

174

# Volunteerism

---

THE "NEXT TO PERFECT" FORMULA FOR  
SUCCESSFUL VOLUNTEERING  
A Handbook for Supervisors of Volunteers

---





Donna Jean Carter, Ph.D.  
Superintendent of Schools

Independent School District 281  
4148 Winnetka Avenue North  
New Hope, MN 55427

©1984 by Independent School District 281. All rights reserved.

## TABLE OF CONTENTS

Preface.....	1
Welcome.....	2
Consider Having a Volunteer.....	3
Supervising Volunteers Is a Challenging Responsibility.....	4
Common Concerns of Volunteers.....	8
Building Confidence.....	10
Check List for Effective Supervision of Volunteers.....	11
Identifying Your Needs.....	12
Securing Support.....	16
Recruiting Volunteers.....	19
Attracting Volunteers.....	21
Effective Communication Is a Key to Success.....	25
Orientation and Training.....	32
Communications.....	35
Documentation.....	45
Recognition.....	48
Epilogue.....	51
About the Authors.....	52

## PREFACE

THE "NEXT TO PERFECT" FORMULA FOR SUCCESSFUL VOLUNTEERING: A HANDBOOK FOR SUPERVISORS OF VOLUNTEERS is written specifically for individuals who are responsible for on-site supervision, direction, and support of volunteers. As a supervisor, you are the link between the administration, staff, volunteer, and the direct recipient of services. It is our hope that the ideas presented here will be helpful to you in developing this art.

We are confident that the involvement of volunteers in your program will provide new avenues for enriching and expanding the opportunities you envision for those you assist.

While we recognize that no human interaction can be completely perfect, we believe that this booklet outlines the "ideal" components of successful volunteer experiences. It is a hands-on resource book to be adapted to the needs of your situation. This booklet and your commitment, hard work, and experience will put you on the path to successful volunteer supervision.

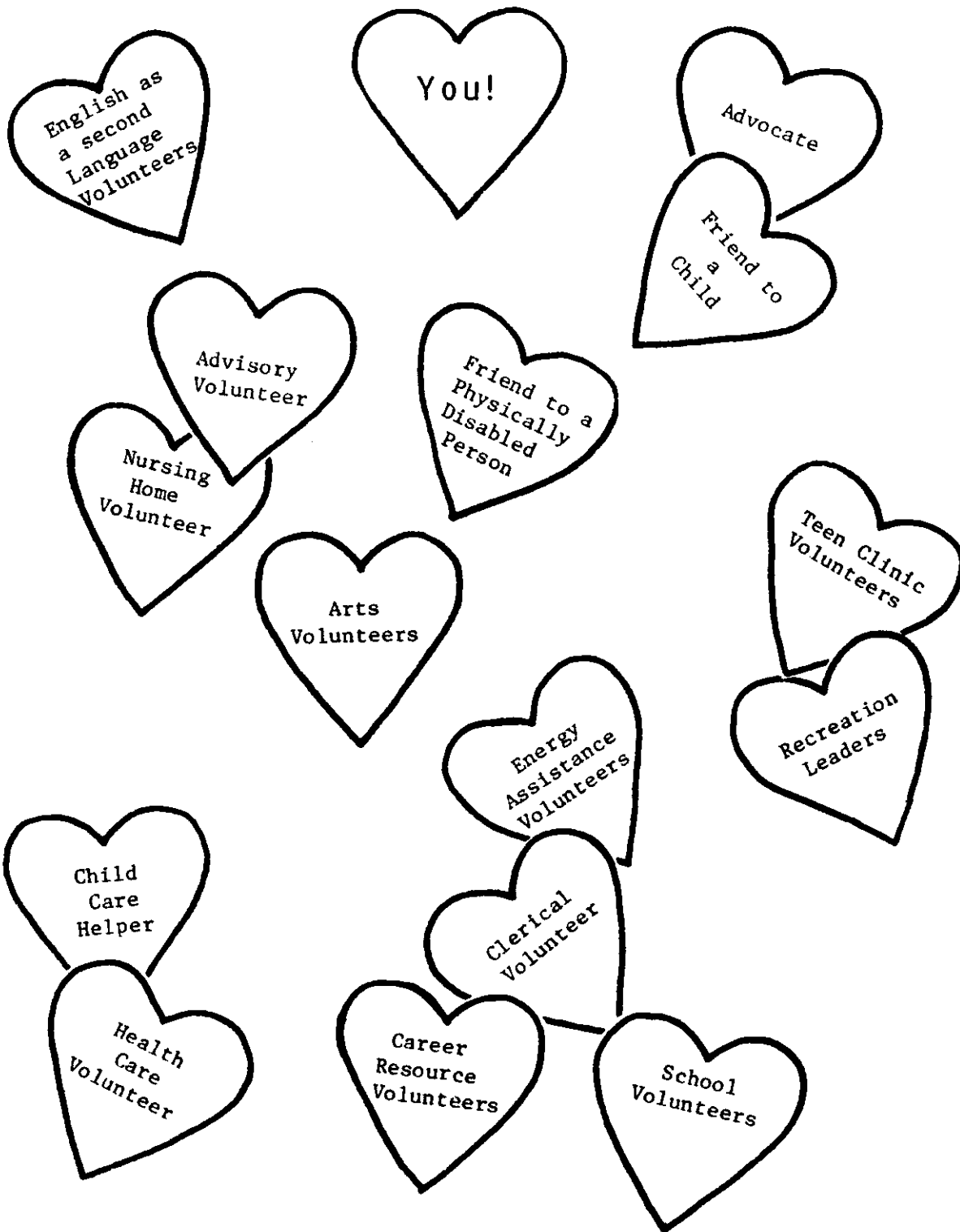
-- Paula Beugen

Mary Robinson

Dawn Wanous

Proceeds from this booklet will be dedicated to Volunteers In Action to support and promote volunteer services in the District 281 area.

WELCOME TO THE WORLD OF VOLUNTEERS!



TOGETHER WE CAN MAKE A DIFFERENCE!



**CONSIDER HAVING A VOLUNTEER:** There are as many different reasons for involving volunteers as there are creative supervisors. Identifying your goals and needs will enable you to most effectively use the resources and talents of volunteers.

Some reasons to involve volunteers are to:

- Try/test new ideas: Sometimes you envision ideas or dream dreams which cannot be tested without help. Together you and a volunteer can experiment and evaluate progress toward a goal.
- Relieve self of detail: Because of demands upon your professional time, you may find it helpful to delegate some of your tasks. Your time may then be spent in your areas of expertise while other detail work is performed by a volunteer.
- Increase enrichment opportunities: Dollars will never buy all the opportunities you would like to provide. The volunteer community is waiting to be tapped.
- Provide individualized attention to recipient needs: Everyone needs personal attention. With the assistance of volunteers you can provide more opportunities for individualization.
- Bring in new resources, ideas, and skills: As you and the volunteer work together, you may discover that your ideas intermingle to form a new concept that you may wish to incorporate into the program.
- Furnish role models: In our society, where role models are not always available, volunteers provide a resource of role models.
- Offer intergenerational, multicultural contact: Volunteers can provide opportunities to expand relationships which cross cultural or generational lines.
- Give friendship opportunities: Providing special friendship is often not within the role of staff, but would be one of the most beneficial services that could be provided. Volunteers often successfully meet friendship and other social-emotional needs.
- Supply advocacy initiatives: Volunteers have initiated and supported ideas which have become major forces in raising the consciousness of society, i.e., the peace movement, conservation, ecology, human rights, and women's rights.
- Secure community support: Volunteers develop a loyalty to and understanding of the agencies in which they work, becoming facilitators of increased community support for needed services.
- America has a tradition of people helping people.

**SUPERVISING VOLUNTEERS IS A CHALLENGING RESPONSIBILITY:** It is a demanding and satisfying endeavor. In order to fully meet the needs of your community, we believe that the contributions of volunteers are worth the effort involved.

Staff members who are considering initiating volunteer components to their program often hesitate because of the concerns listed below. However, as you carefully review this booklet, you will become conscious of the fact that proper administration and a carefully managed volunteer program will diminish these feelings. It is important to weigh proportionately the benefits with the probable drawbacks. When making the decision to involve volunteers, keep in mind that you are a key to successful volunteer efforts.

#### CONCERNS AND PREVENTATIVE TECHNIQUES

- Amount of Work and Time Involved

Set aside a block of time for planning purposes. Estimate how much direct service the volunteer will provide over "x" period of time. Weigh benefits versus demands on your time. Your time investment plus interest equals a motivated volunteer and greater output. Recognize that the initial investment is greater, but rewards come later with reduction of supervisory time and provision of greater services. Only you can decide the answer to how much time and what outcomes justify the best use of everyone's time.

- Confidentiality -- Both Within the Setting and With the Staff

Explain to volunteers that situations they observe and resulting conclusions they may draw are likely to be confidential. Define and present what you consider to be confidential information. Make your definition as personal as possible and give ramifications. Gradually move people into responsibilities

that require confidentiality. This will give you an opportunity to monitor each individual's understanding of your definition of confidentiality. Emphasize that no exceptions with regard to confidentiality will be tolerated. Request that any uncertainties be clarified with you.

- Dependability

Dependability is a two-way street. Establish procedures for communication -- whom to call -- what time. Schedule field trips, vacations, etc., in advance and clarify rotating schedules. Set an example by consistently notifying the volunteer of schedule changes. With careful orientation, dependability will be stressed, and unreliability addressed at the onset. Persistent unreliability is a valid reason for termination.

- Philosophical and Personal Incompatibility

It will be helpful to carefully examine your personal philosophy and develop a mission statement of why you want a volunteer, including your goals and purposes. In the interview process you will determine compatibility. Having a clearly delineated job description will attract the right person for the right job. For example, if you intend to preselect all materials used, the volunteer job description will state: "Detail oriented individual able to accept direction. Materials will be provided." On the other hand, if you are looking for a leader, the description might read: "Energetic, self-starter able to plan and implement." This will give clues and attract the desired qualities of a volunteer who would be more independent, with the option of selecting materials and planning his/her own work.



Things to be considered when selecting a volunteer:

- . Role of the volunteer in this position.
- . Qualities and qualifications desired.
- . Amount of time required for this specific volunteer position.

Work styles will emerge with time, at which point adjustments in the volunteer's role may be necessary. Some individuals may be unaware of their work styles. Some may see themselves as followers and actually be leaders, or vice versa.

As a volunteer develops, you may recognize the need for a change in his/her role. This can be done by either revising the volunteer's job description or by allowing the volunteer to move on to another volunteer position. Should you discover that it is no longer mutually beneficial to continue together, a new recruitment appeal may be initiated to meet your original or revised job description.

- Liability

As a professional, it is important to use discretion regarding volunteer positions and policies. You will sense where it is necessary to draw lines based on your experience, professional judgment, and comfort level in each situation. Weigh benefits (advantages) versus drawbacks (liabilities) in setting priorities and making your decisions.

Have a concrete system for supervision:

- . Demonstrate method of supervision.
- . Indicate where the volunteer will work and how his/her services will be monitored.
- . Obtain permission slips.
- . Be knowledgeable of insurance coverage.
- . Know professional standard of the field (or code of ethics).
- . Inquire about physical limitations of the volunteer that specifically relate to the volunteer position.
- . Ask only questions that are job related.
- . Ask for a liability waiver.
- . Consult with a business affairs manager or attorney about matters that require clarification.

Although it is impossible to foresee every situation or to know how legal judgments will be made, these steps will strengthen your ability to carefully supervise a given situation.

COMMON CONCERNS OF VOLUNTEERS: Volunteers as well as staff often feel uneasy in new situations, particularly during the initial phase of the volunteer experience. Training, along with some practical experiences, helps to prepare volunteers for their responsibilities.

Some volunteer questions may be:

- Will I be qualified and capable?

Relevant training, effective communication, and experience lead to feeling more competent.

- Will I be meeting a real need?

Helping volunteers to understand how their task fits into the overall goal will help volunteers recognize the value of their efforts.

- Will I know how my role fits into the overall program?

Explain the impact of their presence. Be as specific as you can. Create an atmosphere which welcomes questions and provides opportunities for communication. This will help volunteers to personally understand the value of their services.

- Will there be sufficient training and support?

Training and support are essential in helping volunteers to be effective. Beyond basic training and orientation, ask volunteers about areas in which they feel unsure, and tailor in-service training to those needs.

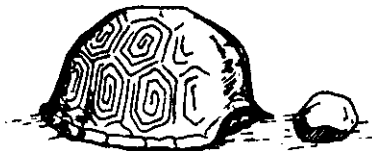


- Will there be ongoing communication between volunteers and staff?

A formal method and schedule for ongoing communication is essential.

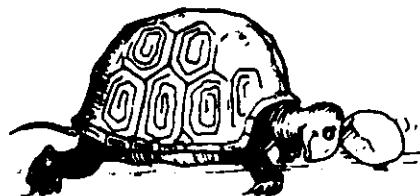
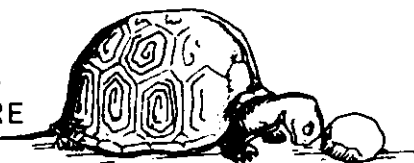
Responsibility for communication is a two-way street. Take the initiative when you feel the need to communicate, and encourage volunteers to do the same.

**BUILDING CONFIDENCE:** There are many common feelings that supervisors and volunteers share as they progress in the volunteer experience. The end result is usually a feeling of confidence that they have developed new skills and made a worthwhile contribution to their community.



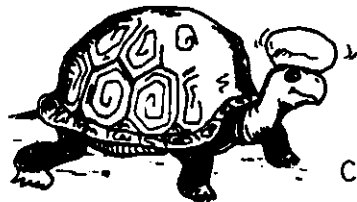
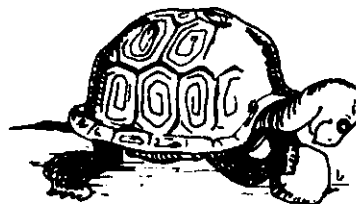
FEELING VERY UNABLE

FEELING AWKWARD,  
BUT GETTING THERE



FEELING MORE ABLE

FEELING SKILLED



CONFIDENCE FEELS GOOD!

-- Keith Egli

## CHECK LIST FOR EFFECTIVE SUPERVISION OF VOLUNTEERS

The following are important steps to successful volunteer supervision.

- \_\_\_\_\_ IDENTIFY NEED.
- \_\_\_\_\_ WRITE JOB DESCRIPTION.
- \_\_\_\_\_ SECURE ADMINISTRATIVE, RECIPIENT, FAMILY SUPPORT.
- \_\_\_\_\_ RECRUIT VOLUNTEERS.
- \_\_\_\_\_ PLAN PRESERVICE CONFERENCE.
- \_\_\_\_\_ SCHEDULE AND HOLD PRESERVICE CONFERENCE
- \_\_\_\_\_ ORIENT AND TRAIN VOLUNTEER.
- \_\_\_\_\_ PROVIDE SYSTEMS FOR DOCUMENTATION OF VOLUNTEER SERVICE/EXPERIENCE.
- \_\_\_\_\_ ASSESS PROGRESS TOWARD GOALS THROUGH ONGOING COMMUNICATION AND EVALUATION.
- \_\_\_\_\_ PROVIDE ONGOING RECOGNITION AND SUPPORT.
- \_\_\_\_\_ PREPARE FOR TRANSITION.
- \_\_\_\_\_ ASSESS NEED FOR CONTINUATION OF VOLUNTEER SERVICES.
- \_\_\_\_\_ PROVIDE VOLUNTEER WITH EXIT INTERVIEW.



**IDENTIFYING YOUR NEEDS:** Volunteers supplement services by relieving staff of detail work, increasing individualized assistance, and providing enrichment opportunities.

To determine how volunteers can help you:

Dream your dreams on paper...

List all of the things you wish you could accomplish for those with whom you work. Choose one idea. Decide if this is something that you could delegate to a volunteer. If yes, you are ready to develop your job description. If not, select some tasks you are currently doing that could be delegated so that you may pursue your new idea. List your ideas here:

---

---

---

---

---

**DEVELOPING A JOB DESCRIPTION** (See pages 17-18 for Volunteer Job Description Form.)

Now that you have dreamed your dreams, refine your thoughts. Begin the process by using the following format:

- Your idea:

Purpose/goals of the volunteer position:

For you \_\_\_\_\_

For community or individual served \_\_\_\_\_

---

For volunteer \_\_\_\_\_

- Volunteer qualifications and qualities needed (includes concepts, traits, skills, philosophies, and educational background if necessary):

---

---

- Job responsibility:

What do you want the volunteer to do? \_\_\_\_\_

\_\_\_\_\_

How do you want the volunteer to do it? \_\_\_\_\_

\_\_\_\_\_

When? \_\_\_\_\_

Where? \_\_\_\_\_

Required time commitment? \_\_\_\_\_

Why? \_\_\_\_\_

How will he/she be accountable to you? \_\_\_\_\_

\_\_\_\_\_

How will he/she be accountable to the agency? \_\_\_\_\_

\_\_\_\_\_

How will he/she be accountable to the recipient of services? \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

- Work schedule: \_\_\_\_\_

- Firm expectations (should reflect absolute requirements of the position):

\_\_\_\_\_

- Flexible expectatons (should reflect negotiable requirements of the position): \_\_\_\_\_

Keep in mind that it is usually advisable to begin on a small scale with the possibility of future expansion after evaluation of the initial project.

How will you measure success or failure? (Individual evaluation is particularly important for direct service. The situation will dictate what form of evaluation will best suit the needs of individuals, programs, or committees.)

---

---



REVIEWING THE JOB DESCRIPTION

Will this service really enhance the program?

Can I justify this need?

How can this service/task be accomplished? Is there more than one way to do it?

How will this service be handled if the volunteer is unable to be there or to follow through?

Will this job description attract a person with the qualities, skills, experience, and background required?

Is there another way to state the request to appeal to persons with different qualities? (You may want to develop several job descriptions to attract different people.)

How will other people you work with be affected by this position? (Whom do you want to prepare and involve in addition to your administrator?)

Is this job description compatible with your professional and/or agency code of ethics?

Based upon your responses to the above questions, refine your job description on the form found on pages 17-18 after you have secured support.

**SECURING SUPPORT:** To assure success in your plan for volunteer assistance, it is imperative to enlist the support of the administrator, involved coworkers, recipients of service, and appropriate members of the family. Recognize that when new ideas are initiated, they are not always readily accepted. It is necessary to keep everyone informed. Realize that your plan may not be a total solution to the expressed need, but may stimulate new thoughts or approaches.

Think about who will approach the recipient and family and how ideas will be presented so they will be clearly understood. Because people have a right to control their own lives, and often find it difficult to accept help from others, respect for each individual's feelings and comfort level is important. Involvement of recipients in the planning process (and their families when appropriate), will help them to play an active role in the service plan.

Think through pros and cons as you develop the job description. Schedule an exploratory meeting with the administrator with the attitude that this idea is being presented for discussion purposes. Listen carefully and adopt appropriate changes. Secure and involve all other necessary support to implement your proposal.

VOLUNTEER JOB DESCRIPTION FORMAT

Your name \_\_\_\_\_ Your position \_\_\_\_\_ Date \_\_\_\_\_

Agency/Organization/School \_\_\_\_\_ Telephone \_\_\_\_\_

Address \_\_\_\_\_ Zip \_\_\_\_\_

Title of volunteer position \_\_\_\_\_

JOB RESPONSIBILITIES:

STEPS NEEDED TO ACCOMPLISH RESPONSIBILITIES:

- |    |                                     |
|----|-------------------------------------|
| 1. | 1. a. _____<br>b. _____<br>c. _____ |
| 2. | 2. a. _____<br>b. _____<br>c. _____ |
| 3. | 3. a. _____<br>b. _____<br>c. _____ |
| 4. | 4. a. _____<br>b. _____<br>c. _____ |
| 5. | 5. a. _____<br>b. _____<br>c. _____ |
| 6. | 6. a. _____<br>b. _____<br>c. _____ |

Where will the volunteer perform this job? \_\_\_\_\_

What will the work schedule be? Day \_\_\_\_\_ Time \_\_\_\_\_

Number of hours weekly? \_\_\_\_\_ monthly? \_\_\_\_\_ other, specify \_\_\_\_\_

Desired qualifications and qualities \_\_\_\_\_

How will the volunteer be accountable to you? (i.e., reporting systems, adherence to criteria for success -- see pages 32, 36-45.)

How will the volunteer be accountable to the recipient of service? (i.e., regular attendance, ongoing feedback)



How will you and the volunteer be accountable to the agency? (i.e., adherence to agency standards, philosophies, policies)

How, when, and what will you communicate with the volunteer? (See section on communication.)

What orientation and training will be required for the volunteer? When will it be held?

What are your expectations for confidentiality regarding this position?

List the people who will be important for the volunteer to know, including their role in the agency and their relationship to the volunteer.

List the expectations that are absolutely necessary for the success of this position:

List the expectations in this volunteer job which may be flexible: \_\_\_\_\_

What criteria will you apply to evaluate success of this project?

Administrative approval \_\_\_\_\_ (signature)

\*It is intended that this form be modified to meet the needs of your program.

**RECRUITING VOLUNTEERS:** Finding a volunteer usually is not an easy task. Sensitivity to the needs of the potential volunteer plus hard work, determination, and persistence will lead to success in recruitment. Remember, volunteers are located one by one. Investments in retaining current volunteers will lessen the need for new recruitment while strengthening the overall program. (See sections on training, communication, evaluation, recognition)

Saturate the community. Advertise in many ways for each position. Following are some ideas:

Church bulletins	Local and city newspapers
Public service announcements (radio, TV)	TV talk shows
Flyers	Posters
Bulletin boards in shopping centers	Speaking engagements
Coffee parties	Word of mouth appeals
One-to-one appeals	Welcome Wagon
Chamber of commerce	(for new residents)
Special interest clubs, organizations, or schools	<b>SATISFIED VOLUNTEERS</b>

Multiple approaches are necessary. Sometimes there is a time lapse of weeks before individuals respond to an appeal. For this reason, it is important to start your recruitment effort well in advance, with ample opportunity for repetition and variety in approach. Timing is important. Keep in mind what times of year people make their commitments.

#### Recruitment Cycles

January	--	Hold informational meetings and distribute literature to attract field students in schools and colleges. Plan and advertise midyear training.
February	--	Continue midyear recruitment.
March	--	Begin recruiting for advisory committees. Plan recognition event if you have not already started. The efforts put toward recognition events, while not directly a recruitment tool, increase visibility, especially if volunteers are encouraged to bring guests. A good time to start recruiting senior citizens.

- April -- Volunteer Recognition Month. Begin gathering and disseminating information for summer volunteers. Distribute spring literature. Continue recruiting senior citizens.
- May -- Hold informational meetings about fall volunteer needs to encourage volunteers to plan ahead. Recruit high school students for summer positions before plans are in place and school is adjourned.
- June -- Early in the month place summer volunteers. Recruit junior volunteers to meet needs.
- July -- Quiet recruitment month. Good time for preplanning.
- August -- Disseminate fall recruitment literature in the latter part of the month. Provide information about volunteer positions and programs.
- September -- Hold informational recruitment meetings. Gear appeals to parents of kindergarten through grade 12, college field students, high school students.
- October -- Continue recruiting field students, junior and senior high school students, and community volunteers. Schedule training sessions for mid-October.
- November -- Continue recruiting field students through first two weeks.
- December -- Quiet recruitment month. Happy holidays!  
(Some agencies have increased needs during holiday seasons.)

There are some additional considerations when planning recruitment efforts. For example, attention must be given to transportation and mobility when recruiting senior citizens. Recruitment is necessary every quarter or semester change if college students needing field experience in education, recreation, or social work are desired.

In addition to advertising needs, maintain the visibility of the program by highlighting volunteer accomplishments and providing basic information about the program and projects through regularly submitted news releases.

**ATTRACTING VOLUNTEERS:** It is time to take another look at the job description. When it was designed the focus was the task to be performed. Now consider what kind of person you hope to attract to this volunteer position. A clearly defined job description and your spirit of enthusiasm for the position will be effective recruitment tools. Depending on the population you are approaching, your recruiting technique will vary. The following are examples of recruitment appeals geared to attract various people.

Information To Emphasize

- |                              |   |
|------------------------------|---|
| 1. Senior citizen            | Friendship opportunities<br>Support<br>Flexibility<br>Benefits (lunch, transportation reimbursement)  |
| 2. Student                   | Documentation of volunteer experience<br>Possible future references<br>Experience   |
| 3. Parent of preschool child | Nonthreatening experience (In situations where the person has not been in the volunteer or the paid work world for a while)<br>Child care<br>Direction<br>Support |
| 4. Professionals             | Recertification opportunity<br>Challenge<br>Appropriate level of responsibility   |



SAMPLE RECRUITMENT APPEALS  
Geared for Different Volunteer Audiences

An English as a Second Language volunteer with previous teaching experience is being sought to reinforce basic skills of persons in cultural transition. This experience is an opportunity to use professional skills and is often applicable for recertification credit. The \_\_\_\_\_ method of instruction is used in this program. People wanting to support new members of the community in this way should contact \_\_\_\_\_ for details.

This description is an attempt to attract professionals who will find recertification to be an appealing benefit. The specific teaching approach is included in order to identify a volunteer with a corresponding philosophy.

---

Community members who enjoy providing friendship to individuals new to our country are needed. These volunteers will assist the professional teaching staff in a classroom setting. They will reinforce academic and life skills on a one-to-one basis. Direction will be provided. Morning hours and child care are available. Interested persons are invited to observe the classroom. To make arrangements, call \_\_\_\_\_.

This description is designed to attract a volunteer with children who cannot volunteer without child care assistance. It is worded in a nonthreatening way so that a person who is not formally trained will know that there will be adequate direction and support and, therefore, will feel more comfortable applying for the position.

SAMPLE RECRUITMENT APPEALS  
Geared for Different Volunteer Audiences

A group of upper elementary students highly interested in photography is looking for a person to help with picture taking and development skills. This volunteer must enjoy working with children and have photography and photo-developing skills. The group will meet one hour per week, Tuesday or Thursday afternoons. Specific hours can be arranged to accommodate the volunteer's work schedule. Supplies and equipment will be provided. A faculty advisor will be available for consultation. To apply for this position call \_\_\_\_\_.

This description can be written as one position. It can also be presented as two positions to appeal to persons who wish to work as a team and who have different strengths or time limitations. In this instance, one volunteer can specialize in photography skills, and the other volunteer can assist in the darkroom.

Notice that the appeal emphasizes "interest in children" as well as photography skills, since the person must have both of these qualifications in order to successfully carry out the assignment.

One idea is to post this ad in photo shops where there are many people who have an interest in photography.

---

Volunteer sales people are needed to promote quality products made by disabled persons living in our community. Tasks include selling, setting up displays, and explaining the program to customers. Volunteers will receive orientation to the program and training in "selling procedures." Experienced volunteer will be available to assist. Schedules are arranged at each volunteer's convenience. Transportation expenses will be reimbursed. People who would enjoy working with others, while encouraging artistic talents of the handicapped, may learn more about this opportunity by calling \_\_\_\_\_.

Notice that in this description the plural (use of the word volunteers rather than volunteer) implies opportunities for interaction with others. This description also emphasizes flexibility in the position, training and support,

and defrayed expenses. It is an attempt to advertise an important position in a nonthreatening manner to appeal, for example, to retired persons who may not have been in the volunteer or paid work world for a while.

---

#### SAMPLE RECRUITMENT APPEALS

##### Geared for Different Volunteer Audiences

A sales intern is being sought to assist with the sale and promotion of quality products made by area residents who are disabled. This volunteer will gain experience in selling, setting up displays, and presenting the program to customers. Orientation will include information about how items were made, where proceeds will go, how to use a cash register, and related business procedures. Community shopping centers will provide booth space. A volunteer assignment of four hours per week will be arranged. Documentation of experience for future employment or academic credit will be provided. To apply for this volunteer position, call \_\_\_\_\_.

Note the use of key words, such as academic or employment credit, which make this job attractive to a student. "Apply" indicates a responsible position and implies that one person will be selected. The idea of experience and documentation which may lead to a reference will be of special interest to many students.

---

**EFFECTIVE COMMUNICATION IS A KEY TO SUCCESS:** This section will focus on crucial times for communication throughout the volunteer experience. These include:

- The initial inquiry or meeting.
- The initial interview (or preservice conference).
- Orientation and training.
- Ongoing communication (day to day).
- Evaluation (usually midyear and/or end of year).
- Exit interview.

Mutual understanding will develop through thoughtful communication of clearly defined expectations of both staff and volunteers.

#### RESPONDING TO THE INITIAL INQUIRY

When a potential volunteer contacts you, it is important to create a warm, welcoming atmosphere where he/she feels appreciated and needed. As you respond to inquiries about volunteer positions, share the following information with additional questions and modifications:

- Available volunteer opportunities.
- Steps to becoming a volunteer in your agency.
- An invitation to observe the program.
- Name and telephone number of the contact persons regarding positions in which they are interested.
- Background information about the program. (You may want to mail a prepared brochure.)
- A description of how volunteers are supervised in your setting.
- Directions to the volunteer site with information about parking.
- Procedure for making an appointment. Note who to contact if the appointment cannot be kept.

#### THE INITIAL INTERVIEW (Preservice conference)

It is beneficial to have the volunteer fill out an application form before the interview and/or preservice conference. This will give the volunteer time to carefully consider areas that are important to an appropriate placement and also help you present options that are compatible with the volunteer's time,



interests, and skills. It should be made clear that the potential volunteer is not obligated by filling out the application form. The application should be viewed as a helpful tool in considering volunteer alternatives, rather than as a commitment to volunteer at the time it is completed.

After reviewing the application form, you are ready to conduct a personal interview. You may not obtain all the information you require and may choose to schedule additional interview time or a preservice conference. First interviews usually take about 30 minutes. Careful thought given to how questions are stated will set the tone for a friendly, nonthreatening, and informative interview.

It is important for you to become aware of the volunteer's strengths, areas of interest, limitations, personal expectations, and long-range goals. This information will help you appropriately place the volunteer while giving him/her the opportunity to build his/her own skills and experiences.

#### WHY INTERVIEW?

- To establish rapport and set the boundaries for the volunteer position.
- To determine the sincere interest of the potential volunteer.
- To help the individual fully understand the job responsibilities and commitments involved should he/she accept the position.
- To gain a sense of particular areas of interest of the volunteer, in order to make an appropriate placement (i.e., preference to work with a particular age group, such as preschool children or senior citizens; or to work with a particular skill area, such as art, secretarial services, or photography).
- To encourage and support an individual who will potentially be a valuable volunteer but who may be initially unsure of his/her own capabilities for the position being explored.
- To gain a preliminary sense of the individual's temperament/nature that may be helpful in selecting the professional staff supervisor to whom the volunteer will be assigned.

- To find out educational, experiential background information that may give a clue about the need for future support and/or inservice training.
- To understand the motivation or long-term goals of the volunteer so that you can be sensitive to his/her needs.
- To demonstrate that the job is important and necessary enough for you to take the time for a personal interview and to show that you are interested in and appreciate the volunteer applicant.

Because of the uniqueness of every program, this material must be adapted to individual program needs.

#### SUCCESSFULL INTERVIEWING

##### Suggestions:

- Help the volunteer feel relaxed and comfortable by being genuinely interested in him/her as an individual.
- Express your appreciation for the volunteer's interest and initiative.
- Spend most of the time listening to the volunteer.
- Indicate your desire to assist in providing a positive volunteer experience. Remember, IT IS ONLY APPROPRIATE TO ASK JOB RELATED QUESTIONS.
- Ask questions which invite the volunteer to share information about skills and hobbies.
- Word your questions so they do not elicit yes or no responses. Example: "Tell me about some of your skills and interests and how you like to spend your free time. This will give me an idea of what kind of volunteer position might interest you."

#### QUESTIONS TO ASK THE VOLUNTEER

- What makes this organization attractive to you?
- To which specific position are you responding? What makes it appealing to you?
- What are your time schedules, talents, and interests that will have a bearing on your placement?
- What age group do you most enjoy? (Elderly, adult, youth, preschool, peer) Describe some of your experiences with this particular age group which would help in determining your placement.)
- Tell me about your work style. (Independent, one-to-one, small groups, large groups)

- Tell me about the kind of experience you prefer -- direct or behind the scenes?
- Do you like to lead or carry-out services? Can you elaborate?
- What level of responsibility do you feel you are capable of, ready for, and able to handle at this time?
- What current personal circumstances or other obligations do you feel may influence the placement you are considering?
- Do you want a long- or short-term commitment? (What kind of commitment will you make and how long do you plan to stay?)
- Do you prefer working with people or do you prefer to work at tasks. How important is this choice to you?
- What do you hope to see accomplished for this program as a result of your volunteering?
- What else do you need to know about our organization in order to make a decision?
- Other questions pertaining to the particular situation.

Effective interviewing is a skill which is strengthened with experience. The nature and direction of the interview will be influenced by the person being interviewed. Be aware that people have differing styles of communication. The interview experience may affect a person's initial reaction. A combination of written and verbal tools will provide you with clues to appropriate placement. You will add depth to your program and the community you are serving by involving people from diverse backgrounds.

The information gleaned from first impressions is sometimes insufficient. It is worth the wait to make determination of placement when you are uncertain. INITIALLY, A GOOD RULE OF THUMB IS TO BE CONSERVATIVE IN ASSIGNING RESPONSIBILITIES. IT IS EASIER TO ADD RESPONSIBILITY THAN TO TAKE IT AWAY. Qualities will surface as you get to know the volunteer. Keep reviewing your placement by asking if you are using all of the potential skills and abilities

of the volunteer. When you or the volunteer are unsure of the appropriate placement, it may be helpful to involve the volunteer in training, provide an opportunity to observe the setting, and/or have him/her begin a placement on a trial basis.

#### REJECTING PLACEMENT

Occasionally, as an interviewer of volunteers, you may find that the person interviewed does not match the requirements of the position for which he/she is applying. Reasons for the mismatch might include philosophical differences, lack of sufficient background or specific skill for the particular position, or other factors making it difficult to complete the volunteer placement.

A decision not to place a volunteer is not a reflection on the applicant as an individual. Almost always, the volunteer has strengths and qualities that will lead to successful contributions in another volunteer position. A positive approach to take is to redirect the volunteer to another volunteer program or clearinghouse for volunteer services.

Point out the volunteer's strengths and qualities. Ask if he/she would be comfortable if you were to contact another program to see what opportunities are available that would better match his/her skills. This method allows the volunteer to leave your office with a positive feeling while remaining within the volunteer community.

The initial interview often leads into a preservice conference when it is determined that the volunteer placement is mutually appealing. Depending on the situation, you may choose to conduct the preservice conference as an extension of the initial interview, or schedule a separate time for this purpose.

## PRESERVICE CONFERENCE

Information to share at a preservice conference:

The preservice conference is an opportunity for you and the volunteer to continue to build rapport, clarify the nature and requirements of the volunteer position, establish goals, and describe support systems. Before discussing the job description, ask the volunteer to further elaborate on the skills he/she has to offer, previous experience, areas of special interest, why he/she wants to volunteer, and what she/he hopes to gain from the experience.

Elements of the preservice conference:

- Show appreciation for the volunteer's interest and skills.
- Read and review the job description (and provide a written copy as appropriate).
- Discuss the firm expectations and the flexible expectations. Firm expectations reflect the absolute requirements of the position, such as training that is essential to accomplish the goals of the volunteer position. You will be able to draw from a wider community if you have more flexibility in your expectations. Therefore, limit firm expectations to a minimum.
- Tour the facility and be sure to include the place for personal belongings, the lunch room, restrooms, coffee room, and any other areas the volunteer will be expected to use in her/his position. As you tour the site, introduce any staff the volunteer may encounter.
- DISCUSS CONFIDENTIALITY AND HOW IT PERTAINS TO THE SPECIFIC VOLUNTEER POSITION. Each person has her/his own interpretation of what is confidential. Therefore, it is important to define your interpretation of confidentiality and discuss the specific types of situations that may arise.



PRESERVICE CONFERENCE PREPARATION FORM  
To be used in conjunction with  
preservice conference material found on previous pages

1. I will create a warm, welcoming atmosphere by: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. My firm expectations of this volunteer: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. My flexible expectations of this volunteer: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

4. My goals for the volunteer position: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. My criteria for assessment of success:

A. Of programs (or progress toward goals of recipient):

B. Of volunteer performance:

C. Of staff supervision:

To learn about the needs and expectations of the volunteer, ask for his/her feelings and reactions. Reiterate your expectations. As a result of your discussion with the volunteer you may incorporate some changes which are appropriate to the goals of the position. Come to a mutual agreement with the volunteer and explain that this agreement will serve as the basis for future communication and evaluation.

**ORIENTATION AND TRAINING:** The purpose of orientation is to provide all volunteers with a similar introduction to the organization, including its philosophy, history, goals, policies, and guidelines. In order for volunteers to perform their tasks effectively, they must know what is expected of them and understand how they help to accomplish the overall goals of the organization.

**ORIENTATION AND TRAINING WILL BE EFFECTIVE ONLY IF THE ORGANIZATION HAS CAREFULLY DEVELOPED A WRITTEN STATEMENT OF ITS GOALS, POLICIES, AND GUIDELINES BEFORE THE FIRST VOLUNTEER IS TRAINED.**

Plan your training according to:

- The nature of the task.
- The duration of the volunteer position.
- The previous experience of the volunteers.
- The level of responsibility of the position.

A thorough introduction to the facility and staff will make the volunteer feel welcome and comfortable. Do not forget to include information about restrooms, telephone policies, smoking/nonsmoking areas, working areas, lunch room, coatroom facilities, and parking.

**TRAINING:**

Structure training to be effective. For example, select a room appropriate to the size of the expected group.

These questions will help you formulate your plans.

- What atmosphere do you want to create? (Formal, informal, businesslike, social)
- What available rooms lend themselves to the desired atmosphere? (i.e., lounge, library, conference room, office)

- Will refreshments be served?
- What special seating or room arrangement will there be? (Is body language important in this situation?)
- How will opportunities for volunteer participation and interaction be provided?
- Are name tags needed?
- How much time will be allowed for questions and comments?

Incorporating a variety of training approaches will strengthen the training experience. The following outline may be helpful when planning training:

Welcome -- introduction of participants and overview of the training plan.

#### Formal presentation

- Use a variety of speakers (panels, guest speakers, professional staff from your agency)
- Use a variety of media
- Plan activities which involve participants

#### Time to process and integrate formal presentation

- Question/answer period
- Sharing of related personal experiences
- Opportunities to verbalize thoughts and feelings
- Review of what has been learned
- Group identification of future training needs or interests
- Participant evaluation of the training experience

#### Closure

Close with an encouraging statement of support. Reassure volunteers of your confidence in their ability to succeed in their new volunteer positions. Ask participants to briefly share their feelings about the training experiences. Reinforce your availability to be of assistance as they commence their volunteering.

## SPECIALIZED TRAINING

Most volunteer positions require specialized training. Volunteers in ongoing positions will always need some form of specific training that corresponds to their job description. Specific job training will include:

- Expectations of the position.
- Opportunities to observe others performing similar tasks.
- Practical experience and background about the nature, responsibilities, and goals of the job.
- Information about resource persons and materials that will provide insight into methodology and philosophy.
- Information about the method of ongoing staff-volunteer communication. (Depending on position, may be written log, verbal conference, notebook file, phone, etc. See pages 35-39.)
- Criteria for measuring progress toward goals of the position (evaluation). See pages 40-45.

During the course of training, supervisors will have an opportunity to:

- Observe volunteers' understanding of their roles.
- Begin to develop a trust level.
- Understand where future in-service will be needed.
- Build volunteer self-confidence by noticing competencies.

Training sessions are opportunities for volunteers to establish rapport with others in the same program.

## ON-SITE TRAINING

- Location of materials
- Clear and detailed directions\*

\*WHEN ASSIGNING A NEW TASK, MONITOR THE TASK CLOSELY. IT IS EASIER TO CHANGE THE FIRST FIVE THAN THE FINISHED 500!



**COMMUNICATIONS:** The purpose of communication is to recognize the efforts of the volunteer, mutually evaluate progress toward goals, and clarify each person's needs and expectations.

Formal and informal communication systems are essential in order to establish unity of purpose and create an environment in which mutual support and understanding can occur. Everyone, including the staff, the volunteer, and the recipient of service must be considered and valued. Learn about and address the needs of each team member. Sharing learning experiences, needs for support, and time management concerns of all team members will lead to a productive and satisfying experience.

In order to reinforce staff and volunteer understanding about how to effectively carry out responsibilities, continuous dialogue is necessary. Ongoing communication as well as periodic evaluation will help you and the volunteer work in a positive way toward the goals of the volunteer position. Understanding the needs and activities of the volunteer will help you as a supervisor to provide leadership for the volunteer experience. Although formal communication may seem time consuming in many instances, it becomes a time-saver when it avoids error or misunderstanding.

You will gain insight about the recipients of service through communication with the volunteer. Your capability to identify volunteer strengths and weaknesses will help you monitor and integrate staff and volunteer plans to best meet the needs of everyone involved. Your communication is an important link between members of the service delivery team. You as a professional will have built in an effective system of accountability through communication.



Routine communication does not have to involve a great deal of time. It can be as simple as a note or a conversation over a cup of coffee. On the other hand, it can be as official as a planned time together with a mutually agreed upon agenda. In some instances a regular, perhaps even daily method of communication is necessary. As a supervisor of a volunteer you are responsible for knowing what the volunteer is doing and monitoring both methods and outcomes of volunteer activities.

Be alert to the volunteer's definition of confidentiality as well as your own. Sometimes the volunteer continues to operate with different assumptions unintentionally. To clarify your views:

- Set the example by modeling positive behavior in your working environment.
- Provide the volunteer with appropriate responses to inquiries about confidential information and reinforce with role playing. For example: a parent sees a volunteer in the grocery store and inquires how things are going. The volunteer might respond "I love working with Joey. I think it's best for you to ask his teacher about his progress." Or "I've enjoyed working with Joey. I've been instructed by the staff to direct any questions to them so that they can be aware of your concerns."
- Involve the volunteer in confidential situations on a gradual basis where you will have an opportunity to observe his/her way of dealing with confidentiality.
- DO NOT HESITATE TO TERMINATE A VOLUNTEER WHO IS UNABLE TO RESPECT YOUR INTERPRETATION OF CONFIDENTIALITY. Be clear about the reason for the termination so the volunteer will learn from this experience.

People have a need to share their feelings. By providing the volunteer with frequent opportunities to discuss his/her questions and feelings regarding the recipient/volunteer relationship or position with you, you will minimize the possibility of inadvertent or inappropriate sharing of information. Developing written and verbal communication systems is a preventive measure that provides

an outlet for volunteers to share questions and feelings and helps to protect confidentiality. The need for one-to-one communication will depend on individual situations and personalities.

People with strong feelings often need more frequent personal contact. Tell the volunteer that you encourage the open expression of feelings about his/her position and relationships with staff and recipients of service. Clarify that this expression is appropriate with supervisors only, unless there is mutual agreement to involve others. Express your own feelings and make open expression a priority. Establishing rapport will enrich the experience for all involved.

There are three main areas of communication that relate to volunteer services. These areas include informal communication, formal ongoing communication, and evaluation. As you plan for a new volunteer position it will be necessary to determine what communication systems will be most effective for the particular situation.

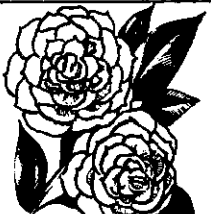
People process information in different ways. It takes time to determine the style that best suits you and the volunteer. For example, some people are more comfortable if they have an opportunity to think about a situation before they discuss it. In this instance, having a mutually established agenda several days before your meeting is important. Other people like to develop ideas through spontaneous discussion. For these volunteers, a specific planned time allocation for free flowing discussion recognizes their need and ability to generate spontaneous ideas.

If there is not time to discuss ideas generated, consider adding the ideas as agenda items in your next meeting. Invite the volunteer to share needs, job-related difficulties, and ideas encountered during the volunteer experience. Your willingness to share your own feelings and experiences will stimulate the volunteer to reciprocate. Written records will be valuable documentation of your communication for future reference.

#### INFORMAL COMMUNICATION

- Over a cup of coffee
- Spontaneous phone calls back and forth
- Periodic short notes back and forth
- Personal greetings
- Short statements about the impact the volunteer has made

(samples)



Johnny came back smiling and said, "I learned two new words playing a fun game." Thanks!

I wanted you to know that!

#### FORMAL ONGOING COMMUNICATION

- Five or 10-minute pre-/post-service conference
- Daily logs
- Request for conference form attached to daily log
- Regularly scheduled meetings (staffings)
- Regularly scheduled phone calls

Sample communication method:

Date	Activity or Task Accomplished	Volunteer Comments	Staff Comments	Future Plans (Staff or Volunteer)

A red flag clipped on the file or form can signal need for conference -- either participant may attach this signal. 38

Sample of completed communication log; (It is important to emphasize nonjudgmental language when completing written reports.)

Date	Task/Activity Completed	*Nonjudgmental Observations or Comments	*Nonjudgmental Staff Comments	Instructions or Plans for Next Meeting
	Mr. Jones and I played cribbage for half an hour. He kept an accurate score. Later he started talking about his family.	He tapped his pencil on the table the whole time he was talking about his family.	<p>Mr. Jones has recently experienced a disappointment in his family.</p> <p>OR</p> <p>Mr. Jones has recently experienced a disappointment in his family. He told me how much he enjoyed your last visit.</p>	<p>He needs to focus on other subjects. Some of his interests are bird watching, travel, and sports.</p> <p>OR</p> <p>It would be helpful to employ active listening skills as per your recent training session. (See attached instructions.) Keep up the good work!</p>

\*Examples of nonjudgmental observations:

"Mr. Jones tapped his pencil on the table" is nonjudgmental.

"Mr. Jones seems nervous" is judgmental.

"Mr. Jones said he was nervous" is nonjudgmental.

## EVALUATION

Evaluation is intended to focus on progress toward initially identified goals for the volunteer position. It is a time to reflect upon the overall experience since the previous evaluation or, for new volunteers, since the preservice conference.

Evaluation is an opportunity to review and assess:

- Progress toward previously identified goals using the criteria for measuring success which was discussed at the initial interview or preservice conference. (See page 31)
- The volunteer's self-assessment of his/her satisfaction with and competency in the volunteer position.
- Overall staff assessment of the strengths and weaknesses of the volunteer's performance.
- Advancement toward personal/professional goals of the volunteer and staff member.
- Compatibility of the staff-volunteer working relationship.
- Volunteer's feeling about how the staff supervisor can help the volunteer carry out responsibilities more effectively.
- Positive aspects of volunteer and staff performance.

Ways to create an atmosphere where mutual trust and honesty can occur:

- You may want to have coffee and a roll with your volunteer, or if you choose, have lunch together.
- Select a comfortable room which is private and free from distractions that could interfere with your discussion.
- Begin the meeting by mentioning ways in which the volunteer has made valuable contributions. Positive statements can be made about everyone. Open and close the meeting with sincere, positive statements.
- Assure the volunteer that you want the conference experience to be one in which there is mutual honesty and trust. This will be an easier task if your previous communication has been clear and honest. However, it is never too late to start. Emphasize that every situation can be made even better. It is necessary to look at both strengths and weaknesses in order to improve the quality of the experience for everyone involved. Encourage the volunteer to reflect in a candid way about his/her experience, including what you as a staff supervisor can do to assist the volunteer in the future.



- Keep in mind that people communicate in many ways. Facial expression, eye contact, tone of voice, and other body language all relay messages. Work at consistency between verbal and nonverbal messages that are given during the course of the conference.

Strive for openness and mutuality during evaluation. People come to situations with their own personal expectations, perceptions, and attitudes. For this reason, it is especially important to consciously structure the evaluation experience in such a way that each person has an opportunity to freely express his/her ideas and feelings.

Mutuality means recognition of each person and his/her insight, which will be of benefit during the communication and subsequent decision-making process. Part of mutuality is carefully listening to and considering what the other person expresses. When volunteers and staff work together to fully use their talents, abilities, and ideas, the organization or program will be enriched.

While the supervisor retains the decision-making authority, he/she will have an opportunity to consider and to incorporate, when appropriate, the information acquired from the volunteer.

Mutually open dialogue is part of the continuous process of evaluation. The following elements create an environment which encourages open dialogue.

- Regular meeting times for specified lengths of time.
- Adherence to meeting time limits for time management purposes.
- Mutually established agendas. You may want to keep a running list to which all parties may add. These items should be listed by priority before beginning the meeting. Advance notice of agenda items will allow for preconference thought and preparation.

- Reiteration of the desire for a team approach during the dialogue.
- Clarification and respect for each person's point of view throughout discussions.

As a supervisor you are ultimately responsible for the planning and direction of the activities with which the volunteer assists. Because of your assigned role in the program/organization, you may find it necessary to modify and in some cases overrule the suggestions of a volunteer. Often, because of your receptivity to new views, you will incorporate a volunteer's valid contribution to the benefit of your organization/program.

#### PRE-EVALUATION SUGGESTIONS

- Set an appointment a week or two in advance of the conference.
- Let the volunteer know the format for the evaluation session. Set the volunteer at ease by expressing your feeling that this is a time for learning together.
- Distribute forms ahead of the conference. Each person should give thought to the evaluation questions so there can be an effective, honest discussion at the designated time.

#### SELF-ASSESSMENT FOR STAFF SUPERVISORS

Consider the tone you want to set when preparing for an evaluation. Some people are more comfortable dealing with the evaluation process from a purely objective level. Others, however, may find it helpful to mutually address feelings in relation to the volunteer position.

To establish the tone you want to achieve, consider: 1) your comfort level in dealing with feelings; 2) your perception of the volunteer's comfort level in dealing with feelings. If you decide that discussion of feelings, as well as objective assessment of task performance is appropriate, self-evaluation will

allow you to identify your feelings. This will facilitate a more fruitful and productive formal evaluation when you and the volunteer meet together. Focus especially on uncomfortable feelings, because they will give you clues to areas where improved communication and personal growth may be helpful.

Ask yourself these questions:

- what feelings do I have when I think about my experiences with this volunteer?

relaxed	threatened	frustrated	embarrassed
tense	stimulated	enthusiastic	perplexed
comfortable	helped	more efficient	enabled
capable	puzzled	upset	inferior
supported	encouraged	superior	happy
more effective	concerned		
others _____	_____	_____	_____

- To what do I attribute these feelings? Identify specific situations which evoke these feelings. Examine possible reasons.
- Were the directions that I gave clear?
- Did I communicate frequently and clearly with the volunteer?
- Did I provide adequate training, supervision, materials, and support so the volunteer could successfully complete the assigned tasks?
- Could these feelings relate to any previous patterns of relationships with persons of similar temperament?
- What can I do in the future to strengthen the quality of volunteer service?

#### SELF-ASSESSMENT FOR THE VOLUNTEER

- Have I been clear about my needs and expectations for training, communication, and evaluation?
- Have I been honest about my time availability?
- Do I feel that I am adequately fulfilling the requirements of the position? If no, identify areas of uncertainty and how improvements might be made.
- What feelings do I have about my volunteer experience that would be helpful to share with my supervisor?

If you choose to share information you discovered during self-assessment, here are some suggested ground rules:

- Deal with the situation and not the personality.

- Keep the focus specifically job related.
- Weigh your comfort level when discussing your positive or negative feelings.
- Work toward being open to hearing the answers if you are willing to ask the questions.
- Try to reserve the right to delay your response and allow time to integrate information you acquire.

#### DEALING WITH DIFFICULT SITUATIONS

When a difficult situation arises, decide whether or not it could be worthwhile to the program and/or recipient of services to work through the problem. Ask yourself the following questions and take the actions that best fit your professional judgment. A fair way to deal with difficult situations is to be honest and respectful of each individual involved.

Do you believe that it is possible for you and/or the volunteer to make necessary changes in order to satisfactorily address the concern/s at hand? If your answer is yes, consider the following steps:

- Review with the volunteer what has taken place in a sensitive and factual manner. Tie this discussion as much as possible to the original job description, goals, and objectives, orientation, training, and criteria for success for the position. (See pages 17-18, 31-34)
- Describe the impact the situation has had on the organization/recipient of services in a nonblameful way. Point out how these facts and circumstances require a mutually agreed upon plan which will rectify the situation.
- Allow the volunteer time to express his/her account of events, views, and feelings.
- Accept your share of responsibility for the situation.
- Point out strengths you have noticed in the volunteer's performance.
- Devise a plan of action which will facilitate necessary change.
- Establish a date for re-evaluating the situation including progress toward goals.

Is the situation serious enough to justify terminating the volunteer from this position? If your answer is yes, pursue this course. In some instances it may be appropriate to inform your own supervisor of your intended actions prior to proceeding.

- Review with the volunteer what has taken place in a sensitive and factual manner. Tie this discussion as much as possible to the original job description, goals and objectives, orientation, training, and criteria for success for the position. (See pages 17-18, 31-34)
- Explain in detail what steps were taken to prevent or rectify the situation.
- Describe the impact the situation has had on the organization /recipient of services in a nonblameful way. Point out how these facts and circumstances necessitate that the volunteer not continue in this particular volunteer position.

...then

- Allow the volunteer to express his/her accounts of events, views, and feelings.
- Accept your share of responsibility for the situation.
- Point out strengths you have noticed in the volunteer's performance.
- If you feel the volunteer is receptive, tell the volunteer about specific types of volunteer positions which might be suited to his/her skills, interests, and time. Refer him/her to another position within your organization or inform him/her about opportunities available through other programs or clearinghouses for volunteer services.
- Thank the volunteer for being a volunteer.

## DOCUMENTATION

Why is it important to document volunteer experience?

It is hard to predict when a record of volunteer experience will be important. Accurate record keeping may seem bothersome or unimportant, but there is often a need to retrieve this information.

Documentation is important to the volunteer:

- For tax deduction information. (Check with IRS or a tax consultant. Important records to keep are mileage and out-of-pocket expenses.)



- For future school or employment reference purposes. Training, service hours, and evaluation provide relevant information when writing resumes.

Documentation is important to you as a supervisor of volunteers:

- For monitoring volunteer performance.
- For measuring progress toward goals.
- For assessing readiness of volunteers to move into new levels of responsibilities.
- For statistical documentation of volunteer service which may influence fund raising/fund maintenance efforts.

Your personal commitment and attitudes about documentation will be transmitted to the volunteer. Ask yourself these questions:

- How committed am I to documentation?
- Do I believe volunteer experience will be thoughtfully considered by an employer?
- Do I see documentation as an opportunity to thank the volunteer for a job well done?
- Do I believe that by helping to meet the needs of volunteers I am strengthening the quality of services volunteers provide?

If you have answered yes, you are ready to encourage your volunteers to document for their known or unknown future needs.

Volunteers are frequently unaware of the skills they are using and developing as they perform their jobs. You will boost volunteer self-esteem by noticing accomplishments and providing a personal folder incorporating the following items:

- Job description (pages 17-18)
- Verification of training
- Service hour forms
- Evaluations
- Certificates of recognition
- Thank you notes
- News clippings
- Exit letters and other pertinent information

Volunteers need encouragement to establish the habit of record keeping. By introducing this simple system you will start volunteers on a positive path to documentation which they can utilize in other situations.

A WORD OF CAUTION:

Know your data privacy laws. These laws may vary from state to state.

Usually, many of the same laws that apply to employees are applicable to volunteers. File information should be accessible to volunteers upon request. Do not release file information without advance permission in writing from the volunteer.

**RECOGNITION:** Every person wants to know that what he/she is doing is valued and important. While large recognition events are often appropriate and necessary, ongoing recognition is sustaining, encouraging, and motivating. A simple smile and "good morning -- nice to see you today" recognizes the presence of the volunteer and offers a welcoming atmosphere.

Because of the nature of many volunteer positions, volunteers frequently find it difficult to assess the value of their work. Noticing changes that occur as a result of volunteer efforts helps volunteers to realize their importance.

General statements like, "I'm so glad you're here," are a good first step but statements noting specific results have even more impact. The following statements are short, simple, specific affirmations that will help the volunteer feel recognized and valued:

"It's so much easier to find things in the art room since you've been here organizing for us."

"Our accounts are in much better order since you have been volunteering."

"Because of your help with labeling and stuffing, we've reached so many people and are seeing an increase in response."

"Johnny said he could hardly wait to meet with you this morning. He even participates more in class since you've been spending time with him."

Involving the volunteer in appropriate planning and problem solving makes him/her an integral part of the team. Soliciting ideas and incorporating appropriate suggestions help the volunteer to realize that his/her input makes a difference. Another way to recognize the volunteer is to provide opportunities for growth. Show him/her new ways to carry out responsibilities. Invite him/her to participate in workshops, seminars, and other in-service programs. When appropriate, discuss possibilities for advancement with him/her. Recognizing the volunteer will allow him/her to develop his/her potential, and by so doing, will enrich your program.

A few words about recognition events:

Recognition events are most meaningful when volunteers are made to feel they have made a significant contribution. A few brief, genuine words of appreciation add warmth and dimension. Even the most elaborate festivities without the warmth of words and personal contact can leave the volunteer feeling unrecognized.

Structure the event so that the volunteer does not have to attend alone.

Because some of the volunteer's closest contact and shared experience has been with his/her immediate supervisor, the volunteer feels particularly delighted when invited to attend the recognition event with the supervisor. This is a natural time for supervisors to express their positive feelings about the volunteer and the services he/she provides.

Be sure to include some key people who would be recognized as leaders, or officials whose presence will lend support and encouragement to volunteers. It is also meaningful to include expressions from the people who have directly received services. A thank you note, decorations, pictures, or favors made by recipients of services, or Polaroid snapshots of the volunteer at work all contribute to the sincerity of the event.

**MOVING ON:** The day will come when every volunteer will need to move on, whether it be due to a new volunteer position, a change of interest, or an actual move away. You can support the volunteer by graciously accepting his/her need for a change and expressing appreciation for past contributions.

Because the separation process can be difficult, especially for recipients of volunteer service, advance planning is helpful. Advance planning really begins the day the volunteer starts volunteering. Encourage the volunteer to help recipients of service understand the volunteer's commitment when he/she starts. Ask him/her to say something like: "Hello \_\_\_\_\_, I'm Mary Brown and I will be helping you with \_\_\_\_\_ for the rest of the school year," OR "I will be visiting you on Wednesdays. I'm not sure exactly how many weeks I will be coming, but I'm sure the time we share will be very special to us both."

Prepare the volunteer in advance for the time when he/she will move on. Ask the volunteer to notify the staff as soon as he/she knows it will be necessary to leave. Remind him/her to also prepare the recipient of service by telling him/her when the volunteer's last day will be. Encourage a gradual transition in the relationship and be available to provide additional support to the recipient of services during the transitional process.

#### PROVIDE AN EXIT INTERVIEW

It is important for the volunteer to be aware of his/her accomplishments and skills. An exit evaluation with the volunteer will provide him/her with valuable information about his/her strengths and areas where he/she may wish to improve. Your honesty and support will help the volunteer in establishing future goals and plans.



This is an opportunity for you to learn from the experiences of the volunteer. Ask about his/her perceptions of the volunteer position. What needs to be done differently in the future to strengthen the experience for everyone involved. During this transition period you may want to re-examine the position job description and redefine roles and responsibilities where appropriate to your revised goals and expectations.

**EPILOGUE:** Congratulations! You have begun the process of making a commitment to responsible volunteer supervision. You have been introduced to the cycle of staff-volunteer relationships and have the necessary tools for success -- the rest is up to you!

**ABOUT THE AUTHORS:** Paula Beugen earned her B.A. in child psychology and social welfare (social work) at the University of Minnesota. She was facilitator of District 281's Community Education and Services program, VOLUNTEERS IN ACTION, a local clearinghouse for school and community volunteers from 1975 to 1983. She is a former member of the Advisory Committee of the Governor's Office on Volunteer Services (currently known as the Minnesota Office of Volunteer Services) and is an active member of the Minnesota Association of Volunteer Directors. Her other activities include: District 281 Bucket Brigade support coordinator, District 281 Minority Concerns Committee, Golden Valley Senior Citizens Advisory Committee, and other community and political organizational activities. She was a recipient of the Jefferson Award for outstanding public service to the local community in 1978.

Mary Robinson earned her B.S. in nursing at the University of Minnesota. She is a past member and co-chairperson of the VOLUNTEERS IN ACTION advisory committee. She is the past unpaid coordinator of volunteer services at St. Margaret Mary School. She is currently a church volunteer leader.

Dawn Wanous earned her B.S. and M.A. in education from the University of Minnesota. Her interest in schools and volunteerism led her from organizing volunteer services in her local school to coordinating the District 281 program of the Bucket Brigade (a volunteer skill-reinforcement program for elementary school children). She also served as a member of the Metropolitan Bucket Brigade Steering Committee and Speakers Bureau. Her other volunteer activities have included Sunday school teaching, political participation, and direct service as a volunteer helping foreign students to learn English. She is a current member of the advisory committee of VOLUNTEERS IN ACTION and past co-chairperson, and has served on various school district committees.