problem is really in the structure of assignments or with certain individuals who are not supervised by the volunteer administrator. In cases like these, it is appropriate and necessary to share data with others in the organization and to seek solutions at the proper level of decision-making.

Secondly, volunteer administrators must review and reflect on their own professional performance as objectively and thoroughly as possible. By its very nature, professional work is very much like a kaleidoscope with the same ingredients floating around but always appearing in a new configuration. Since one of the ingredients in the release process is our participation as administrators, it is vital that we understand what we have done. Actions, reactions and non-actions should be evaluated along with all the other variables so that future efforts will be more intentional and effective. The suggestion that we gear up for the worst case of release (firing) by roleplaying and other preparation applies to other aspects of our work as well.

To summarize, incorporation of release as the legitimate fourth R of a good volunteer program is not a tacit admission of failure or the passive acceptance of unpleasant realities. Properly understood and utilized, the release concept and its applications enable us to actively promote everyone's best short- and long-term interests as we promote specific volunteer programs and volunteerism in general.