TRAINING THE VOLUNTEER CO-ORDINATOR

A COURSE HANDBOOK

for the
Volunteer Bureau of Greater Vancouver

PREFACE

Following a series of surveys concerning the needs of volunteers and volunteer groups in a large metropolitan area, the Volunteer Bureau of Greater Vancouver discovered a general deficiency or lack of administrative knowledge on the part of volunteer coordinators and administrators of volunteer programmes. This phenomenon is a common one, especially in professional or paraprofessional fields such as social work, nursing, education, and others where capable professionally trained people are advanced or placed in administrative positions. In order to overcome the deficiency, the Volunteer Bureau of Greater Vancouver joined with the Faculty of Commerce and Business Administration of the University of British Columbia in developing a training or educational programme for volunteer coordinators. The course was designed to provide a practical introduction to administrative topics, essential to administrators of volunteers and voluntary agencies.

Much of the material developed for this volume was used in the administrative training course and was evaluated by the participants with regard to relevance and practical application in voluntary settings. The materials in this volume should be of interest to volunteer coordinators or others in administrative or supervisory capacity in an agency using volunteers and they are designed to provide those individuals with the tools and techniques of administration which are required to perform administrative work in an effective manner. Moreover, the materials would prove helpful to those interested in developing a training course in volunteer administration for coordinators of programs, directors of volunteer centers and other administrators of volunteer groups and agencies.

Throughout, an attempt has been made to offer coordinators techniques and skills which they can apply on their own. In order to accomplish this goal an attempt has been made to select materials with ideas and concepts that can be easily transferred into use in a social service agency.

An outline of a suggested training course is included in order that users might have some insight into the design of a typical program. This course was developed under a grant from the Canada Secretary of State, Citizenship Branch, Ottawa to the Volunteer Bureau of Greater Vancouver.

Concurrent with the publication of this handbook, a Book of Readings will be available containing articles relevant to the topics covered by this handbook. Selections from this Book of Readings are included in the Core Readings and Supplementary Readings listed in this handbook for each topic.

INTRODUCTION

In recent years, ther has been an increase in the utilization of the services of volunteers in Canada's social service agencies. This in turn has led to an upsurge in the demand for skilled individuals to coordinate the volunteer programs.

Traditionally, the volunteer coordinator has emerged from the professions, being highly trained in nursing, education, social work, or the social sciences, suddenly finding himself/herself responsible for mainly administrative functions for which he/she is basically unprepared.

With the above knowledge and little more, a group of senior business students under the direction of Dr. Larry Moore and commissioned by Mrs. J. Coinner, Director of the Volunteer Bureau, undertook the development of an educational program for volunteer coordinators.

Training needs were assessed by interviewing volunteer coordinators and through content analysis of comment sheets gathered at a working conference on volunteerism. The study revealed that two major areas existed where some improvement was either desired or required. Most coordinators appeared to be lacking proficiency in administrative skills such as the recruitment, selection, training of volunteers, report preparation, and budgeting procedures. At the same time an interest was expressed in the need to upgrade 'people' skills like motivation, leadership and communications. On the basis of the results a night course consisting of twelve two hour sessions was developed.

With the initial preparation completed, the problem became one of finding a way to offer the course to coordinators in the Greater Vancouver area. Community Education Services, a division of the Vancouver School Board was approached and an agreement was reached whereby the Volunteer Bureau could offer the course under the auspices of the C.E.S. Space was provided at one of the campuses of Vancouver Community College along with free use of xeroxing facilities and audio visual equipment. A stipend was also made available to attract a course coordinator.

A coordinator or director was appointed who took responsibility for the planning and implementation of the program on a weekly basis. This individual acted as a liaison with night school officials, funding agencies, and speakers or teachers lecturing in the program. Also, he or she provided background, written material on each of the topics, arranged any out-of-class assignments, and evaluated the program.

As the program was experimental, it was felt that some control should be kept over the number registering and the type of participant. The reasoning being that to evaluate the effectiveness of such a course, the participants should represent a cross section of both individual backgrounds and agency affiliations. Eighteen individuals were selected from the applicants and the sessions commenced in September, 1973.

All instructors gave of the time voluntarily and were solicited from both the academic and the business community. Each topic was presented by a different person who was considered an 'expert' in the area.

Once again senior commerce students from the University of British Columbia became involved. One group of students was responsible for evaluating the course itself while the other was responsible for the selection, distribution, and evaluation of reading and handout materials used in the training program. Each group handed out its own questionnaire at each session soliciting the opinions and suggestions of the participants.

Before the publishing of this handbook, the course was offered for a second and third time commencing in September, 1974 and September, 1975 respectively; on the basis of this experience, further refinements were made to the content of the material presented here.

This handbook is the compilation of information from the above-mentioned sources over a two-year period. We hope that it will aid you in either conducting or developing a program for volunteer co-ordinators. It must be emphasized from the outset that a course of this type can only provide an introduction to administrative skills required by the volunteer coordinator. A great deal of the learning process is dependent upon the interaction of the class participants. Their sharing of experiences and techniques along with the guidance of an "expert" instructor will facilitate more learning than any straight lecture situation.

The material is presented in two major parts. In Part I, the Proposed Format for a Training Program, each chapter presents an outline of the areas to be covered during a session or sessions, an explanation of why the area was included, a list of reading materials, copies of handout materials and any relevant comments arising from evaluation. Part II is a compilation of 20 exercises and incidents which can be used either in conjunction with the sessions in Part I as part of the overall format for the course, or they may be used individually as a portion of training sessions designed for specific needs.

We would like to thank all those people who helped us get this far in our attempt to upgrade the caliber of Canadian volunteer programs. A special thank you to Jackie Coinner for her role in the development of our training program.

Good luck with <u>your</u> Volunteer Co-ordinators' course!

John Anderson
Larry Moore
Pat Ross

PART I

PROPOSED FORMAT FOR A TRAINING PROGRAM

RECOMMENDATIONS REGARDING CLASS COMPOSITION AND PRE-ADVERTISING

Class Composition

In designing a course such as this, there should be a limit set on the maximum size of the class, in order to facilitate group discussions and obtain participation by all class members in the sessions. The maximum number recommended is 20 participants. In addition, criteria should be established regarding the level of experience and expertise required of participants; this is necessary to attempt to provide some common background knowledge and thus reduce the disparity between participants' needs.

Pre-Advertising

In regard to advertising for the course, adequate and early announcements should be made and widely publicized well in advance of the course. These announcements should include a thorough description of topics to be covered, format of the course and tentative speakers so that potential participants can make a decision regarding whether or not to attend, based on adequate information.

Joyce Howarth
Sue Secord
Dr W.W. Cross.
Volunteer Services

THE PRINTING OF THIS MANUAL WAS MADE POSSIBLE
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We would like to express our appreciation to Dr. Larry Moore for his ideas, energy and enthusiasm and to the many volunteer trainers who have made the co-ordinators' courses and this manual a reality.

Thanks also to our volunteer typists and collators and to our colleague Yolande Cools-Lartigue who assisted greatly with the final draft.

Mrs. Florence Walker
Chairman
Volunteer Bureau of Greater Vancouver

CHAPTER 1: AN OVERVIEW

The first week of the course is essentially a registration process, an opportunity for participants and the coordinator to become acquainted with each other and a discussion of the proposed format of the course. We have discovered that it is extremely important that the expectations of all parties be stated and discussed and that the basic assumptions from which the course was developed be tested. Therefore, the course coordinator must clearly state the objectives and goals which he expects to achieve during the twelve week period. In turn, the participants must state what they expect to learn from the course. Finally, some mutually agreed upon objectives should be formulated.

A set amount of time should be included to discuss the proposed format of the course and provide participants with an opportunity for additions and deletions to the topic areas in order to meet their expressed needs.

Assumptions should be tested. There was much discussion on such areas as:

a) Can industrial techniques be directly applied to the voluntary sector?
b) How much time can be expected of coordinators working full time in terms of reading and assignments?
c) Should the course emphasize content or process learning?
d) How should the course and the participants be evaluated or is this necessary?

It is crucial that potential problem areas be at least identified and hopefully solved during the first night so as to avoid timely disruptions later on. The above topics are only a few examples from our experience; many and diverse subjects may arise during your opening meeting.

In order to prepare the participants for the commencement of the training program the following articles should be distributed one week prior to registration. These articles were chosen to give the volunteer coordinators a broad overview of the volunteer, the volunteer bureau, and the volunteer coordinator.

READINGS

Core Readings

*1. Dering, B., Management of Volunteer Programs, Olympia, Washington: Washington State Office of Volunteer Programs, 1972.

Supplementary Readings

1. Schindler-Rainmah, E., "Are Volunteers Here to Stay?", Mental Hygiene, 1971, 55(4), P. 511+.

*2. Smith, D.H., "Types of Volunteers and Voluntarism", Volunteer Administration, 1972, 6(3), p. 3-10.

*3. Langley, M., "Volunteer Bureaus and the Volunteer as an Advocate", Volunteer Administration, 1972, 6(2), p. 12-21.

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* Indicates that article is included in Book of Readings produced and published in conjunction with this handbook.

HANDOUT

1. Volunteer Bureaus: A Link Between Needs and People

RELEVANT EXERCISES FROM PART II

Exercise 10

VOLUNTEER BUREAUS

A Link Between Needs and People

Volunteering - giving freely of oneself out of a concern and a belief that we all share the responsibility for others in our community, is essential to a society which desires to remain dynamic and free. A hallmark of our democratic system is the desire of citizens to help their fellowman and thereby not only help those in need but also satisfy certain human needs through helping others voluntarily.

Volunteers are people of conviction. They show up in many places, under many names. They work for the government, public and private agencies, groups, associations and other organizations. Working for the federal government they may be called dollar-a-year men; for state and local governments they may be members of a board of trustees, advisory commission or committee. In public and voluntary agencies they may serve in anything from the traditional role of chairman of the board to postage stamp licker to grey lady, candy striper, United Fund campaign worker, Big Brother or scout leader.

Basically, the volunteer is John Q. Public, the person who raises the money, determines the policies, pays taxes and has the final vote. The volunteer of today is no longer that Lady Bountiful who visited the poor. As a matter of fact, it is no longer just a she. Volunteers come from all walks of life, are all ages and all ethnic and racial groups, some with education and skills and some without. They help people directly in staff-volunteer teams or as advocates for change within the community. They tackle such problems as education, mental illness, traffic safety, urban decay, crime, delinquency, drug abuse and family deterioration.

Historically, as the use of volunteers was extended, and their value realized, it became apparent that due to a lack of coordination and communication the talents of all citizens were not being brought to bear on the problems of the community.

The same people were used over and over. Equal opportunity for volunteering did not exist. A clearing house was needed, and the first volunteer bureaus were founded. The purpose, then of the bureaus was to accept requests for volunteers from the health and welfare agencies and to find volunteers to fill those jobs.

The questions are often asked if volunteer bureaus are all that they might be, if, perhaps, they have outlived their usefulness and if they should continue to receive support? My feeling is, that if a community's volunteer bureau is operating today the same as it did five, ten or fifteen years ago, it needs to be challenged, revitalized, rediscovered or reborn. Today, volunteer bureaus are opening their doors to the winds of change as they gear up to meet community needs.

How are volunteer bureaus effectively implementing the services and planning efforts promoted and supported by local United Funds and Councils? The volunteer bureaus are an increasingly important link in a network of local services and a significant part of community planning for social welfare.

Since the organization of the first volunteer bureau in Boston 45 years ago, they have been established in most of the major cities of the United States and Canada. They were created to bring unity to a larger-scale use of volunteers in civic, education, health and welfare organizations. Experience has proven that bureaus are effective both in securing adequate volunteer leadership and in improving the quality to the services performed. Private citizens have been motivated to found over 1,970 bureaus in the United States and Canada. Each of these bureaus came into being through the interest and action of local people who saw a need for coordination, refinement of service and expansion of volunteerism in their community.

Approximately 75 percent of these bureaus receive gradations of support from local United Funds and Councils. Others receive funding through a variety of sources including OEO, Model Cities, Junior League, private funds, individuals, state and municipal sources. There is no reason why budgets for bureaus should not compare favorably with other community agencies. In actuality, they are considered to be in the lowest hierarchy of allocation budgets for human services in a community. Now that there is an awareness that volunteer bureaus are an important service in the consumer revolution, and volunteers can mean allies and constituents rather than adversaries within the system, a new look is being cast toward bureaus. Volunteers see community gaps and un-met needs first hand and help correct them. Social action can result from awareness and from involvement; informed and involved volunteers are better United Fund supporters, better contributors and better campaigners. Without the active interest, participation and leadership of volunteers, there is no single campaign or agency anywhere in the country which would exist for 30 days.

Through the encouragement of the United Way, Volunteer Bureaus developed the Association of Volunteer Bureaus of America in 1951 to coordinate their interests and to facilitate the exchange of information among bureaus. One of the major activities of the Association is its evaluation of local bureaus after one year of operation for possible accreditation with the national association. Standards and criteria for operation have been drawn up by the Association stressing broad community involvement, staff training and meaningful, efficient and innovative use of volunteers. Staffing, as well as loan material and the publication of the annual workshop proceedings, is provided to the Association of Volunteer Bureaus by the United Way of America.

Over the past 20 years volunteer bureaus have been expanding their original function of referral and coordination to their present role of catalyst, consultant, innovator and planner. In these days when communications have become an increasing problem, bureaus are acting as a link between agency, volunteer, community and the public and private sectory. Through consultation with agencies the bureaus provide guidance in the training, supervision and recognition of volunteers. They also lend their expertise to the strengthening of existing programs and develop criteria for the maintenance and establishment of volunteer standards. Through contacts with individuals and community groups, the bureau recruits, interviews and places volunteers with public and private agencies and institutions prepared to make meaningful use of their talents. They also assist private and public agencies in developing their own volunteer programs by supplying guidelines and up-to-date research on community needs.

But volunteerism in changing rapidly. Today most individuals are only interested in service that has positive tangible value to the community. Many volunteer bureaus are recognizing and availing themselves of this fresh climate for positive action. They are seeking new and equal opportunities for volunteerism, emphasizing the general principles of broad community representation and the flexibility that will allow for growth commensurate with community change.

Volunteer bureaus have come far since their beginning as clearing houses for volunteers. They now are established as an integral part of social planning. Most bureaus find more and more of their time taken up with community planning and action rather than recruiting. Staff time goes into working with agencies on innovative or current volunteer programs, on standards for volunteer programs and with groups on their effective participation in a community affair.

Volunteer Bureaus are, and always will be, needed in all the fields of human service and with all age groups from infants to senior citizens. Are you acquainted with your volunteer bureau? Go discover it or help it to discover itself.

CHAPTER 2: THE SELECTION PROCESS

A large portion of the volunteer co-ordinators time is involved in the selection process - job analysis, recruitment, interviewing, selection and placement. Week 2 provides a general overview of the entire process and deals specifically with recruitment and job analysis while week 3 is an extensive examination of the selection interview.

Week 2 - The Selection Process (Part I)

Topic 1 - An Overview

- What are the steps in the selection process?
- When is each step used?
- What is the importance of each step?
- What is manpower planning?

Topic 2 - Job Analysis and Job Descriptions

- What are the objectives of a job analysis program?
- What are the duties of the volunteers?
- What is a job description for - are they needed for volunteer positions?
- How does one write a job description?

Topic 3 - The Recruiting Process

- How many volunteers will be required?
- What will their duties be (from job descriptions)?
- When will their services be needed?
- What qualifications are needed, if any?
- How will volunteers be recruited
    a) by present volunteers
    b) volunteer bureau
    c) other methods (friends, church groups, media campaign etc.)

RESOURCE PERSON

Should be an individual skilled in recruiting at a professional or volunteer level who must be able to relate theory with practical examples from the volunteer agencies. Possibly a team of a volunteer bureau director and a businessman or professor.

READINGS

Core Readings

*1. Larkin, K.L., "Agencies Are Responsible Too", Adult Leadership, 1954, 3, p. 20-21+.

2. Pell, Arthur, Recruiting, Training and Motivating Volunteer Workers, Pilot Industries, N.Y., 1972, p. 11-18.

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* included in Book of Readings

Supplementary Readings

1. Wilstrom, W., "Charting Management Manpower Plans", Management Record, July-August 1961, p. 8-14.

2. Famularo, Joseph J., Organization Planning Manual, American Management Association, 1971, p. 143-153 (Position Descriptions).

HANDOUTS

1. Objectives of a Job Analysis Program
2. Job Description Instruction Sheet
3. Job Specification
4. Means and Sources for Recruiting Volunteers
5. Methods of Recruiting Volunteers

RELEVANT EXERCISES FROM PART II

Exercise 9 (Job Descriptions)
Exercise 19 (Recruitment)

PROGRESSIVE VOLUNTEER BUREAU

1. Objectives of a Job Analysis Program

   1. To determine the selection requirements for the job, for use in recruiting and placing of employees.
   2. To determine the training requirements necessary for efficient job performance.
   3. To furnish supervisors with standardized job content descriptions as an aid to supervision and leadership.
   4. To aid in establishing clearly the duties and responsibilities for the job.
   5. To provide a basic foundation for methods analysis and work simplification when this is deemed necessary.
   6. To provide job facts to aid in establishing and improving safety conditions and health standards.

2. Job Description Instruction Sheet

Brief Job Summary:

1. Write a short sentence describing the work accomplished by your job.
2. Describe briefly the process you go through (lift pieces, operate switches, etc.) in performing the job.

Detailed description of duties:

1. What duties do you perform in the course of the operation? (Tell from where you receive the work, what you do with it, and where you send it.)
2. What duties do you perform only at irregular intervals? (List jobs performed once or twice daily, such as setups and jobs performed weekly or periodically, such as machine maintenance).
3. To whom are you directly responsible?
4. What materials are used?
5. What machines and special equipment are used?

Performance requirements:

1. In your opinion, what is the lowest grade of grammar school or high school that should be required to learn to perform this job?
2. What past experience is necessary for a new employee to have in order to perform the job?
3. How long will it take an inexperienced new employee to learn this job?
4. In what other positions in the company could an employee receive training for your position?
5. What, in your opinion, is the most difficult part of your work and why is it difficult?

Working conditions:

1. What are your usual working hours?
2. What are the disagreeable features of your work?
3. What percentage of your time is spent in operating the machine (exclusive of setups, loading, and unloading)?

Other comments you feel may be useful:

Job Description

Job Title ______________________ Department ______________

Section ______________________ Date ______________

Brief Job Summary:

Detailed description of duties:

Performance requirements:

Working Conditions:

Other Comments:

Your name ______________________ Years in this position ______________

Supervisor ______________________

3. Job Specification

Job Title ______________________ Date __________

Department ______________________ Section __________

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Job Summary:

Job Requirements

1. Age: minimum/maximum age requirements ______________

2. Education:

   a) minimum educational requirements ______________
   b) specific other courses required ______________

3. Experience required: ______________

   ____

   ____

4. Knowledge and skills: ______________

   ____

   ____

5. Physical Requirements: ______________

   ____

6. Sex: __________ 7. References required: __________

8. Worker must furnish: ______________

9. Shift: __________ Hours: __________ Days per week: ____

10. Minimum test scores: ______________

    ____

    ____

11. Additional requirements: ______________

    ____

MEANS AND SOURCES FOR RECRUITING VOLUNTEERS

By
Jacqueline Coinner, Executive Director
Volunteer Bureau of Greater Vancouver

When planning for the recruitment of volunteers, the name of the game is "imagination". We must be willing to try new methods and approaches for finding and interesting people in the jobs that need to be done. To do this, we must change, experiment and take risks.

Too often we think of the tried and true resources of volunteers such as clubs, church groups and women "in the home". In the past, most of our recruits were obtained from these sources, and interestingly enough, this is the group that the general public continues to view as doing most of the volunteer work. But not any more. Today we find that the demand for people's leisure or free time is highly competitive. There are many many things that people can do that are interesting, challenging, and that will bring them together with people in social and learning situations. Moreover, today's cost inflation has sent many of those "in the home", as well as many retired people, back to work. These facts, plus the fantastic development in the opportunities and variety of volunteer jobs, have created greater competition for volunteers. This leads us into the new sources and resources of volunteers and that's really great, as volunteering or citizen participation - call it what you like - is really for everybody. Everyone is a potential volunteer and will volunteer in some way. All we need to do is ask them.

DETERMINING YOUR REQUIREMENTS

In planning recruitment we must first determine goals or objectives. Thought and discussion must take place prior to the involvement of volunteers. Observe and talk with those involved in your community service program concerning ways in which volunteers will contribute. Solicit opinions on the most desirable personality characteristics of the people that are needed. Talk to the clients or patients, the board, committee members and the staff. By doing this, you will learn a great deal about attitudes and feelings concerning volunteers. Your enthusiasm and positive approach will help set the tone of the volunteer program. You will also be discovering where and how volunteers can become involved and how they can improve services for people. From the information gathered write the volunteer job descriptions. Have a clear idea of what you expect of people before you start to plan recruitment. One must also keep in mind that the job descriptions will need to be re-assessed by all concerned when the volunteer has been in the job for a month or so.

DEVELOPING A RECRUITING PLAN

When you know what you need, start planning. When it comes to planning two heads are better than one and three or four are even better. Form a small task force committee, one that is going to be action oriented. Its job will be to create a recruitment plan and to carry it out. Recruiting these resource people is good experience and will give you an idea of the skills and interests that are close at hand. Staff and volunteers working together in a community program must learn to share and form a partnership of service. You will be working with all concerned to interpret and establish this partnership in orientation and training sessions. What better way to understand how to share than by working with a small committee. When you are coordinating a volunteer program you are in fact running a personnel office. It is impossible to have all the skills needed to do the job. Start connecting with your community resources and recruit people with the skills needed to help get the job done.

A recruitment committee might include people with some of the following skills and experience: volunteers who know the service, an ex-client, someone who has used the service, a person with writing or public relations experience, a member of the staff - preferably one who is a member of a union (if you're unionized), a member of the board, a student counsellor or teacher from your local school, community college, or university, a working person who knows about flexible hours and the short work week, someone from a retirement group and so on. There are many possibilities. When you ask people to join this committee tell them why you especially need them and for how long you'll need them. By doing this you are giving them an understanding of the job to be done and a time commitment. When the committee is ready to go, plan an orientation and an information sharing meeting. At this meeting set out objectives which are clear and easy to understand. Help the group plan recruitment and set the tasks that each person will do prior to the next meeting. The committee should appoint a chairman and this appointment could be for six months or a year. Be optimistic and enthusiastic in your work with the group - this will arouse a sense of obligation and interest in the job to be done.

Now that you have a clear understanding of the when, where, what and why of your volunteer program and have the resources to help with the recruitment of volunteers, it's time to consider sources of volunteers and how to attract and interest the people you need. Recruiting should be a process rather than a problem; approach it with an open mind and with enthusiasm.

THE RECRUITING PROCESS

Determine Job Requirements → Identify Sources of Volunteers → Develop Recruiting Strategy → Introduction, Orientation, Training.

A Satisfied, Productive Volunteer

FLEXIBLE AND CREATIVE APPROACHES

There are changes taking place in business and industry which offer new resources and opportunities for recruitment. Short work weeks and flexible working hours are giving people larger packages of free time. We are really missing the boat if we do not reach this new resource and tell people of community service volunteer needs. People volunteer to learn and grow, to add some variety and a new dimension to their lives, and to feel a part of and to improve their community. What better opportunity for variety from a repetitious office or assembly-line job than helping with a recreation program, tutoring or visiting someone who can't get out. With flexible working hours people can be available when needed for after-school programs with kids or for institutional programs. For the jobs that must be done mornings or early afternoons consider approaching people on short work weeks and shift workers. Be flexible, adapt the volunteer program to those who are working ratating shifts. People know their work schedules a month in advance and are willing to make a commitment on that basis. Some firms will release staff for community work. They recognize that they are going to have a happier employee and will be making another positive investment in the community. Make a list of the larger companies in your city or those adjacent to your community. Contact and make an appointment to see the personnel director and the general manager. Talk with them about the community service you represent and your volunteer needs. Request a story in the company newsletter and space on the staff bulletin board. Leave lists of volunteer opportunities, application forms and brochures with the company representatives. Open up easy lines of communication, so that they will know how to put interested staff in touch with your organization. Many large companies have appointed a community service coordinator whose job is to research community volunteer needs and have this information available for employee groups or individuals.

Ask to speak with the union or labour representatives in the firm and supply them with similar information and channels of communication. Up-date and review this information seasonally and as your volunteer needs change. Many unions are establishing community service departments and are interested incommunity problems and needs. The training received in labour organizations prepares people for action and advocacy roles in the community.

Organized groups are a resource with unlimited possibilities. Service clubs, lodges, church groups, pensioners, students, and professional groups will work together on a cause or encourage their members to work individually to meet community needs. Keep in mind that quite often people will seek variety in their volunteer jobs and therefore do not want to be confined to the type of work for which they have been trained or educated. A practicing or retired teacher may or may not wish to tutor or work with children; a postman may prefer a sit-down job; a bus driver may choose something physically active. A retired gentleman might choose to work with a floor hockey team as it was a sport he enjoyed when he was young. Try not to "slot" people when considering potentially new areas of recruitment.

Low income groups are organizing themselves in advocacy volunteer roles for better housing and improved training opportunities. They are realizing that things can be changed and are increasingly unwilling to accept things the way they are. They are becoming involved with decision making in their communities and are willing to make a commitment to a volunteer job. Many of them as present or past recipients of services, will question "why" things are done a certain way and will bring a fresh outlook into many services. Out-of-pocket expenses such as bus fare, lunch, coffee or baby-sitting expenses, should be provided to enable this group and other limited income groups to volunteer.

Students are not a new resource of volunteers, but they require a new approach when you are planning for their recruitment. Only a few years ago we organized spring recruitment drives for teen summer volunteers. At that time, students were willing to give large blocks of time to summer volunteer jobs, and a few still do. Over the past few years an increasing number of younger students have been able to find paying jobs. Now we find ourselves competing for some of their limited leisure time. Many schools have citizenship and community recreation classes with student volunteer service as part of the course content. Some have class time allocated to volunteer work. A contact with the community recreation teachers and school counsellors will help you to get started. Student volunteers are enthusiastic, reliable and eager to learn. Many schools have future teachers and nurses clubs and members are looking for opportunities to get practical experience.

Community colleges and universities can be amazingly fruitful resource areas for the recruitment of community service workers. How to make contact and where to start may present a problem. Pick up the phone and talk to some student counsellors. Tell them about your organization and your volunteer needs. Ask them to help you with recruitment and to suggest contact people in courses or faculties related to your area of community service. Many instructors will encourage students to get out and get some practical experience along with the theory they are required to learn.

In many instances, volunteer activity may be designed into course requirements through group projects or field work. The Vancouver Volunteer Bureau's development of a Coordinator's Training Program, its evaluation and a supporting readings book were all prepared by two commerce classes at the University of British Columbia as class projects. We feel that this is a good example of "connecting" with the resources that our community holds. University and college students are usually available from October through April. Their study schedules present some re-organization problems for you; however, they are worth any minor inconvenience and are reliable and dedicated workers. Student information centres and campus newspapers will also help publicize your volunteer needs.

The retired people in a community should be one of the important new resources of volunteers. They are interested in doing <u>for</u> and <u>with</u> others, rather than just having things done for them. Community service is one way retirees can continue to contribute and offer their years of experience and knowledge. They are becoming organized and have their own newspapers and retirement clubs. Your recruitment program and the job opportunities you offer should be as well developed for the retired as for any other age group. If volunteering has been part of the pattern of one's life it's easy to stay involved. But people who have not been volunteers before retiring do not automatically feel the urge to start. Occasionally you will find it difficult to convince them of how much they have to give. They may be tuning out or turning off. If so, this is a real loss to their community and a challenge to your recruitment committee.

An increasing number of businesses, labour organizations, and adult education centres are developing planned retirement programs. Through your business contacts, make enquiries in your community about these programs. Then approach the organizations and request permission for a speaker from your agency to be a part of the programme. Community service is a good alternative for the newly retired when considering creative use of leisure time.

Many of the homebound institutionalized and the disabled are potential volunteers. It requires a certain amount of ingenuity to work out the logistics of bringing them to the job or taking the job to them. If they have a telephone they can be part of the telephone tree and keep in touch with others who are homebound, they can dispatch and coordinate drivers, or keep membership or volunteer files up to date. A disabled person coming back into an institution to do a volunteer job can help overcome the "you don't know what it's like" problems of rehabilitation. The unique contributions of those who in real life have experienced the problems and situations that they are now helping with constitute one of the most valuable services. Many of those who have been through drug addiction, alcoholism, jail, probation, divorce, psychiatric treatment, bankruptcy, mastectomy, cancer treatment or whatever, are willing to help those who are in the middle of these problems.

Today, people are mobile in their paying jobs and are also looking for variety and advancement in their community service work. Be aware of other volunteer programs in your community and get to know the people who are doing the organizing. Learn to share resource information and volunteers with them. Refer potential volunteers when they are not needed or not interested in the jobs you have to offer. Also share the experienced volunteers who have given you months and years of service, but are ready for a change. Better they remain productive in a new setting than become lost to the volunteer community. If your community has a Volunteer Bureau or Action Centre, you can count on them for support and information. They will have an overview of the volunteer community that will be helpful. Register your volunteer jobs with them and you can count on them to supplement the work you and the recruitment committee are doing.

When thinking of potential sources of volunteers we usually think of individuals or groups. Couples are becoming increasingly evident on the volunteer scene. Young couples and older couples are interested in doing community work together. In the middle age group you'll find families visiting other families with nursing and boarding home programs. Why not suggest that people work as a team? Volunteers are quite often paired up in museums and art gallery docent programs or in recreation and coaching activities. We will turn more people "on" to volunteering by suggesting jobs that can be done by couples families and teams and advertising these in the community. It will encourage those who have thought about it but have been too shy to try it on their own. It has unlimited recruitment possibilities.

We still live in an age in which people think of volunteering as a "female white-collar" task. We talk about equal opportunity in volunteer work, but are quite narrow when we are planning recruitment and developing volunteer jobs. Why don't more men volunteer? Why don't we plan for recruitment of the hard-hat trades, truck drivers, firemen,policemen or dock workers? They are hard to reach, but they <u>can</u> by reached through personnel offices and labour organizations and are more likely to respond to personal recruitment than to the usual publicity methods. We will have to go to them. Many of them do not see themselves working as volunteers for we have never gone after them (in a well planned systematic way). It will take effort and time to change our recruitment habits and people's attitudes towards <u>who</u> does the volunteer work in the community.

In 1963, 35.6% of the Canadian population were members of the work force. By 1973, 42.9% were working and this percentage will continue to climb. We must go to the market place and compete for some portion of people's leisure time. Careful and creative attention to all phases of the recruiting process can do much to enhance our effectiveness in obtaining appropriate numbers of volunteers who are prepared to contribute their unique talents and skills in voluntarism.

5. METHODS OF RECRUITING VOLUNTEERS

1. Use volunteer column in newspaper.
2. Multi-media: T.V., Ratio, etc.
3. Utilize already established resources - VAC, Volunteer Bureau.
4. Word of Mouth.
5. Speaking to organizations - Service Clubs, etc.
6. Distributing flyers.
7. Place ads in foreign language press.
8. Seek out second language groups.
9. Schools - language classes - colleges.
10. Intro of staff to program.
11. Interchange with other agencies.
12. Staff input.
13. Involve volunteer in recruiting.
14. Contact RSVP.
15. Churches.
16. Clubs - Service Clubs.
17. Analyze community.
18. Recruit in social situations.
19. Recruit through clients.
20. Form auxiliary.
21. Community Education.
22. Utilize consulates.
23. Be specific in design for requests.
24. Specific job descriptions.
25. Laundromats.
26. Speakers' Bureau.
27. Recruitment Workshop.
28. Have volunteers speak.
29. Senior Groups.
30. Newcomers - Welcome Wagon.

Week 3 - The Selection Process (Part II)

Topic 1 - Interviewing

- Techniques of interviewing
- Problems inherent in the process
- Preparing for the interview
- What the interview should accomplish

Topic 2 - Simulated Interviewing Session (Optional)

- Video tape of simulated interview prepared before-hand to show how mistakes are made, what points to look for, etc. and/or
- Video taping of two class members or perhaps, a class member and the lecturer in an interview situation. Replay of video tape, observations and criticism; and/or
- Class group is broken into smaller groups who move to separate rooms to engage in simulated interview situation. Two members of each group of four will act as interviewee and interviewer - two others as observers.

Topic 3 - Placement

- Matching the volunteer with the available jobs.

Topic 4 - Feedback

- Discussion of selection and placement
- Emphasis to be placed on continued contact and re-evaluation of the placed person

RESOURCE PERSON

Specialist on interviewing procedures.

READINGS

Core Readings

*1. "Guidelines for Interviewers", New York: Voluntary Action Centre of New York City, March, 1972.

Supplementary Readings

*1. Taylor, V.R., "A Hard Look at the Selection Interview", Public Personnel Review, 1969, 30(3), p. 148-154.

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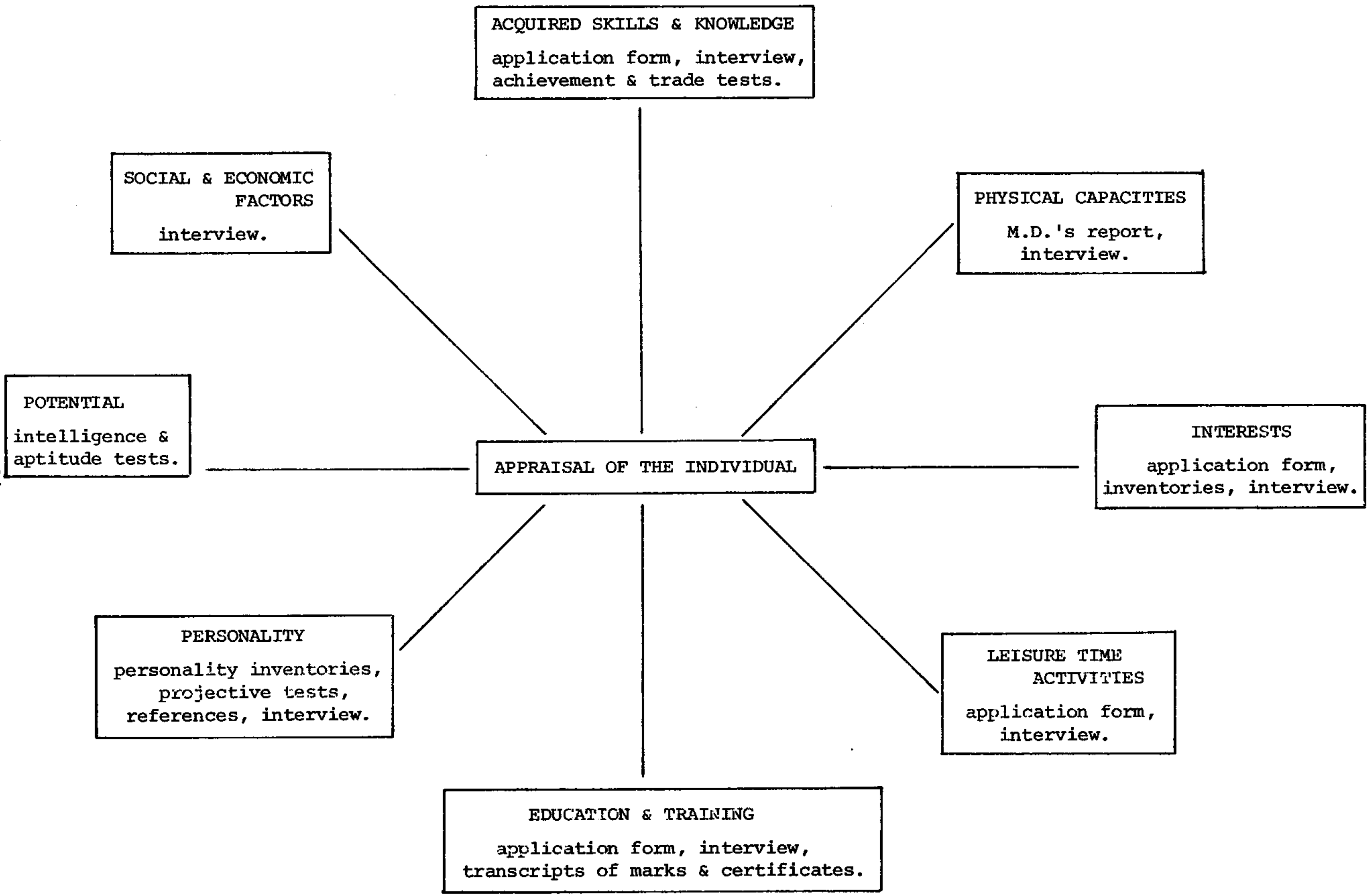
* included in Book of Readings

HANDOUTS

1. Appraisal of the Individual
2. Guidelines on Interviewing
3. Some Thoughts on Personnel Selection, and the Selection Interview

RELEVANT EXERCISES
PART II

Exercises 3 and 20 (Interviewing)
Exercises 1, 11, and 20 (Placement)


ACQUIRED SKILLS & KNOWLEDGE
application form, interview, achievement & trade tests.
SOCIAL & ECONOMIC FACTORS
interview.
PHYSICAL CAPACITIES
M.D.'s report, interview.
POTENTIAL
intelligence & aptitude tests.
APPRAISAL OF THE INDIVIDUAL
INTERESTS
application form, inventories, interview.
PERSONALITY
personality inventories, projective tests, references, interview.
LEISURE TIME ACTIVITIES
application form, interview.
EDUCATION & TRAINING
application form, interview, transcripts of marks & certificates.

GUIDELINES ON INTERVIEWING

Preparing for the Interview

1. Plan for the Interview: make sure there is a clear understanding of the time and place; arrange for a suitable physical setting (is it private? is it convenient? will you be interrupted by telephone calls?); notify the receptionist to expect the volunteer.
2. Before the interview, prepare yourself ahead of time. Review any necessary material, application forms, previous records, etc.; do you know what your objectives are for the interview?
3. Give consideration to the option of interviewing with a panel. A team can assist each other in getting the facts and in following up leads, getting more complete information.

DURING THE INTERVIEW:

4. Relax. Your effect (emotional appearance) is very important. Make the volunteer feel welcome and at ease.
5. Give the volunteer your full attention.
6. If possible, clarify the purpose of the interview at the start. As well, attempt to clarify both your expectations and those of the volunteer.
7. Don't jump to conclusions - when you don't understand ask for clarification.
8. Listen to what the volunteer says.
9. Observe the way in which he/she says it: especially pay attention to "nonverbal cues" including body posture, body movement, flushing, coughing; as well, be aware of the person's tone of voice, pace of speech.
10. Use "OPEN" rather than "CLOSED" questions where possible ("open" questions cannot be answered with either a simple yes or no).
11. At the end of the interview, summarize any decisions that have been reached and any planned actions, in order to make sure that you are both in agreement.
12. An applicant is entitled to fair play over the outcome of the interview.

AFTER THE INTERVIEW:

13. Write up any necessary notes, tasks, reminder for follow-up.
14. Remember: Interviewers should be trained. There are different methods of questioning and evaluating. Some are better than others, and some are appropriate to one situation but not to another.

Pat Ross
Spring/75

Some thoughts on personnel selection, and the selection interview

John Huberman

During the afternoon you received indoctrination regarding the process of interviewing and I assume that at this point you will want to know how to make the best use of the interview material. In other words: what do we look for in the interviewee? What kind of questions do we ask? How do we evaluate what we hear and what we observe?

While these are entirely legitimate questions, I must prepare you for a disappointment: neither I, nor I believe anyone else could supply the relevant answers for your particular setting. The best we can hope to achieve this afternoon is to start setting up a framework within which these questions might become answerable in perhaps 1 - 2 years from now. Even the framework may have to change as you go along.

Let me start out by categorizing the selection interview as just one particular tool which may - or may not - be part of the selection procedure. Let me also add that in many cases the interview has proven not only <u>not helpful</u> in predicting future performance, but has actually reduced the reliability of predictions based on other sources. For instance: if you want to predict success at first year university level, you will be more often correct if you consider <u>only</u> average grade-level during the last two years of high school - without interviewing the student, than if you predict his success knowing his high school grades <u>and</u> having interviewed him. On the other hand, interview results of management candidates under certain conditions have demonstrably contributed to the goodness of the prediction of their success or failure. I am mentioning these facts to emphasize that there is no magic set of questions which an interviewer should ask an applicant and expect that if he has the proper technique, prediction of success or failure will be easy. Things are just not that simple. Neither can we assume that the interview will be the crucial technique which leads to better prediction.

Before saying anything more about the interview let me make some - hopefully relevant - observations about the selection process in general. After all, as we have said, the interview is only one (and not even an absolutely necessary part) of the selection process.

Talking then about selection, let us first realize that selection is only a meaningful concept if there are more applicants than positions to be filled. Does this situation always prevail in recruiting volunteers?

Secondly: whatever the refinement of one or more selection devices: the <u>more</u> applicants we have to choose from, the more likely any of these devices is likely to be successful (everything else being equal).

Thus, we have learned one lesson: if we have very few applicants, then the first step we should take is to attempt to increase their number, rather than working on the refinement of our selection instruments. The latter may be more costly and difficult than obtaining more applicants. Or it may not.

Thirdly: how many applicants are actually "successful" now? (We will talk later about the difficulty of establishing criteria of "success" in your setting). If you review your files and find that, say 85 or 90 per cent of your volunteers are now "successful", I would suggest that no practical selection device, however refined, is likely to increase the percentage appreciably. On the other hand, if only 35-40% are now "successful" then you should certainly spend some time and effort on sharpening your selection tools. In other words: if most applicants are both able to do the job for which they apply and in fact carry it out satisfactorily, then why worry about "refined" selection by interview, or by other means?

Fourthly: let us examine what has been said in somewhat greater detail. If you review your files, you may find that most applicants for one or two particular assignments tend to be all, or practically all satisfactory, whereas the success ratio is low for another type of assignment. If such is the case, then obviously one should concentrate one's effort to finding the answers to improved selection methods for the "hard" assignment, and forget worrying about the one where nearly everyone works out well now. If I am permitted a guess, based purely on intuition, I would expect that this condition actually prevails in some of your settings. While I may be entirely wrong: I would be surprised if clerical volunteers for a once-a-week assignment would not tend to be highly "successful". After all only people skilled in typing would apply, and they must have some motivation for their applications. When it comes to caring for disturbed children, I would (conversely) expect to find less success. But only a statistical review of your files could provide the real answer.

Fifthly: whatever selection procedure, or combination of procedures we use, we will always obtain a certain proportion of "false positives" and "false negatives". False positives are the ones we accept when we shouldn't, because they will later turn out to be non-successful. False negatives are the ones we reject wrongly, because if we had accepted them, they would succeed. Now false negatives and false positives do not necessarily, or even usually, represent the same "loss". For higher level positions in any organization a "false positive" may cause a great deal of uproar and distress. In industry the appointment of the wrong president may bankrupt the company. At universities, he may provoke unncesssary student riots, or be unable to deal with them firmly if they occur. Among Air Force personnel in peacetime, - or Astronaut selection, the acceptance of the "wrong" person can lead to his death and the destruction of millions of dollars worth of equipment. Under any of those conditions it is obviously much wiser to err on the side of caution, that is, reject anyone about whom we have the least amount of doubt. This creates (potentially) sizeable numbers of "false negatives", but the cost of these would seem to be less than that of accepting even one false positive.

If on the other hand the position is such that a "failure" can cause only minimal trouble and the unsuccessful person can also be relatively easily replaced, then too much effort put into the selection effort would seem quite misplaced.

In deciding which way to go, it is very useful to attempt to put dollar values on the cost (1) of obtaining applicants and placing them, and (2) also on the cost of the "failure". Again, those ratios may be different for various jobs and agencies. However, only if we have this information, as well as the present success/failure ratio do we really possess rational data upon which to base the decision to concentrate more or less on selection, and at which agency (if any), or in regard to which particular occupation for which we process volunteers.

So much, then, for general considerations regarding selection. In what has been said so far, the word "success" and "failure" were frequently used, as if this would be a simple and obvious concept. But is it?

At the extremes, the concept is well defined. If someone offers her services, carries them out to everyone's satisfaction for 20 years, never misses an appointment except when desperately sick - well, few would argue that this is not a "successful" volunteer. At the other extreme: if a person offers to do two hours of typing Saturday morning and fails to show up twice in a row without preliminary warning, or some very good excuse afterwards, we might reasonably designate her as a "failure". But probably most cases are not that extreme and this is where the difficulty enters. What can we, and should we, reasonably expect of volunteers to categorize them as "successful"? This is really a very thorny question but one which you must come to grips with, preferably before you start worrying about refining selection procedures. I would hope that a start might even be made this very afternoon - if nothing else, then the appointment of a committee "to establish criteria for success vs. failure in selection". Unless such criteria are established you will be minus a yardstick with which to measure the success or failure of your own efforts at "better selection". I am making this suggestion in full cognizance of the inherent difficulties. In industry, the criterion can be mostly established without too much difficulty: on the production floor of a relatively simple industry, "success" might be reasonably defined as staying with the industry for at least two years at having not more than, say, 3 "unexplained" absences per year; and not getting involved in disciplinary procedures or dismissal for inability to perform the job. All these are relatively simple, clearcut criteria. They will vary from industry to industry, position to position, but not too much difficulty will be experienced in setting them up, simply because industry is a full-time occupation for most people in it. (It is much more difficult to set "success" criteria for managerial personnel, even in industry.)

It seems to me that you have a much more difficult problem, if for no other reason than because you are recruiting people for part-time work. If a person has full-time work, one expects him or her to set up their schedule of living to conform to the expectations of the job, and most people do it, or they are obvious "failures" as far as their employer is concerned.

When you consider a "regular" volunteer job, say 9 - 11 every Saturday morning for three months, it is again not too difficult to set up acceptable standards of attendance, and so we have something measurable.

But what about the volunteers who are "on call"? After all: nobody can be expected to sit at home waiting to be called in perhaps once a week, or whenever the agency needs him. If they are not at home when called, or if they are at home but inform us that they have made other plans, do we rate them as a "failure"?

I don't pretend to know how adequate standards should be set up for part time volunteers. I am bringing it up here in the hope that you will arrive at a reasonable solution. Perhaps it may be necessary also to establish different criteria of "success" of "failure" for different volunteer occupations, though this approach would introduce further complications into setting your own goals.

What I do strongly suggest, however, is that before we expend a great deal of effort to "improve" selection procedures we should generate a set of standards so that at any time we know how close we are toward achieving them. The early semanticist Wendell Johnson pointed to the danger inherent in chasing undefined, or ill-defined goals such as vague notions of "success". He suggests that many neurotic conditions have their roots in the feelings of inadequacy and impotence which necessarily crop up when we have no yardstick with which to measure our progress toward a goal - it is like trying to chase a rainbow which recedes the more you are running after it.

Well - let's take a great leap forward and assume that we have set ourselves realistic goals so we will then know whether (and to what extent) more sophisticated selection procedures pay off. What next?

The first step which you discussed this morning would be that of preparing a job description. If there is already at least one person doing the particular work for which we want to obtain new volunteers, a good method consists in asking the present incumbent to keep track for one or two days of all the things she does and list them, including the time which each activity tends to take. This initial list of activities should then be checked out with the agency supervisor and the necessary corrections and/or additions made. As a minimum, the job description should indicate the hours of work, frequency of required attendance, the principal elements of the work itself (that is typing, answering telephone, meeting people or not, contact with adults and/or children, need for car, etc.).

If there is no present incumbent, an interview with the supervisor of the agency becomes necessary.

Only after the job description is completed do we go on to the next step: specification of tentative personal attributes of the future volunteer. This list would include specific skills which seem required, such as typing, driving, entertaining children, ability to mix with such and such crowds, age and education (if these factors are deemed relevant), appearance, pleasant telephone voice, etc. Note that while some of these attributes (such as typing skill for a typist job) are not open to question, others may be less relevant to the proper performance of the work than you, or the agency supervisor, may think. Many businesses today set quite unreasonable minimum standards of education for a large variety of jobs. Obviously: the more stringent the specifications, the more difficult it will be to fill the vacancy. Hence it is a good idea to consult the files rather than to apply guess-work in setting up the specifications. In other words: if the agency supervisor specifies high school diploma, as a minimum standard, it is quite appropriate to ask what this judgement is based on. Did she have a person in this job who "failed" because of inadequate education? And conversely: had there never been someone performing this job satisfactorily who had less than grade 12?

The next step consists of developing suitable application forms - out of respect for the applicants who are after all not "applying" but offering their services free of charge, we had better call them "Biographical Summary" forms. Perhaps you need only one form to cover all positions or it may be advisable to develop two or more, one perhaps for clerical tasks and one for other positions which involve dealing with people.

These forms should be developed from the specification lists; in other words, they should contain questions regarding the areas where skills or certain personal attributes seem to be required.

In industry, we usually also ask for business reference, and at times for character references on these forms. It is up to you to decide whether in the volunteer setting this is not asking for too much - it may well be. Still, any time I have made an error in hiring (and I have made some real errors, in spite of Rorschach tests and other sophisticated selection instruments), I would have avoided it had I called one more previous employer and asked him some simple questions. If any volunteer handles money, a reference check is a must.

The next step in the proper industrial hiring procedure consists of asking the applicant to fill in the Biographical Summary form and then sending him away with the advice that he will be contacted by phone for an interview if and when an opening occurs, or is imminent. The purpose here is to give the personnel officer time to look over the application form carefully, decide whether the person seems potentially qualified and if so, check out his references. Again, you have to decide whether this might be too much of an imposition on a volunteer's time and patience. (By the way: if data from either the biographical summary, for from reference sources disqualify the person, he should be sent a note thanking him for his application but informing him that his qualifications do not appear consistent with the demands of the jobs. It is not fair to keep people hanging in mid-air, expecting us to call them when we have no intention of doing so).

The next step in the screening procedure would not be the interview. I mentioned at the beginning of the talk, however, that quite a number of Companies either have no interview at all with their prospective employees, or use it minimally - just to look the person over and see whether they have some major physical defect, and perhaps to give the employee whatever information he may desire about the Company. Instead of relying on the interview for prediction or success, they have developed weighted application blanks and use these to decide whether to hire or not. Let me tell you how this system works. It can be made to work only where there is a reasonable turn-over and quite a number of similar jobs in the Company.

The first step is again to establish a criterion of success and failure. Let us say that "staying on the job for a year with no disciplinary incidents during this period" is decided upon as the criterion of success.

The Company now develops a fairly extensive application form; for a period of perhaps two years they hire everyone who is not obviously unsuitable, and simply lock up the biographical summaries. At the end of the two year period the summaries are separated into two piles: those of hirees who by now are known to be "successes" and those who have turned out "failures". Now each item on the biographical summaries is checked to determine if there are significant differences between the group-averages. For instance, it may be found that 80% of the "successes" were married, but only 50% of the "failures". So, as a first approximation, one would attach 8 points to being married, but only 5 points for not being married. Let's say that another difference emerges in regard to educational level. Say that we find that 70% of the success cases had grade 12 or more education, but only 40% of the "failures" had achieved that educational level. So we give 7 points to grade 12-and-over education, and 4 points to lesser schooling. Items where no significant differences occur are simply dropped. You notice that by this procedure the "success" group tends to accumulate a larger number of points than the "failure" group. What comes out of this comparison then is a formula where various items of the biographical summary form are translated into weights, the weights are simply added up and if the total exceeds a certain "cutting point", the individual is deemed to belong to the "success" group and hired; if it is below the cutting point, he is rejected.

Two remarks are in order. The development of weights is somewhat more complicated than I have indicated but essentially the procedure is just what I have described. The second remark refers to what is known as "validation procedure" of the formula which has been developed. Initially, I said that after the two year period, <u>all</u> applications are put into two piles and the differences among items examined. In fact, only roughly half of each pile would be used to develop the weighting formula, and then the formula would be applied to the remaining halves of the piles to check whether it predicts resonably accurately the actual successes and failures of those in the second halves of the piles. Lastly, some statistical procedures called "significance tests" are applied to make doubly sure that we are not dealing simply with chance phenomena.

Years ago the development of a weighted application blank required a good deal of statistical work and some pretty tedious calculations. Today a computer can do the work in probably less than a minute. The computer at UBC can deal with as many as 80 items and "try them out" - that is, decide which should be part of the final formula, and with what weight. All that is needed is to punch the items in a coded form onto IBM cards and shove the lot into the computer!

Short of weighted application forms, we will now turn to the interview. Hopefully, before the interview we have looked over the application form and noted any points which are omitted. Regardless of how carefully an application form is constructed, you will find that at least one in three will not be filled out completely. The first purpose of the interview is then to obtain the data which should have been on the application form.

The second purpose might then be to obtain such information which we believe to be relevant to "success" but about which, for one reason or another, no question was asked on the application form.

Thirdly: we may notice some information on the form which casts doubt that the applicant would be satisfied with the job; for instance, we may notice that he or she lives very far from the location of the agency. So we would ask whether this presents any problems. Or the applicant may have indicated that she has small children. How are they going to be looked after while she is at the agency?

Next we might ask why the applicant is interested in working with the particular agency that she has picked. If we note that (according to our best information about the particular agency) the conditions are different from the expectation of the prospective volunteer, we would want to bring this fact to her attention.

If the volunteer has had previous volunteering experience, we may well ask which of these she enjoyed most, and why; and which she liked least, and why. Again: if we know our agencies, this information may help us to predict whether the volunteer will find work there congenial or not.

If there is any chance that the job may develop into a permanent, paid one, we should also enquire whether in such case the applicant would be interested in being considered. If such is the case, more elaborate review of all their previous employments is advisable. In regard to <u>each</u>, we would typically ask minimally the following questions:

1. How did you feel about this position?
2. What if anything did you particularly like about it?
3. What did you dislike about it?
4. What led to your leaving it?
5. Why did you leave just then?

Usually, we will find a pattern emerging - a pattern of likes and dislikes, and a pattern of reaction. Once such a pattern is discovered, the best prediction is that it will carry on relatively unchanged. Things are really as simple as this: If I notice that a person's average job tenure was 2 years, plus-minus perhaps one, I would predict (and be very nearly always correct) by predicting that his next job tenure will be 2 years, approximately - and never mind what he tells me about the reasons for the length of tenures, unless the termination of employment was completely beyond his control (for instance several companies he worked for uniformly suspended operations). What I am suggesting is that, while we ask the questions which I have listed, the answers should normally be given less weight in predicting the future behaviour of the applicant than the data derived simply from a review of the biographical summary form. Our predictions based on these "facts" will at times turn out wrong, but they are likely to be right more often than if we base our predictions on the reasons supplied by the interviewee. Still, we should try to somehow integrate the factual and the "verbal" informations - after all, they come from the same person and, if we dig carefully enough, we should be able, in most cases, to form a picture which is not self-contradictory. And of course, when we deal with paid, hopefully permanent positions, we must not forget checking with previous employers, preferably the person's immediate former boss rather than the Personnel Department. Phone calls are almost always more useful than written enquiries.

What I have said implies that a lot of homework needs to be done before one can meaningfully decide on selection policy and the best methods. Perhaps you can do some of this work during the following year and then analyze the results and come out with fairly definite answers. Hopefully, a start might be made right now on the establishment of criteria for "success" and "failure" - without which little meaningful action is possible. We have to know what we aim at before worrying how to get there.

Let me summarize the major points of this address.

1. What to look for in the selection process depends on:
   a) they type of position to be filled, based on job description
   b) knowledge of reasons for "failures" in the past
   c) availability of definite criteria for "success" and "failure"

2. Whether to invest time and money in attempts at improving the selection process depends on:
   a) present success/failure ratio; if there are few failures now, why worry?
   b) availability (or the potential to make available) surplus applicants - the larger the pool, the longer selection takes but the better chance there is of finding the best applicant
   c) assumed "loss" involved in accepting "false positives": the more serious the assumed loss, or damage, or nuisance of making the wrong selection, the more refined the selection procedures should be. If the loss is minimal - again; why worry?

3. The interview is only one, and not necessarily the most "potent" selection device. Much can be said in favor of developing weighted application form, and carrying out reference checks regarding attendance habits, reliability, ability of the applicant to get along with peers and superiors, etc. (The method to construct such form is well described in a small book: England - Weighted Application Forms. The Vancouver Public Library has a copy.)

4. In the interview (and from the application form) we attempt to discover recurring behavior patterns. Once such patterns have been discovered, the best prediction is that they will be maintained. (The prediction will fail at times because some drastic changes may have occurred in the applicant's way of life - e.g. marriage, divorce, etc.) but it will be more often right than wrong. Actual behavior (e.g. short employment periods) are to be focused on; how the applicant explains them should normally be given much less weight in formulating our predictions.

5. We also use the interview to fill in gaps in the application form, and to clarify any doubts about the suitability of the applicant for the position, <u>and vice-versa</u>. A simple device which I have found very effective is to hand the job description to the applicant, ask her to read it over and tell us whether it sounds attractive.

CHAPTER 3: ORIENTATION AND TRAINING

Once the agency has recruited and selected the required number of volunteers, they must be oriented to their new environment and trained in the necessary skills. These topics are covered in weeks 4 and 5. Week 4 deals with orientation and week 5 with training techniques.

Week 4 - Orientation and Training (Part I)

Topic 1 - Orientation

- Orientation; how to place the individual in the job and provide him/her with the information needed, while at the same time, allowing the individual to learn for himself.
- Methods of orientation

Topic 2 - Problems encountered with new Volunteers

- Absenteeism
- Dissatisfaction with position or job.
- Trouble getting along with co-workers or supervisor.
- Problems in presenting service.

Topic 3 - Reviewing and Re-assigning the Volunteer

- How it can be done

RESOURCE PERSON

An individual involved in developing corporate orientation programs along with a someone skilled in volunteerism.

READINGS

*1. MacBain, N., "Orienting the New Volunteer", The Volunteer Leader, 1970, 11.

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* included in Book of Readings

Week 5 - Actual Training Methods for Trainers

Topic 1 - How to Assess the Training Needs of the Agency

- Given the job that is being filled, the skill of the volunteer co-ordinator and overall volunteer program - what methods of training will be best utilized to meet objectives.

Topic 2 - Training Methods for Volunteers

- A discussion of the following training techniques; emphasizing when to use them, advantages and disadvantages of use.
- A "How-to" approach.
- Training methods that should be discussed:
  (1) lectures;
  (2) workshops;
  (3) observation of actual volunteering;
  (4) role-play;
  (5) brainstorming;
  (6) case method;
  (7) video tape replay;
  (8) buddy system;
  (9) any other techniques deemed important by instructor.

Topic 3 - Role-playing episode

- Use of role-playing episode from a developed case having something to do with volunteerism and/or Bureau problems, i.e. conflict between managers and employees or supervisors and volunteers. (refer to Part II)
- Optional use of video tape feedback as a way of aiding observations and criticism of the process.
- The resource person can discuss with participants and observers how they felt, how the technique could be used in their organization, what its perceived advantages and disadvantages were, etc.
- Tie in what role-playing technique offers vis-a-vis communications within organization and between people.

RESOURCE PERSON

Training director or supervisor; teacher; professor.

READINGS

Core Readings

*1. Morgenweck, C., "Developing Training Techniques", The Volunteer Leader, 1972, II.
*2. Lippitt, R., "Training for Participation", Adult Leadership, 1965, June, p. 43-44+.

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* included in Book of Readings

Supplementary Readings

*1. Stenzel, A.K., "In-Service Training for Volunteer Group Leaders", Adult Leadership, 1965, June, p. 57-58+.
2. Wolfe, J., "Evaluating the Training Effort", Training and Development Journal, 1973, May, p. 20-27.
*3. Wohlking, W. & Weiner, H., "Structured and Spontaneous Role Playing: Contrast and Comparison", Training and Development Journal, 1971, January, p. 8-14.

HANDOUTS

1. A Comparison of Training Techniques
2. Planning a Film Program
3. Directed Discussion Method of Instruction
4. The Lecture Method of Instruction
5. Giving a Demonstration
6. On-The-Job Training Method of Instruction
7. Group Performance and Coach-Pupil Methods of Teaching
8. Incident Process
9. Analysis of Cases
10. Training Applications of Videotape
11. Use of Oral Questions
12. Some Tips on Speaking for Instructors
13. Instructor Attributes: Good and Bad

RELEVANT EXERCISES FROM PART II

Exercises 2 and 19 (Brainstorming)

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* included in Book of Readings

A COMPARISON OF TRAINING TECHNIQUES

by

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Since the days of the little red school house, much progress has been made in developing teaching techniques to supplement or replace the traditional lecture method of instruction. All of us at one time or another have been bored out of our wits by a dull, droning preacher or teacher who seemed to continue for an endless eon of time. In such a situation, we can all recall how our thoughts wandered to other topics or how, perhaps, we just tended to go to sleep.

Happily, today, there are available a number of exciting new teaching techniques and devices with which an instructor can develop an interesting and content-laden training course particularly suited to his training needs. Like all tools, various training techniques have unique strengths and weaknesses and these are very different from technique to technique. In a recent study comparing the ratings of training directors on effectiveness of alternative training methods, no technique examined seemed to be rated high on all training objectives. (Carroll, Paine, and Ivancevich, 1972).

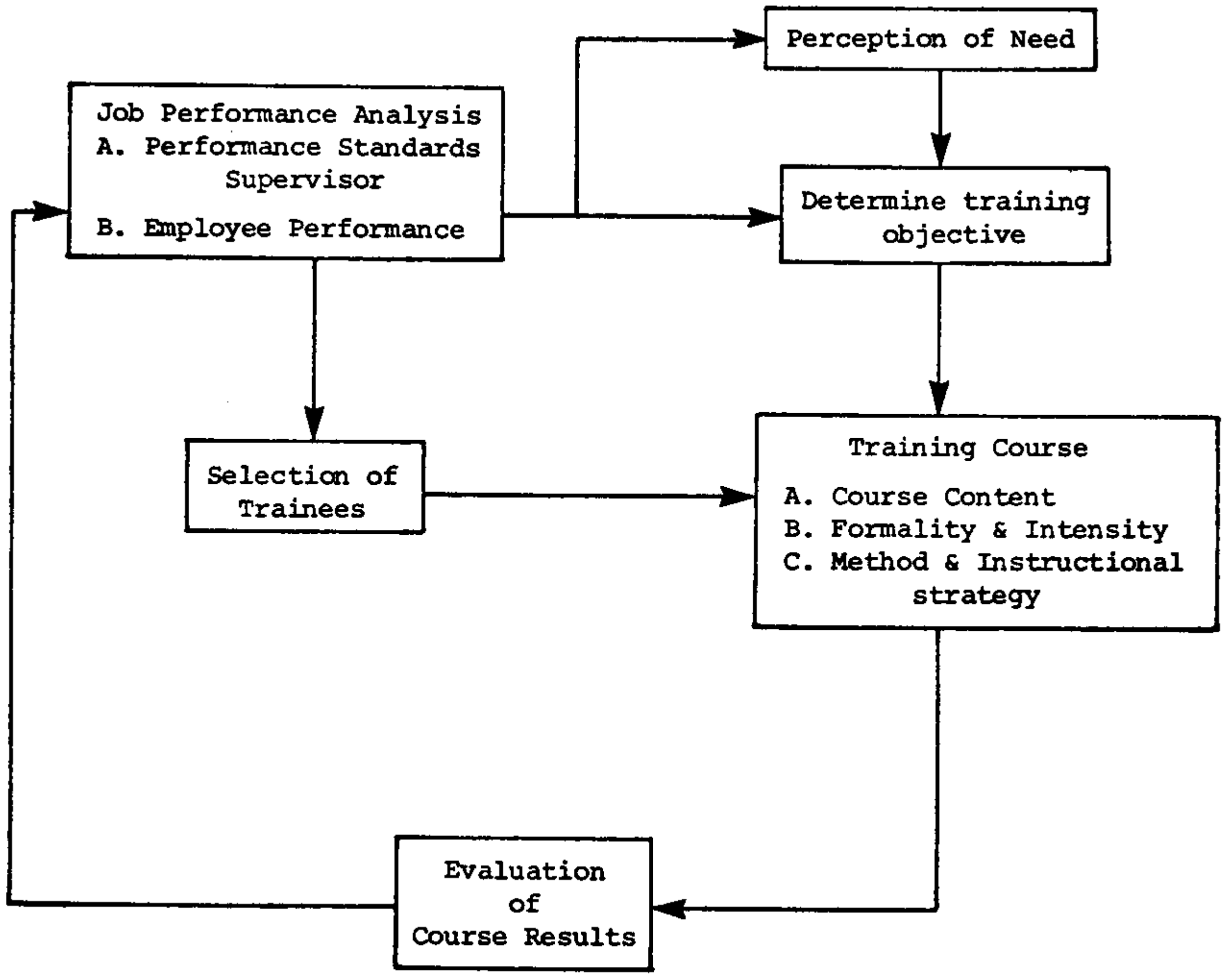
Therefore, it is very important that leaders of training programmes for volunteers or other groups be familiar with the relative strong points and limitations of the major training techniques which are available to us. The purpose of this paper is to highlight and compare a number of these established and successful techniques.

Designing a training course and choosing the appropriate training techniques is not an arbitrary process and does not take place in isolation. The development of a training course is very much a function of (1) the trainees and their characteristics and (2) the training objectives to be accomplished. Quite often trainees, as a group, will have some common characteristics. For example, they all may be approximately the same age, or the same sex, or they may possess similar educational backgrounds. The level of complexity of a training course for a group of professional people may be necessarily much higher than that which is required for a group of unskilled or partially skilled persons. Groups of individuals used to exercising their own initiative in solving problems and in discussing their viewpoints with others may progress much more quickly and with less frustration when a participatory training method is used while groups which have been subjected to a high degree of structuring in their previous work or educational experiences may find a highly participatory training technique confusing and frustrating. Different trainee groups, then, require different methods of training.

Almost all training courses will be designed to accomplish more than one training objective and even when only one training objective has been specified, other unspecified objectives will be reached. For example, a group of people may be brought together for a training programme designed to develop hospital service volunteers. In addition to learning how to be a good hospital service volunteer, the trainees, because they have been brought together, will have a considerable opportunity to interact with one another and to share attitudes about voluntarism. Thus, in addition to the training objective, some attitudinal change will also take place. Figure 1 presents a generalized model of the training function and clearly points out the interactive and feedback nature of the numerous components of a training programme.

Figure 1

GENERALIZED MODEL of the TRAINING FUNCTION



As indicated in Figure 1, the choice of method and instructional strategy follows the specification of course content and the determination of the type and intensity of training which will be presented.

Course Content

No matter what the course content happens to be; whether we have a course on some subject in rehabilitation therapy, or jam-making, our course content may be categorized into one or more of five major categories:

a. knowledge acquisition and retention
b. problem solving skills
c. interpersonal skills
d. attitude change
e. psychomotor skills

These five categories are not necessarily independent; in other words, the training programme may be designed to enable the trainees to acquire knowledge and to use that knowledge in a practical way through problem solving. In this situation, part of the necessary learning in the course might be based on lecture input and parts might be based on the development of problem solving skill through the use of a well chosen case.

Formality and Intensity

The most formalized courses are those which are permanent in nature and which lead to granting of a certificate, diploma, degree or other formal recognition. Generally, these kinds of courses are presented under the auspices of a community educational series, a university or some other teaching institution. The more formal the course is to be, the more constraints the instructor is likely to face in course development. The structure of an informal course, on the other hand offers a great deal of scope for the instructor to exercise his creativity and imagination. Here again, however, one finds advantages and disadvantages. There may be many advantages associated with the development of a formal course leading to some form of certification.

Intensity refers to the frequency of exposure to course content and the amount of time during which the trainee is to be exposed. For example, the instructor may wish to consider a two-day long weekend seminar as an alternative to six one-hour evening training sessions. Knowledge acquisition and retention are certainly affected by course intensity and the development of interpersonal skills may be quite different under situations of differing intensities even though the actual time of course contact is identical. Moreover, several of the training techniques which are available to instructors require rather intense exposures for maximum effectiveness. For example, sensitivity training may require several days.

Method and Instructional Strategy

Table 1 presents a comparison of training techniques in very brief summary form. For each method, the major characteristics of the method are enumerated and the primary teaching objective is indicated. Probably the main reasons why the lecture method has been and continues to be the most popular method of instruction are that the lecture provided the novice instructor with almost total control over his subject and over the classroom at all times. Only the course material pre-designated by the instructor or presentation is covered, therefore the instructor does not have to deal with unanticipated and possibly embarassing questions. Furthermore, the lecture method does not require any special tools, gimmicks or equipment. In contrast, some of the other teaching techniques are very costly and difficult to obtain (films) and require specialized equipment (games, videotape, or teaching machines). A major problem facing the instructor concerns the acquisition of suitable information concerning the availability of some of the newer techniques.

The public school system in any medium sized or major city generally has an audiovisual instruction centre operated by a specialist in training techniques and this person typically maintains catalogues of materials describing the wide variety of teaching aids available on most topics. Films may be ordered in advance either from local sources or from agencies from metropolitan areas. Municipal or university libraries contain programmed texts on a wide variety of topics.

For specialized purposes, the instructor may decide to write a case or an incident for his own use. Some of the most effective cases are developed by the instructor himself or by students in previous classes through communication of their own experiences.

Training Techniques and Motivation

Several of the training techniques we have considered are tremendously powerful in arousing the attention and interest of trainees. In a well constructed role play, some trainees have been known to become so involved with their roles that it has been difficult for them to extract themselves and return to the original course content under consideration. Cases sometimes produce similar results if a particularly relevant discussion develops. Because of the competitive aspect built in to business games, trainees' attention sometimes becomes focussed on the competitive environment to the extent that learning actually suffers.

One study compared the amount of learning which took place in matched small groups which were exposed to identical content using the case method or using a problem oriented series of business games. Overall learning, as measured by the composite evaluation based on fact mastery, explicitness of concept, general and structural learning, and logical reasoning ability, was better achieved through use of case method (Moore, 1967). But when the trainees were questioned concerning their motivation, they were much more positively inclined towards the problem oriented series of games, as indicated in Table 2.

Figure 2

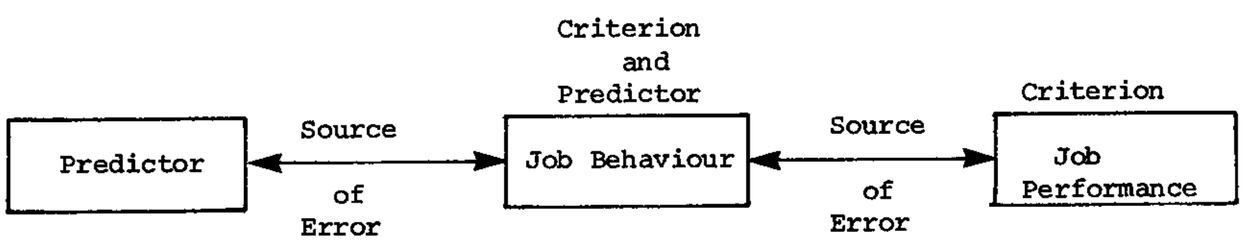
THE SELECTION PROCESS FOR VOLUNTEERS

A. Typical Selection Procedure

The process is dependent on the job level being entered.

Level	SI	Application	Interview(s)	Orientation
1	X	X		
2	X	X	X	
3	X	X		X
4	X	X	X	X

B. The Psychological Model



The results of this study suggest an aspect of selecting training techniques which seems to have been largely overlooked by most instructors - the relation of interest and motivation to learning. Perhaps more important than the degree of interest per se is the pattern of motivation produced by a high degree of interest. Motivation, it will be remembered, is directional in nature, i.e. motivation is goal oriented. Therefore, in order to be effective, the training technique which is chosen must (1) stimulate the interest of the trainee and (2) motivate the trainee to acquire or achieve the desired concept or skill specified for learning. A highly interesting training technique or gimmick, if oriented in a direction away from the specified learning objective, can actually be detrimental to learning effectiveness.

In conclusion, it is apparent to us that the person who wishes to conduct a successful training programme for volunteers has available a wide choice of teaching techniques. If possible, the most effective programmes make use of a combination of more than one technique in order to maintain a state of interest arousal during the entire training course. The instructor should be watching his class for cues to help indicate when a change of pace is necessary and when a new teaching technique might be appropriate. On the other hand, informal, participatory training sessions, if too non-directive, may not accomplish very much from a learning standpoint. Finally, for instructors, as in many other areas of activity, experience seems to be a very good teacher.

Table 1

A COMPARISON OF TRAINING TECHNIQUES

METHOD	CHARACTERISTICS	PRIMARY OBJECTIVE
Lecture	a.one-way communication b.speedy c.orderly exact coverage d.total instructor control e.no deviation from subject	fact mastery of preselected material
Lecture-discussion (discussion follows lecture or is permitted throughout)	a.one-way, two-way b.orderly coverage c.controlled deviation from lecture d.high instructor control e.slower than lecture f.questions & disagreements encouraged	fact mastery of preselected plus additional material; development of Logical reasoning ability & critical attitude; control of individual involvement
Demonstration with narrative (usually followed by student replication)	a.one-way, two-way b.orderly coverage c.physical performance d.high instructor control e.errors immediately seen and corrected f.can be adjusted to learning speed of student g.follow-up desirable	master of physical tasks or routine mental visual techniques establishment of good superior-subordinate peer working relationships

Table 1 (continued)

A COMPARISON OF TRAINING TECHNIQUES

METHOD	CHARACTERISTICS	PRIMARY OBJECTIVE
Cases (decision-making, illustrative, group analysis)	a.multiway communication b.built around situational setting c.medium to low instructor control d.forces explicit definition of problems and issues e.slow f.questions, disagreement emotional involvement	logical reasoning ability and critical attitude; explicit definition of problems; recognition of areas of information gap; development of individual and group decision-making ability; development of perception and empathy; communication of ideas to others
Role play (students as actors in a sequence of activity; followed by discussion)	a.multiway communication; partially controlled b.realism depends on skill of actors c.low instructor control d.encourages emotional involvement in the situational setting e.slow	development of perception and empathy
Incident process (one incident or limited information is introduced-the participants use questions to uncover additional relevant information)	a. two-way communication b. partially controlled c. questioning attitude d. slow e. new and not yet widely used	teaches importance of and difficulty of obtaining material; teaches orderly logical decision making
In-basket (memos, letters and reports are presented the student in sequence - student takes required action)	a. two-way written communication b. high situational control c. written requests for information may or may not be allowed	decision-making with incomplete information; orderly and logical approach to many types of managerial problems
Sensitivity training (leaderless group discussion; participants are stripped of identity and title)	a. multi-way communication b. very high and potentially volatile emotional c. demands a highly skilled monitor-trainer d. side effects are unpredictable	development of self and other awareness & heightening of perception and empathy

Table 1 (continued)

A COMPARISON OF TRAINING TECHNIQUES

METHOD	CHARACTERISTICS	PRIMARY OBJECTIVE
Games (situational model in which sequential decision-making is required)	a. one-way or multi-way sequential decisions b. prior period determination of present variables c. feedback d. fast e. high student involvement	mastery of decision techniques; experience developed synthetically
Films and videotape presentation	a. one-way communication unless followed by discussion b. high initial audience appeal c. audio-visual sensory perception d. high degree of action e. versatile f. requires equipment and trained operator g. capable of high degree of refinement in presentation	multi-purpose; main advantages are audio-visual communication features & switching of instructional burden to the film; video-tape offers quick replay for feed-back and reinforcement. Possible cost savings through volume use
Programmed instruction (teaching machines or programmed texts)	a. speed is adjusted to that of student b. errors are immediately explained c. subject matter highly controlled d. limited two-way communication e. availability may be somewhat limited	fact mastery of subject matter

Table 2

COMMENTS CONCERNING MOTIVATION:

CASE METHOD vs. PROBLEM ORIENTED GAME

Comment Category	Game Groups		Case Groups	
	First Questionnaire	Final Questionnaire	First Questionnaire	Final Questionnaire
Positive	37	32	13	13
Negative	0	5	23	15

References:

Carroll, S.J. Jr., Paine, F.T. and Ivancevich, J.J., "The Relative Effectiveness of Training Methods-Expert Opinion and Research". Personnel Psychology, 1972, 25 (3), 495-510.

Moore, L.F., "Business Games vs. Cases as Tools of Learning", Training and Development Journal, 1967, 21 (10), 13-23.

SOURCES OF FILMS

Canadian Film Institute | General Inquiry
1762 Carling Avenue
Ottawa 13, Ontario

National Health and Welfare Film Library Catalogue, 1967 (write to Canadian Film Institute)

National Medical and Biological Film Library Catalogue, 1958. (being revised - write to Canadian Film Institute)

Audio-Visual Department,
Provincial Mental Health Services
Riverview Mental Hospital
Essendale, B.C.

Health Branch Films and Filmstrips,
Dept. of Health Services & Hospital Insurance,
Parliament Buildings,
Victoria, B.C.
(order through your area Public Health Nurse)

Pharmaceutical Companies
(contact local salesman)

16mm. Motion Pictures - 1967, '68.
Audio Visual Services,
Department of University Extension,
U.B.C.
Vancouver 8, B.C. (228-2522)
(see Human Relations section, pp. 17-18.

DIRECTED DISCUSSION METHOD OF INSTRUCTION

This method is an orderly conversation, usually questions and answers between the instructor and trainee. This method is excellent to use when the trainees have a background in the subject under discussion and the purpose is to organize or analyze the knowledge and experience of the trainees. This method may also be used in connection with assigned reading and projects that the trainees are responsible for. In general, the instructor does not teach - he merely acts as a referee and keeps the discussion on the right track as well as seeing to it that everyone participates. Where specific technical information is concerned he can point out the correct answers and data or tell where it can be secured.

1. Advantages:
   a. Oral participation by the trainees.
   b. Subjects can be analyzed.
   c. Checks on trainee information and understanding.
   d. Any subject can be discussed.
   e. May be used for short-time elements of 5 to 15 minutes in any regular classroom, laboratory or shop session.
   f. Excellent follow-up after a written examination.
   g. Excellent as a means to solve personnel and technical problems.

2. Preparation for a directed discussion:
   a. Have the objective clearly in mind.
   b. Make a list of key points pertaining to the subject or problems.
   c. Prepare several important questions in advance. These can be used to stimulate discussion and to direct thinking along desired lines.
   d. Have a blackboard, grocery paper or overhead projector available as a means to record points during the discussion.
   e. Prepare a seating chart, duplicate it and give everyone a copy. (This is not necessary if everyone knows each other.)

3. Discussion procedures:
   a. State objective and as appropriate ask a question to start the discussion.
   b. Introduce everyone if strangers. Distribute seating chart.
   c. Record ideas and proposals. (Use blackboard, grocery paper or the overhead projector.)
   d. The instructor should offer suggestions and ask questions. He should avoid direct positive statements that are the final answers.
   e. Avoid dominating the discussion. Let the trainees run the show, just keep them on the right track.
   f. If incorrect answers and statements are made, have them corrected by the trainees themselves if possible.
   g. Be sure to call on those who do not volunteer.
   h. Summarize the points and ideas expressed during the discussion.

THE LECTURE METHOD OF INSTRUCTION

The lecture method is an oral presentation of facts, ideas and principles for the students to learn. Attitudes, technical knowledge, and general information may be presented by the lecture method.

A. Reasons for use - to create interest, to influence or convince, to stimulate, to mold opinion, to clarify ideas and technical principles, to promote subsequent activity, to impart information, to explain the how and the why, and to develop critical thinking.

B. Characteristics.
   1. Lecturer must be expert in subject knowledge and delivery in order to be interesting and effective.
   2. It puts emphasis on instructor activity rather than pupil activity.
   3. Encourages receptivity on part of learner.
   4. Its lack of visual appeal can be partly offset by use of the blackboard, charts, maps, models, mockups and other training aids.
   5. Requires follow-up activity with tests, projects and job situations if learning is to be effective.

C. Suggestions for preparation
   1. Adapt lecture material and vocabulary to experience levels of the trainees.
   2. Determine major points to be covered.
   3. Study best available references.
   4. Arrange material in best possible instructional order.
   5. Plan to use charts, drawings and other illustrations.
   6. List your major points to be covered on a lesson plan which can be used as a guide while presenting your lecture. List the data and ideas in outline form. Avoid the essay form when making a lesson plan.
   7. Rehearse lecture, preferably out loud.
   8. Have prepared questions and problems.
   9. Get variety into your presentation.
   10. Use training aids, such as films, slides, models, mockups and displays.
   11. Be sure everyone can hear and understand you. If the group is large it may be necessary to use a public address system. Be sure all students can easily see your illustrations.
   12. Prepare an effective introduction to your lecture. It should be interesting, take not more than 2-5 minutes and result in the students being alert to the main subject which follows. Stories and illustrations used should be related to the subject.

D. A short course in public speaking techniques is very helpful to the instructor who uses the lecture method of instruction.

GIVING A DEMONSTRATION

A. Definition.
   1. A demonstration is the process of showing and explaining to trainees how to do something with the tools, equipment and as well, shop work.
   2. Demonstrations are essential when learning involves developing skill in performance of operations and knowledge of how tools and equipment are operated. Early opportunity for students to apply what has been demonstrated must be provided.
   3. The demonstration is an essential part of on-the-job, coach-pupil, and group performance methods of instruction.

B. Suggestions for preparation.
   1. Use actual job equipment, tools and materials.
   2. Prepare job sheets which the students can use for review and to provide the many small details about the job.
   3. Make a job analysis if data is not already available.
   4. Make and use a lesson plan; include step by step procedures.
   5. Select necessary tools, materials, equipment and training aids. Arrange for procurement in advance.
   6. Arrange all demonstration items for most effective use. Be sure all students will be able to hear and see.
   7. Try out or preview the demonstration before class time.
   8. Prepare a written quiz and/or a performance test.
   9. Plan to use assistants when possible.
   10. Use and develop training aids.

C. Suggestions for increasing effectiveness of the demonstration.
   1. Make demonstration short but go slowly.
   2. Face trainees when talking and demonstrate from the trainees viewpoint. (Otherwise they see it backwards).
   3. Put special emphasis on important points. List on blackboard or with the overhead projector. Grocery paper and crayons can also be used.
   4. Use trainee assistance when possible.
   5. Emphasize safety precautions.
   6. Use skillful trainees when repeating demonstrations for unskilled trainees or when giving a review.
   7. Use oral questioning to check the trainees' understanding of skills presented.
   8. Test or check promptly after the demonstration.
   9. Perform the steps accurately under the correct conditions similar to those under which the trainees will work.
   10. Clarify the meaning of all new terms and parts.
   11. Trainee activity should follow as soon as possible after a demonstration.
   12. Combine with coach-pupil or group performance method whenever possible.

ON-THE-JOB TRAINING METHOD OF INSTRUCTION

A. Introduction to the Job.
   1. Acquaint trainee with the importance of the job and its relationship to the final product.
   2. Introduce him to co-workers and others he will associate with.
   3. Give necessary instruction booklets, if any, on safety-first or other details about the job.
   4. Issue any personal tools, safety shoes or goggles, etc.

B. Instructor Tells and Does.
   1. Demonstrate and explain the job, step by step. Make sure he sees it from the same viewpoint as the instructor.
      Give reasons for each step.
   2. Answer questions carefully and explicitly.
   3. Remember that we learn new things slowly and that errors are very likely to happen.

C. Trainee Tells While Instructor Does.
   1. Have the trainee tell each step for you to do in the correct order and also explain why. This permits the instructor to check if the trainee actually knows. It also prevents injuries, damage to equipment and waste of materials.
   2. Repeat any skill or operation not clear to the trainee.
      Answer questions clearly.

D. Trainee Tells and Does.
   1. Turn the job over the learner.
   2. Have the trainee explain each step as he does it.
   3. Without embarassing him, correct his errors, point out refinement of method until instructor is sure the trainee can do the job.
   4. On some jobs a performance type test can be given as a check on learning.

E. Trainees Practice Under Supervision.
   1. Check trainee's performance at frequent intervals to make sure that good work habits are being formed.
   2. Encourage questions and give clear answers to any phase the trainee brings up.
   3. Continue close supervision until you and trainee are both confident that the trainee has learned the job thoroughly and can work safely and efficiently with only normal supervision.

GROUP PERFORMANCE AND COACH-PUPIL METHODS OF TEACHING

These two methods of instructing require actual practice by the student and are, therefore, of real value where manual skills are involved. Skills are best learned by doing them. Practice makes perfect.

Large groups may be taught by these methods using only one instructor.

A. Coach-Pupil:
   1. Trainees are divided into pairs. Number the students and then pair off the even with the odd.
   2. One piece of equipment or material to each pair. In many cases tables, benches and special training set-ups will be prepared in advance.
   3. Instructor gives complete demonstration. He must be sure all can see and hear, must go slowly and ask and answer questions.
      Repeat demonstration or parts as necessary.
   4. One of the trainees in each pair then tries to do the skill while the other one watches and checks the work. After the first trainee in the pair practices the skill.
   5. Instructor and his assistants (if any) must check each pair of trainees to see that they are doing the skill correctly. This method requires close coordination and cooperation by the trainees.
   6. In some cases the students may be grouped into 3's or 4's especially if there is a shortage of equipment. It is very desirable to have a prepared job sheet or performance check sheet for each trainee to use. Charts showing various steps and key points should be procured or prepared. Examples for Coach-Pupil method are: Rifle and pistol practice, manual of arms, use of hand tools, how to operate certain types of equipment and machinery, code practice, first aid, semaphore practice, sound-powered telephones etc.

B. Group Performance: Each trainee is given needed equipment and/or materials.
   1. Instructor demonstrates at regular speed. Explanations and questions follow. Use the blackboard and other training aids.
   2. Instructor does the job slowly step by step with the trainees likewise doing each step as shown and explained by the instructor. The trainees wait for the instructor to do each step first. Repeat demonstration steps as necessary. In many cases step-by-step charts are available or can be prepared by the instructor. All the students do the job steps at the same time.
   3. Trainees practice the skills, at usual job speed, under supervision. This may be done singly or in many cases group drill is best. Examples for Group Performance are: Tying knots, military drill, manual of arms, identification of parts, planes, ships, flags, symbols, etc.; assembly-disassembly operations, navigation problems, problem-solving work in general, oral practice in learning a new language, swimming etcetera.

INCIDENT PROCESS

a. Each participant is given a brief statement describing an incident of importance in the situation being examined.

b. The group is then given about thirty minutes to ask the instructor (who has much information at his disposal and who is intimately familiar with the situation) any questions which may help them find out as much as possible about the situation.

c. At the completion of the question period each participant analyses the major issues, and proposes a course of action.

d. The ensuing discussion centres around:
   1. importance of information
   2. the problem-solving process
   3. the adequacy of the solution
   4. the importance of the issues and underlying variables.

- group discussions of possible particular relevancy in hospital administration.

ORGANIZATIONAL BEHAVIOR AND ADMINISTRATION

Analysis of cases

In analyzing the cases, include at least the following, wherever applicable:

(1) State precisely the critical issue, or the problem and the subissues. This means that you bring your human relations knowledge and insights (not just "common sense") to bear, in organized fashion, in explaining "what goes on here?", "what is the nature of the problem or problems?" or "why did things happen as they did?". Be sure to state clearly and classify the nature of the problem.

(2) Write a concise analysis of the case, spelling out in organized fashion what caused the problem to occur. Look for symptoms in such terms as the perceptions and goals of key people involved, the formal organization structure, differing values and beliefs, and similar clues to organizational behavior. Do not repeat the facts of the case except as you draw upon them in your analysis. Avoid shallow or sloppy thinking here. Apply what you know about human relations to the specific case in an organized fashion. Use outlines if you like. (The payoff in case study comes from clear analysis.)

(3) Prescribe and justify the steps that should be taken, by whom, and when, in order to lead to a realistic solution of the problem. You may want to classify your solution in terms of what should be done immediately, and what should be done in the long run. Make clear whose role you are adopting, with whom you identify yourself as decision-maker in the case.

In prescribing solutions, be sure your recommendations relate to the problem or problems you defined under (1) and analyzed in (2). Indicate what goals you are accomplishing by the course of action you advocate.

Some Hints on Studying

(1) Small group discussion of these cases and selections, in advance of the class meeting, can be very helpful, and is encouraged. The written reports, however, must be your own in composition and content.

(2) A certain amount of time for reflection and incubation is important in case analysis. Do your initial reading and outline of the cases early in the week, and rework the analysis into final form just prior to the class meeting.

(3) Be prepared to summarize and discuss your analysis in class without reading from your notebook. Assume you are presenting your report to the board of directors or executive committee of your firm, and your reputation (and paycheck) are at stake. Do a professional job.

TRAINING APPLICATIONS OF VIDEOTAPE -- FOUR BROAD CATEGORIES

1. To record in a studio environment
   a. lectures
   b. "how to do it" demonstrations with props
   c. screening and second interviews

2. To record "on location"
   a. spontaneous interaction sessions
   b. plant and company "tours" - orientation
   c. instructor training - micro teaching
   d. on-the-job training and review
   e. team decision-making sessions

3. To playback tapes recorded in other companies or elsewhere -- non professional
   a. familiarization with operations
   b. monitoring of activities

4. To playback specially prepared pre-recorded programs
   a. "packaged professional training courses"
   b. closed circuit commercially sold courses

USE OF ORAL QUESTIONS: Prepare important questions in advance and include them in your lesson plan.

A. Purpose
1. Stimulate interest.
2. Guide the thinking of the trainee.
3. Review and summarize the lesson.
4. Stimulate discussion and keep it on the subject.
5. Discover interest, abilities and knowledge already possessed by the trainee.
6. Help trainee in planning work and analyzing problems.
7. To check effectiveness of instruction.
8. To clarify facts and ideas.
9. To check major points, safety precautions and procedures.

B. Suggestions on manner or technique of asking and answering questions by the instructor.
1. Use words and grammar appropriate to the trainee's understanding.
2. Word the questions so there can be no mistake on the part of the trainee in understanding the meaning.
3. Word questions so they cannot be answered with the words "yes" and "no".
4. Avoid catch or trick questions which rob trainee of confidence in instructor.
5. Limit questions to one main thought.
6. Easy questions may be used to develop confidence in those trainees who have difficulty entering into the discussion.
7. Construct questions that will open up discussion periods and then use follow-up questions in the discussion period to keep trainees on the subject.
8. Call on trainees in all parts of the room.
9. Speak so that all in the room can hear.
10. Avoid monopolizing of discussion by one trainee.
11. Ask questions slowly.
12. If trainee cannot answer question immediately, direct question to another trainee.
13. Call on trainee by name.
14. Avoid a two-way conversation with one trainee.
15. Call on inattentive trainees.
16. Questions must be relevant to subject being discussed.
17. Encourage trainees to ask questions.
18. Do not interrupt trainee during the making of his answer unless there is a long pause.
19. Allow just one trainee at a time to answer.
20. Insist that answers should be spoken loud enough for all in class to hear.
21. If answers are poor, reword the question.
22. Prepare the questions in advance and include in your lesson plan.

C. Procedure for instructor to follow when asking questions of students in a classroom or other group.
1. Ask the question first.
2. Pause briefly.
3. Call on a student.
4. Evaluate and reward answer as necessary to complete or to correct it.

SOME TIPS ON SPEAKING FOR INSTRUCTORS

Some instructors find that although their grasp of the subject matter is excellent, their organization of the lesson material excellent, and their training aids utilization effective, they are still not communicating all that they should to the students. Quite often the fault lies in their speaking techniques. The following tips are useful guides to good speech in the classrooms:

1. Speak as you would talk to a friend. Be conversational.
2. Use simple language. Avoid using too much of the trade lingo.
3. Use short sentences. It is more difficult to carry the thought if long sentences are used.
4. Explain new words. To you they may seem as simple as ABC. To the beginner they may have no meaning whatever.
5. Use occasional humour to hold interest. The only restriction here is that your humourous illustrations must add to and not detract from the lesson. The humour must be related to the subject.
6. Move freely about the front of the room but guard against undesirable nervous habits. There is no objection to the instructor moving about. However, movement without meaning, such as playing with chalk or putting glasses on and off, should be guarded against.
7. Keep eye contact with the men. Look at individuals in the class just as you would look at them during ordinary conversation. Let them feel you are having a friendly conversation.
8. Use questions. Without questions an instructor has no way of knowing if the students are thinking along with him. Prepare questions in advance.
9. Summarize and conduct review discussions. It is difficult to learn much by hearing something only once. Repetition is necessary for effective learning.
10. Be sure everyone can hear you. Raise your voice if necessary. Ask a student in the rear of the class if he can hear you. Shut off noisy motors, etc. If you must speak under noisy conditions use charts, blackboards or overhear projector to list the main ideas. Repeat statements.
11. Avoid talking too fast and running the words together.
12. Use conventional gestures frequently, but only when appropriate to the subject.
13. Keep the talking period short - 10 to 15 minutes at a time or less. Have something else to draw their interest after a few minutes of speaking, then continue.
14. Be enthusiastic, believe what you say. This is reflected in your voice and helps direct student attention to what you are saying.

INSTRUCTOR ATTRIBUTES: GOOD AND BAD

The attributes of an instructor that students seem to respond to most often and most favourably are as follows, and these are not in any order of priority and obviously do relate and overlap.

a. Knows the subject, organizes it well, presents it interestingly, and evaluates fairly.
b. Is enthusiastic, stimulating, dynamic, and encouraging.
c. Understand students, involves them thoughtfully in class discussions, evidences an interest in the individual and his opinion, and takes time to help students, both in class and out.
d. Has a good sense of humour, creates an encouraging classroom atmosphere characterized by permissiveness and motivation.
e. Offers good practical suggestions and illustrations, applies theory well, relates principles and practice.
f. Is himself an example of good teaching, practices what he preaches, sets an example as a person of ideas and ideals.

The unfavourable attributes reported most frequently and most strongly (but not very often) were as follows:

a. Course is disorganized, lacks in substance and/or is repetitious, instructor talks off the cuff without adequate preparation, tells us what to do but doesn't do it himself, makes assignments that are not clear or or indefinite.
b. Poor evaluative practices: bad questions, directions not clear, poor criteria for grading; fails to hand back tests or to discuss them with the students.
c. Unfruitful group discussion characterized by lack of organization, usurpation of class time by individuals or for irrelevant discussion; instructor not really giving very much of himself to the course.
d. Sarcasm, caustic criticism, failure to appreciate the students' point of view.

CHAPTER 4: MOTIVATION

Maintaining a voluntary workforce is a crucial part of the volunteer coordinator's job. Volunteers have needs, desires, and expectations which must be met by the program in which they are involved.

Week 6 - Motivation

Topic 1 - Basic Motivational Theory

- Very elemental
- How motivation is viewed by theorists and by participants.

Topic 2 - Motivation and the Volunteer

- Spotlight on how one motivates members in an organization who are serving on a volunteer basis.
- Is the job intrinsically satisfying.
- How to stimulate and maintain the volunteer's interest in a position.

Topic 3 - Maintaining Motivation

- The emphasis should be on personal contact between supervisors and volunteers.
- The need for giving recognition to volunteers performing well. What forms that recognition should take. What sort of incentives can be used.

RESOURCE PERSON

College professor preferably.

READINGS

Core Readings

*1. Abrahamson, J., "Who Volunteers? and Why?", Adult Leadership, 1954, 3, 14-16.
2. Blumberg, A. and Arsenian, S., "A Deeper Look at Volunteers: What Motivates These Important People", Adult Leadership, June 1960, 9, 11.

Supplementary Readings

1. Riessman, F., "The 'Helper' Therapy Principle", Social Work, 1965, 10(2), 27-32.
2. Cahoon, A.R. and M.J. Epstein, "Performance Appraisal in Management by Objectives", Studies in Personnel Psychology, 1972, 4(2), 35-44.
3. Knowles, M.S., "Motivation in Volunteerism: Synopsis of a Theory", Journal of Voluntary Action Research, 1971, 1(2), 27-29.
4. Anderson, John C. and Larry F. Moore, "The Motivation to Volunteer", Occasional Paper Series, Voluntary Action Resource Center, Volunteer Bureau of Greater Vancouver, 1975.

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* included in Book of Readings

RELEVANT EXERCISES

FROM PART II

Exercise 1

CHAPTER 5: FUNDING

Two issues of concern to many voluntary programs are:
(1) obtaining initial "start-up" funds for their programs;
(2) obtaining stable, continuous funding once the program is established.

This subject is proposed as the topic for Week 7. However, as a cautionary note, in the courses which we presented, this topic was found to be of somewhat limited interest. For those volunteer coordinators who are concerned with funding, it is a vital topic and one which should not be omitted from a training course such as this. We recommend that the participants' reactions to this session be determined at the initial meeting and if their interests do not lie in this area, substitute a topic of more immediate concern to them. (NOTE: If a minority of participants are interested in the topic, but it is decided not to hold a session on this subject, the written materials included as Handouts could be useful).

Week 7 - Funding

Topic 1 - Sources of Funding

- Identification of potential funding sources
- How to make initial approaches to funding bodies

Topic 2 - Applicantions for Funds

- A "how-to" approach to the writing of briefs
- presentation of briefs
- need for salesmanship

RESOURCE PERSON

Teacher of business english who is experienced in preparation and presentation of briefs or a skilled volunteer coordinator or community leader skilled in presentation of briefs or staff person from a funding body.

READINGS

1. MacRae, R.H., "Guidelines for Developing Applications for Foundation Grants", Proceedings, AVBA, National Conference on Social Welfare, Chicago, May 30-June 4, 1970, p. 42-45.

HANDOUTS

1. Funding Sources; Writing and Presentation of Briefs

RELEVANT EXERCISES

FROM PART II

Exercise 6

FUNDING SOURCES; WRITING AND PRESENTATION OF BRIEFS

Gail Doran
Dept. of Secretary of State
(Citizenship Development)
Vancouver, B.C.

I. BASICS

A. A group should carefully review their present position before applying for funding from any source. Once the information listed below is assembled, much of the legwork of writing briefs has already been accomplished.

1) Financial position for the current year
   - source of funds or OTHER SUPPORT projected expenses.
2) A brief history of the group and/or particular project.
3) Constitution if the group is a formal body OR, if not, statement of objectives.
4) A summary of your proposed project or current operations.
5) A budget for this project/operation.
6) Copies of any studies or evaluation reports which have been completed OR statistical/descriptive reviews of activity.

Evaluation Research and Citizen Groups - copies of this paper have been circulated this evening.

A small amount of time spent on documenting your activities and arranging to reread this material periodically (monthly) will be worthwhile. As well as giving you a perspective on what you have accomplished, it will save the group time when reports or funding applications must be prepared.

Remember that information you collect should be used in two ways:

a) For the group - a frank appraisal of aims, assumptions, progress and internal difficulties.
b) For funding bodies.

A potential funding body may not emphasize the same points as the group does. The funding body has its own aims and priorities and may fund those groups whose aims coincide with their aims.

B. General Questions:

1) What do you want the funds for?
   - Community service project
   - Self-help project
   - Sharing knowledge or experience
   - etc.
2) Are there other groups with similar aims within the municipality, province or country?
   - Have you had contact with these groups?
   - Is there a federation or parent body who might support your project?
   - Where do similar groups obtain their funding?

3) Is there a government body or private organization that you feel is responsible for providing the type of service your group offers? (EXAMPLE: Information centres receive assistance from United Way funds, private societies, B.C. Dept. of Human Resources, Information Canada and Canada Dept. of the Secretary of State. While your group is interested in obtaining funds for a project NOW, perhaps you should also begin to think of courses to pursue in the future.)

C. Potential Funding Sources

Identify a wide range of private and governmental sources.

Several lists of foundations and government departments have been assembled. By going through these lists you can select sources which seem applicable to your purposes:

1) Funding Sources Guide - printed by Union of B.C. Indian Chiefs and Secretary of State. A copy is available, for office use only, at 1525 W. 8th Ave., (2nd. Floor), Vancouver.
2) Resource Exchange Project (P.O. Box 195, Victoria, 382-9898). The REP library list includes several essays on where and how to apply for money. REP is an exchange medium - let them know what your group is doing when you request information.
3) Misgivings - (Publisher: memo from Turner) copies are available in public libraries.

Your community probably contains several service clubs or altruistic groups - Rotarians, Kinsmen, fraternal clubs, etc. Small or large business concerns should be considered also. Their public image can be enhanced by a donation of goods, services or money to your group.

Another source of information is the MLA or MP responsible for your area. If you have not been able to locate an appropriate government department with a granting program, write to your MLA or MP and ask for his/her guidance.

II. WHO TO APPROACH

Looking for money can dissipate a lot of group energy. There are preliminary steps you can take to use your time constructively.

1) Prepare a list of the bodies you think may help you.
2) Write or telephone each of these bodies
   - briefly describe your project (2 paragraphs)
   - ask for a statement of their objectives
   - ask for an application form
   - ask if they have staff people to help you with the application procedure
   - ask what conditions accompany grants.
3) Money usually has strings attached. At this point your group should consider if (and how) a grant from a certain body will affect your aims and activities. Can you accept and comply with restrictions or requirements?
4) Decide which sources your group is willing to pursue.

III. WRITING BRIEFS

(or filling in forms)

A. Does the foundation/government department have its own application form? If so, USE IT! You may wish to prepare a more detailed brief and attach it to the application form. A sample application form (Secretary of State) has been distributed and we can review it after the next section.

B. If the foundation/government department does not have its own application form, you may consider using the following model and modify it to meet your needs.

1. CAREFULLY READ THE CRITERIA OF THE FUNDING BODY
2. First Page: Project Title
   Sponsoring Group - names, addresses & telephone numbers of 2 contact people
3. Title Page:
   - Short paragraph with purpose of project
   - Amount requested $__________
   - Time period covered: MONTH/YEAR to MONTH/YEAR
4. A page which will give the TABLE OF CONTENTS, list each section of your brief.
5. Introduction
   a) A brief history of how the group/project started.
      Insert supporting, or detailed, material as appendices, i.e., background material on the Society, or a copy of Constitution, list of members, etc.
   b) What your project is now doing - mention present and past sources of funds or support. Put a detailed budget in as appendix if you wish.
   c) Future plans - What does your group plan to do after this funding ends? Any 5 or 10 year plans, hopes?
6. Operation of Group/Project
   Aims and Assumptions
   Why are you engaged in this activity?
   How does your project fit criteria of funding body?
   Benefits of project
   - to the participants
   - to the community
   - to the funding body.
7. Support Requested
   AMOUNT $____________ TIME PERIOD ____________________ TO ______________
   Itemize how you will spend this money.

	MONTHLY	YEARLY
rent, light, hear, telephone		
salaries (X staff, full or part time)		
supplies		
equipment		
travel		
honoraria		
special expenses (i.e., babysitters, costumes, training sessions, etc.)		

8. Your Resources
   In this section you should illustrate your group's commitment to the project:
   a) donated space or supplies;
   b) volunteer time involved;
   c) any services you have "scrounged" (i.e., free air time, newspaper space, architectural services).

9. Anticipated Support
List other bodies you are applying to for funds and indicate what you will use those funds for.

*Points 7,8,9: depending upon the nature of your project, you may wish to condense all this information into one table.

Example:

Budget Items For One Year	Dept. of Sec. State	Dept. Human Resources	Your Group	Total
rent			$2,400.	$ 2,400.
supplies	$1,200.			1,200.
salaries				
1 coordinator		$10,000.		10,000.
2 part-time staff		8,000.		8,000.
24 volunteers			donated	N/A
telephone	240.			240.
travel			300.	300.
equipment			500.	500.
	$1,440.	$18,000.	$3,200.	$22,640.

10. Other groups supporting the project
   a) List those groups who support your application
   b) List those groups who are willing to work with you on the project
   c) List those groups who have successfully carried out similar projects in other communities and with whom you have been in contact.

   Be careful to indicate how each group listed is involved.
   Be careful to check with each group before listing them.
   Their support must be recent.

11. Appendices
   This is the place to put most detailed information - it is easily available and does not clutter up the application.

IV. PRESENTING BRIEFS

If you have an opportunity to formally present your application/brief to the funding body:

- Invite them to meet at your project headquarters (if feasible);
- Choose your representation carefully, they should reflect the composition of your group. DO NOT send one or two staff members - board and volunteers should be involved.
- Two or three people should give a spoken summary of the brief (rehearsal is good). Try not to read the brief.
- Take enough copies of your brief with you - one for each person involved in the meeting.
- Bury your internal differences and present a united front.
- Respond to questions without getting bogged down in details.
- Decide beforehand what main points you want to stress and bring these up when the discussion goes in that direction (or steer the conversation in that direction).

V. APPEALS

Your request for funding may be rejected.

1. Find out why your application was rejected.
2. Find out if you can modify your request to make it acceptable.
3. Use any appeal routes available.

Every funding body receives more applications than they can fund. A rejection does NOT mean that your project is worthless.

CHAPTER 6: PUBLIC RELATIONS AND RELATIONS WITHIN THE ORGANIZATION

For volunteer coordinators "public relations" in the broad sense of the word, involves many aspects of meeting and dealing with people in the carrying out of everyday duties. Public relations practices are used in recruiting volunteers, dealing within the organization, informing the public about the agency and in every day contacts.

This topic is one of the subjects of Week 8. In our experiences the section dealing with the use of the media was best if the discussion remained on a very practical level dealing with public relation ideas which were realistically available to the volunteer co-ordinator, rather than on techniques for dealing with city-wide newspapers or television stations as these were not very accessible to the co-ordinators.

A great deal of interest was expressed throughout our sessions regarding the use of video-tape, both as a public relations tool, and as a technique for training and orientation of volunteers. If you have access to such equipment and a person skilled in their use, you may wish to consider designing a specific session on this topic.

Week 8 - Public Relations

Topic 1 - Public Relations Techniques

- including: community newspapers, speaking engagements, kiosques in shopping centers, slides, video-tape-recording equipment

Topic 2 - Public Relations within the Organization

- Relations with the Board of Directors
- Volunteer / staff relations

RESOURCE PERSON

A public relations officer for a firm or agency-association or a skilled volunteer coordinator who has shown an aptitude for dealing with his agency's Board of Directors.

READINGS

Core Readings

*1. Hamilton, J., "Publicity and Public Relations", paper presented at the Northwest Regional Volunteer Leadership Workshop and published as a Technical Report by the Washington State Office of Volunteer Programs, 1972.

*2. Senor, J.M., "Another Look at the Executive Board Relationship", Social Work, 1963, (April), 19-25.

*3. Magoon, E., Volunteer-Staff Relationships: A Team Approach, Olympia, Washington, Washington State Office Programs, 1972.

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* included in Book of Readings

4. Canton, Elizabeth M. and Margaret R. Pepper, "What About the Staff?", Voluntary Action Leadership, Spring, 1975.
5. Kramer, Ralph, "Ideology, Status and Power in Board - Executive Relationships", Social Work, October, 1965, p. 107-114.

HANDOUTS

Orienting Staff to Volunteers

RELEVANT EXERCISES
FROM PART II

Exercises 2 and 13 (External Public Relations)
Exercises 4, 12 and 15 (Volunteer/Staff Relations and Board Relations)

ORIENTING STAFF TO VOLUNTEERS

by

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November, 1972

(EDITORS' NOTE: This is an exerpt of the first three chapters of a nine chapter Guidebook on "Orienting Staff to Volunteers".)

Section 1

Introduction: The Need, the Team, the Targets and the Teachers

A. THE NEED FOR A TEAM

A good volunteer program needs a successful partnership between regular staff and volunteers with understanding and acceptance on both sides. Most criminal justice agencies do the training job with volunteers. Not 1% do it with staff, though it's needed there, just as much, for nothing in the previous professional training of most staff has prepared them for understanding volunteers. In fact, their background is often naturally biased against volunteers.

So while we've been looking the other way, training volunteers for their work with staff, we've missed an equally important need: training staff for volunteers.

The target of training here is not volunteer coordinators, per se. Training for them is covered in the Center's Preliminary Report #1, and Frontier 3, and in area meetings of volunteer coordinators. Rather, the trainee is staff who do not primarily run the volunteer program, but have some significant contact with it, or could, if they understood it better. Perhaps they supervise a few volunteers. Basically then, we're talking about line staff other than the Director of Volunteer Programs. To a certain extent we also include supervisory staff and top decision makers as well, but there are differences which will be indicated throughout, and a separate section will be devoted to top management (Section VII).

The objective of this training is the formation of a positive partnership between line staff and volunteers. We must stop the pendulum which historically in corrections has swung at first from all volunteer personnel, then to all paid personnel, but never yet a team. As Ira Schwartz has said, "The most effective relationship between volunteers and staff is one that emphasizes the team approach."*

Since we're talking about teamwork between volunteers and staff, we're talking about training both members of the team. Would it make sense to train one astronaut for a link-up in space and not the other one? It makes just as much sense to orient volunteers without orienting staff.

There is clear evidence of gross neglect in training the staff part of the team. In 1972, our Center conducted a national survey of 500 representative volunteer programs in the criminal justice system. The consensus of this and other recent surveys is that volunteers receive some kind of orientation in well over 90% of these programs. But to our knowledge only 4 or 5 criminal justice agencies in the entire nation systematically orient their staff to volunteers.

We believe this imbalance is seriously hurting the volunteer movement because it leads to staff resistance and misunderstanding and this is the principal block to the healthy growth of volunteer programs today.

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*Unless otherwise noted, all quotations are from the 1971-72 "Volunteer Courts Newsletter" series on "Training Staff for Volunteers."

Let us establish this point, first by reference to reason and rationale, then by evidence from consultants, line staff themselves, and volunteer coordinators.

B. WHY STAFF ORIENTATION IS NEEDED: VOLUNTEERS, CONSULTANTS, LINE STAFF, AND COORDINATORS

1. Volunteers

Staff training for volunteers is necessary because of the nature of volunteer work itself. The volunteer is unpaid - in money. Therefore his rewards in personal satisfaction are even more important to the volunteer. This "motivational pay check" comes from two principal sources: from the client, in being well matched with him, and from the paid staff person(s) with whom the volunteer works. As regards the latter, indifference or mere tolerance is not enough. Active support and approval is needed. Volunteers won't work for people who merely tolerate them, certainly not for those who resent them.

That the volunteer today is not generally getting such support, that he is being psychologically underpaid, is suggested by some results on the national survey referred to above:* First, the fact that the national average in volunteer turnover rate is 50% yearly. Secondly, the fact that 15-20% of the volunteer program starts in the past two years have failed outright while many of the survivors are token programs.

Some of this certainly stems from poor volunteer program administration generally. But inadequate staff acceptance and support surely accounts for much of it, too, and this will be documented later in this manual.

2. State and National Consultants

Moving on from the volunteer's viewpoint, we see that there is also considerable agreement on the need for staff training from those actually engaged in implementing volunteer programs at a supervisory level. Mr. Hugh Brown, State Supervisor of Volunteers in Georgia, puts it this way:

> "You cannot organize and operate a sound statewide volunteer program in a central office alone. The success or failure of a volunteer program also rests on the shoulders of the field staff.
>
> "In the beginning of our statewide volunteer program we had support from our Governor, our Parole Board and our Administrative Staff. We did not know, nor did we consider, the feeling of our Field Staff in using volunteers in parole. This was a mistake that we have not completely overcome yet but we are doing something about it. From this mistake we learned one important thing. Trained Field Staff in the use of volunteers is as important as trained volunteers in parole.
>
> "The quicker the parole supervisor's attitude and thinking change toward volunteers, the quicker a volunteer program will start moving forward. It is important that more emphasis be put on training field staff in the use of volunteers in the beginning of a volunteer program rather than on training volunteers.
>
> "Parole supervisors are professionals but sometimes professionals are reluctant to accept change or see the need for change in order to do a better job in their profession. Time and money spent in training field staff in the use of volunteers is an in-

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*Section I of the book, "Guidelines and Standards for the Use of Volunteers in Correctional Settings, "Ivan Scheier, Judity Berry et al. Expected to be published in late 1972 or early 1973 by the U.S. Department of Justice, Law Enforcement Assistance Administration.

vestment that will better than pay for itself in dividends. The better field staff is trained in using volunteers, the less volunteers will need training in working with field staff in a team effort to assist parolees. In order for a volunteer program to be successful it is very important that field staff be trained in the use of volunteers and are willing to accept their help."

Our experience at the National Information Center strongly supports Mr. Brown's assessment of the situation. Our Center's staff now conducts approximately 60 on-site consultations or workshop presentations yearly, and is visited by an additional 500 persons or groups for consultation at the Center. In at least three-quarters of these consultations, staff relationship to volunteers has been one of the two or three primary issues raised by consultees.

3. Line Staff

Current staff attitudes towards volunteer programs tend to be in the merely "satisfactory" range. This is confirmed by the previously mentioned national survey, the Joint Commissions' study, Leonard Flynn's survey in Florida, Leonard Pinto's study in Colorado, and several others. These studies are summarized in the Publication "Volunteers in the Correctional Spectrum: An Overview of Evaluation, Research, and Surveys," by Dr. Ernest L.V. Shelley, available from the Center at three dollars a copy. Unless otherwise noted, all research references subsequently described in this manual are summarized in the above overview.

In the most recent national survey, referred to previously, only 52% of staff were felt "satisfactorily" to accept and understand volunteer programs in their agency. Satisfactory is far from "excellent" of course, and presumably the results would be even less encouraging where no volunteer program currently existed in the agency.

Again, satisfactory isn't enough, if we are correct in believing that volunteers need to be paid in positive acceptance and support by staff, rather that mere tolerance.

When you get beyond structured surveys and questionnaires, to situations in which staff can let their hair down, such as workshops and interviews, staff reactions are even more alarming. Thus in the San Diego report attached to this publication we find, describing staff reaction, terms such as "apathy," "cynicism," "simply ignore" the program. Similar kinds of reactions arose in another study, "Professionals Eye Volunteers, A Look at the System."*

Sometimes indirect evidence is even more revealing than direct. The Center's recent national survey included questions on line staff reactions to volunteer programs, in terms of the principal problem areas they saw, among a choice of 17. The results reveal that staff were primarily interested in fewer better volunteers, tighter screening, rather than in taking responsibility for improving quality of the program via their own efforts in providing better supervision, training, creative ideas for new programs, etc. In other words their general viewpoint was: be more restrictive at the gate and less involved inside the gate. Staff's principal reasons for disliking volunteer programs were that they produced a lowering of offender control and accountability.

*This study is abstracted in the previously cited research and evaluation overview publication. It appears in full as Report XIII in the book "Volunteer Training for Courts and Corrections," by Jorgensen and Scheier, to be published in early 1973 by the Scarecrow Press, P.O. Box 656, Metuchen, New Jersey. See also Report XIV in that book.

Therefore, as the survey concludes: "In general staff would appear strongly to prefer better control of the existing program, rather than enlarging or diversifying it." All this hardly constitutes a positive attitude towards volunteer programs.

Sheer ignorance is a significant symptom, too. The Hennepin County Juvenile Court volunteer program is one of the model programs in the nation, well-conceived and managed. Yet, several years after its inception, a survey of line staff revealed that 70-80% felt they did not completely understand their role expectations as supervisors of volunteers, and needed further training in order to supervise volunteers effectively. A similar percentage of volunteers, independently surveyed, agreed with them.*

Whether lack of knowledge leads to lack of commitment or vice versa, is not the point. The point is, the results showed staff training in the use of volunteers as clearly necessary for effective work with volunteers, <u>so clearly that Hennepin County made it mandatory, on the basis of these results</u>.

4. <u>Volunteer Coordinators</u>

These are the people at the very center of the volunteer program communication system in close contact alike with volunteers, staff, and sometimes clients and top management as well. They should know, and here's what they say.

a. In two recent national surveys only 1 or 2% of coordinators felt that their programs could not be improved.

b. One of these surveys asked volunteer coordinators to rate the area in which they most needed help from, among six significant options.

At the very top of the list was "material or suggestions for orienting staff to volunteers." Moreover, this was mentioned as a problem area by two-thirds (67%) of the 500 volunteer coordinators surveyed. While "Guidelines for Program Management" was a close second, this is a very general catch-all category which could include orienting staff as well as many other program management areas.

C. <u>WHERE STAFF ORIENTATION MAY NOT BE NEEDED SO MUCH</u>

In some cases staff acceptance of volunteers has not been a problem or a primary problem. We should be clear about these cases, too. We have enough real challenges in developing quality volunteer programs, without looking for problems that don't exist.

There are five instances in which staff acceptance of volunteers may not be a primary problem.

1. The obvious case, where you have in fact tested out staff attitudes and support of volunteers and find these positive. Please note: we did not say you could <u>assume</u> this from superficial responses or simply by looking the other way. It must be probed for, evaluated carefully, confirmed and re-confirmed. If the staff acceptance situation is good today, that does not mean it will be good tomorrow. Good staff-volunteer relationships require constant working at, just as do good relationships in a marriage.

2. Where the leaders of volunteer programs are themselves volunteers. Clearly, this tends to reduce distance and alienation between "staff" and volunteers. On the other hand, a large part of the distance can come from the difference in leadership vs. follower roles, rather than paid vs. unpaid status, and we know of some instances where leadership volunteers are as alienated from their rank-and-file volunteers, as are paid staff.

*A more complete resume of this study appeared in the 1972 Volunteer Courts Newsletter.

Moreover, this model tends to "solve" the partnership problem by removing one of the partners: paid staff. This gets us back into the regretable consequences of either volunteers or staff trying to go it alone, when historically each alone has failed in corrections.

3. Where the only paid staff in the agency owe their jobs to volunteers; that is, paid volunteer coordinators are the only staff in the agency, and their sole (or major) job is the leadership of volunteer programs. This is indeed a most favorable circumstance, if relatively rare, but it is still subject to the kinds of cautions described above: leadership-follower alienation due to the difference of these two roles, plus avoidance of the positive potential of a general staff-volunteer partnership. It also makes the restrictive assumption that there is no role for professionals except in the supervision of volunteers.

4. The "Enclave" Model. Here, the volunteer coordinator essentially supervises the entire work sector in which volunteers operate, e.g. he has primary responsibility for a geographical or functional work sector in an institution, and/or ultimate responsibility for all clients with whom volunteers work. In other words, from being simply the administrator and facilitator of the volunteer program in general, he becomes a caseworker or case supervisor who happens to work with volunteers.

In the short-term this is less threatening to other line staff. The volunteer coordinator-case supervisor takes responsibility for clients or tasks with which volunteers are involved. If anything goes wrong, it's the volunteer coordinator's problem, not staff's. The time and inconvenience and role change adjustments attendant on working with volunteers are the coordinator's worry, not staff's. Staff can go on as before, in comfortable isolation from volunteers. Staff are more or less allowed to pretend that volunteers do not exist.

But there is some cost or trade-off in thus avoiding "confrontation" between volunteers and staff-at-large. (a) As before noted, all the potential of a broadly active staff-volunteer partnership is abdicated. (b) Unless some special initiatives can be taken to increase the volunteer coordinator staff, the volunteer program is likely to remain small and token, limited by the fact that there are only one or two volunteer coordinators. Indeed, since this enclave situation tends in the first place to reflect an agency's unwillingness to take serious staff responsibility for its volunteer program, this smallness is likely to continue. (c) Even the enclave situation can't entirely protect volunteers from criticism-at-a-distance by staff, or vice versa. And the very lack of communication may well inflate objectively minor concerns to major ones, as isolation breeds paranoia.

5. The Independent Auxiliary. This is essentially an enclave program raised to another power; that is, not even administratively sited within the agency, but independent and free-standing, often as a private organization.

This model thus has the same kinds of advantages and disadvantages as the enclave model, again raised to a higher power, e.g. confrontation is far less likely, but so is communication and staff responsibility.

We do not entirely reject these models. Indeed, the independent auxiliary and enclave models are a realistic fallback position if agency staff strongly resists the best attempts to convince them of the value of volunteers. These models then allow you at least to involve volunteers in some way with clients or the agency's other work. And from the enclave model, especially, there is an opportunity for slow spreading of staff involvement, if the volunteer coordinator is alert and receptive to identify, orient and involve in volunteer supervision, staff who eventually indicate interest in the program.

The enclave and independent auxiliary models are thus to be considered fallback strategies for involving volunteers, if all else fails in convincing staff. We suggest only that "all else" should be tried first, as suggested in the remainder of this publication.

D. THE PROSPECTS: CAN STAFF ORIENTATION SUCCEED?

Even with all the above possible exceptions we still believe staff-volunteer relations frequently are, or should be, a crucial problem. The question then is: Can a program of staff training for volunteers do anything to address the staff-volunteer problem situation?

1. Hennepin County believes their staff training program has indeed done so, and they are analyzing some attitude data in that regard.

2. Mr. Hugh Brown of Georgia seems to believe similarly from his statewide experience, thus:

> "We are now in the process of conducting regional workshops for parole supervisors in the use of volunteers. We include our volunteer program in our statewide workshops and seminars. Our parole supervisors now participate in training volunteers as well as recruiting and screening.
>
> 'I don't have time to use volunteers,' 'I don't want volunteers messing up my parolees,' 'Volunteers will take over our jobs,' were often heard remarks in the field several months ago. Now we are beginning to hear 'I need more volunteers,' 'Let's have a training session for my volunteers,' 'I'll match my volunteers with any other district's volunteers.' It makes a difference when parole supervisors want help from volunteers in working with parolees."

3. It was the appreciation of the conveners of the San Diego staff and trainees that their staff training workshop changed staff attitudes towards volunteers positively (See Section VIII).

Since these three programs represent essentially a majority of known systematic efforts at staff orientation, their optomistic consensus on impact becomes impressive. Moreover, since these were pioneering efforts, we can expect with experience even more impact in the future.

But we certainly need more data, and harder data on the impact of staff orientation to volunteers on staff. Researchers please note.

E. WHO IS RESPONSIBLE FOR STAFF ORIENTATION TO VOLUNTEERS?

Staff resistance to volunteer programs is real, and not rare. However, this is not primarily in indictment of staff. It is the primary responsibility of the volunteer coordinator to initiate and organize the program for orientation of staff to volunteers. It is the associated responsibility of top management to make time and resources freely available for this effort (See Section VII). The actual "faculty" for the training includes the volunteer coordinator, staff who are experienced in the use of volunteers, some veteran volunteers, and staff trainees themselves, who must be given every opportunity to participate actively with questions, ventilation of anxieties, etc. Since communication is a major problem, outside experts on communication and training are a highly desirable addition (See Section VII). Moreover, outside experts have a general value. Just because they are outsiders they can sometimes say things insiders cannot, as staff or volunteers. And we have all seen how the presence of a third person will sometimes catalyze discussion through that person, between two people who weren't talking before.

In a wider sense we are all responsible, not just for our own staff but for helping generally with other staff, line or top. This is especially so of state coordinators or anyone who has an opportunity to come before a state, regional or national audience.

Gordon Bates summarizes strategies here as follows, especially working region wide.

"1. Write about the volunteer movement - get it down on paper where others can read it and respond.
2. Keep in touch with key people within the departments with whom you want to work.
3. Establish committees, or get on committees within the professional associations of your state which have as at least part of their focus the use of volunteers.
4. Cultivate support outside the criminal justice field within institutions or groups who may be able to act as catalysts for the volunteer movement.
5. Get on professional programs to make presentations on volunteers.
6. Wherever possible let volunteer programs grow out of needs as staff sees them - so they have a stake in the program. It goes back to the old adage, that if you help probation departments where they think they need help, they'll be more apt to help you where you think they need help.
7. Perhaps the most basic strategy of all that none of us should forget, is to make certain that any program which is attempted is a success. Nothing fails like failure and nothing succeeds like success. I have found that a well-run program can tolerate an amazing amount of theoretical failure in terms of goals achieved, whereas a poorly run program may be sunk by the first mistake it makes."

Section II

General Objectives and Strategies

The treatment begins now at a general level, then moves progressively towards specifics in the remainder of this manual.

A. OBJECTIVES IN STAFF ORIENTATION TO VOLUNTEERS

1. To develop staff understanding of volunteer programs, and through understanding, commitment to and active support of volunteer programs.

2. To encourage staff to take serious personal and professional responsibility for the success of volunteer programs, and to derive satisfaction from these responsibilities.

3. Between staff and volunteers, what is sought is not just a truce but a team, not just an armistice but an alliance, not merely tolerance enough for a stand-off, but commitment enough for a positive partnership.

4. The goal is attitude changes associated with information gain. The two are related, of course, but our strategies will emphasize the deep-rooted emotional bases of prevailing staff attitudes, and thus result in something which is a far cry from formal classroom learning. This is not a purely intellectual exercise. There is no real possibility of staff training until there is enough staff interest to ensure the commitment to learning. No amount of gimmickry can substitute for that.

5. We are seeking changes in ourselves as well as staff. We must first understand ourselves as vol teers and volunteer coordinators, if we are to understand staff. For example, we must accept the possibility that some of the hostility of staff to volunteers may be a response to the hostility of volunteers or volunteer coordinators to staff, latent or overt; and that some of staff fears about volunteers are not "neurotic" but depend directly on the quality of our volunteer program.

Nor should we assume that right is always on our side, hence that the other side must be made to see things entirely our way. Rather, we seek a process of negotiation in which both sides may have to give a little in return for real benefits later.

Indeed, the volunteer program which is run so that it reasonably pleases staff must often sacrifice in the process the perfect pleasing of volunteers and the volunteer coordinator.

B. TEN STRATEGIES

1. Run a good program, a quality program, even if at first it is not a big program. The best sales pitch is the quality of the product, and we should concentrate on that rather than on a gimmicky sales pitch for an inferior product.
2. Respect and empathy for the people you're trying to persuade. If you come on consciously or unconsciously hostile, talking about those "cold" professionals, belittling their skills, do you really expect to be listened to?
3. Selectivity. If there's more than one staff "gatekeeper", don't try to convince everyone at first. Far better to assign 50 volunteers, 10 to each of 5 naturally receptive staff members, then 2 each to 25 staff members, including a majority of indifferent or hostile staff people. So identify the naturally receptive staff people first and orient them to volunteers. Don't hardsell or force the others; let them sell themselves in time by observing the successful experiences receptive staff is having with volunteers. This is a process of consultation and persuasion, not manipulation and mandate.
4. Mutual identification. Try to arrange discussion, role plays and other experiences so that staff will be able to identify with the volunteer, not as the man from Mars, but as the man next door (and even the man next door to the man next door). Reciprocally, train volunteers to empathize more with staff aspirations and problems.
5. Information. Principally data on the history of volunteerism, the roles of volunteers in relation to staff, and of staff in relation to volunteers, the positive impact of well-run volunteer programs on clients, staff and the community (See Section VI.).
6. Involvement. Involve staff in all phases of volunteer program planning and operation: recruiting, screening, training, evaluation, etc. (See Section V).
7. Incentive sharing. Be sure staff gets to share fully in the rewards of volunteer programs.
8. Ventilation. Give staff full opportunity to ventilate their concerns, without fear of retaliation and with rational and sympathetic consideration given to these concerns (Section IV).
9. Continuation. Staff "Orientation" is a misnomer, implying an effort limited to defined time segments. By contrast, our efforts must be continuous, preferably to begin well before the first volunteer appears on the scene, and never to relax thereafter, permeating all phases of the volunteer program process. As in marriage no good relationship can ever be presumed permanent. It requires constant working at, constant contact and re-negotiation.
10. Negotiation, consultation, reconciliation. We do not consider our approach in any primary sense a "power play"; indeed, as it becomes a power struggle, we have failed. Rather we are seeking to persuade staff, on reasonable grounds, to support a program which we genuinely believe to be in their best interests, as well as the interests of clients and volunteers. "Don't tell - ask," says Margaret Nalos in her Seattle staff orientation work-up, and we would add, "Don't talk - listen to staff, always addressing honestly their concerns, taking action wherever possible on their suggestions as potential partners in our program." In so doing, we will be especially alert to reconciliation between the goals of our program, the goals of the agency, and the personal and professional goals of staff.

Anyone who would still like to ram a volunteer program through over staff's dead body, if necessary, should ponder this. Staff are still the gatekeepers to the clients we want to connect with volunteers. Somewhere between the top and the line they can easily circumvent or water down instructions to begin a volunteer program, especially since there are always a host of crash priorities laid on them. Nor need they always resort, consciously or unconsciously, to indirection. The rise of professional associations and more recently actual unions of professionals means that if you're foolish enough to try to apply raw power to staff, they can apply plenty of raw power right back at you.
In the past year, the most searching questions put to the author about volunteer programs have come from these two sources, particularly in regard to the job threat they regard as posed by volunteers.

This means more than ever that our orientation of staff to volunteers must have a well-developed basis in reason and evidence. Those who continue to come on with "like it or lump it" are going to take some lumps.

All that follows in this manual is in the spirit of these ten strategies, fleshing them out with more detail.

Section III

Understanding Staff as People: Six Fears About Volunteers

A. THINKING ABOUT STAFF

Recently, we were talking with a friend. Through ability and dedication, she had moved in a few years from the role of volunteer, to local volunteer coordinator, to regional field consultant for a major statewide volunteer organization. She said: "You know, I used to think mainly about volunteers, as people and as workers. Then I thought a lot about the volunteer coordinator's role. Today I find myself thinking more and more about staff, trying to put myself in their shoes, see things from their perspective, as people and as professionals."

She's right. Today staff are the key people in the success or failure of volunteer programs.

This section is simply thinking about staff. It insists that we educate ourselves about the people we will be trying to persuade. For our persuasion must address their concerns and insecurities. Many of these will be quite realistic. All of them will be real.

Once these are understood, our concern must be to reassure staff where reassurance is realistically possible, and openly concede problems where they do exist as a shared challenge. Thereby we can convert fears that volunteers are punishing to reasonable hopes of volunteers as rewarding.

We will describe staff motivations as "the six fears about volunteers." However, many of these fears have an entirely legitimate basis, especially when one considers that most staff have never been prepared in their training to accept and understand volunteers. In fact, there is a powerful anti-volunteer undertone in much of professional training today.

So we must approach staff not to manipulate them, but as honest and sympathetic discussants; not under the assumption that their concerns are invalid, the results of their hang-ups, but that they often are valid and the result of our hang-ups; not as targets but as human beings; not as the enemy or "they", but as someone who can be part of a new "we".

Above all we must approach staff with respect. How can we expect to convince people we neither understand or respect? Indeed, this is just what we have complained about in regard to staff attitudes towards volunteers.

What follows is in that spirit of building mutual understanding and hostility on both sides.

For those who may still favor a slick manipulative approach to staff, without real respect, a reminder: Criminal justice system staff are particularly skilled at penetrating this "disguise," by virtue of the clientele they work with.

B. SIX STAFF FEARS ABOUT VOLUNTEERS

Concern for the Client

1. Staff may well be worried that volunteers simply will not be effective with clients, or may actually harm them. This is particularly so for good staff people who have genuine concern and compassion for their clients, and healthy achievement motivation in their professional work.

Response:* Pre-program orientation should therefore present the solid results which are available, demonstrating the positive impact of volunteers on clients in well-run programs.

2. Even if volunteers are effective with clients, they will become interposed between the staff person and the client, depriving staff of the satisfaction of direct contact. This satisfaction is one major reason good staff sign on in the first place.

Response: Systems analysis in pre-program orientation (Section VI). Using volunteers, staff can have even more direct satisfaction of working with a smaller caseload which they choose as needing their direct attention, while other clients are assigned to volunteers. There is also the added dimension and variety of satisfaction inherent in direct supervisory contact with volunteers.

Concern for Professional or Other Staff Status

Put yourself in staff's place. Your profession is still struggling for identity and recognition as a profession, and here come these people who (at their undiplomatic worst) seem to be saying any layman can do the same thing. Your role as a professional was only beginning to jell when volunteers came along and forced you to try to re-define it. Similarly, you've struggled and sacrificed to meet educational requirements for your position, and you hear the ego-threatening message: These volunteers can do what you do, maybe better, with virtually no special training at all.

How would you feel? How would you react to an implied vote of "no confidence" in your profession from the very citizen taxpayers who have failed to give you enough real funding to implement it?

Nor do you have to be professional staff to feel status threatened. (Indeed, the Joint Commission studies indicated that line staff are less accepting of volunteers than professional staff.) There is a certain pride in being able to earn money for what you do. (Remember even volunteers (or their husbands) do make money in other ways.) And there is a certain necessity too, for bread on the table. Yet what you seem to hear is this: "What you accept money for doing, volunteers can do as well for free." You'll be replaced; you're going to lose your job to volunteers. Worse, it's not just volunteers who say this, it's your budget board, grasping at volunteers as a budget-cutting expedient.

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*All these points of response are dealt with in more detail in succeeding sections.

How would you like it if someone said that about your paid occupation, or your husband's or your wife's?

Response: Experience shows that volunteers require more paid staff, not fewer. They add to the professional challenge of staff roles, now as supervisors of volunteers, and to the power of staff, serving as extensions and amplifications of their potency.

Moreover, a side-effect of fine programs is volunteers lobbying in the community on behalf of more funding and other support for productive staff operations.

Concern for Control

Fear of loss of control is a basic human fear which Agency-wise volunteers easily trigger, as confirmed by results cited in Section I. Volunteers are part-time unpaid people, hence not properly accountable or loyal to the agency. They'll breach confidentiality, flout security* or probation rules, and generally do what they darn please. Someone else owns the program and you wonder just what's going on out there. On top of the problem of controlling the offender, which is hard enough, you must now worry about controlling the volunteer, too.

It's not a pleasant prospect, to feel ambiguous or actually powerless in regard to the people who supposedly work for you.

Response: Get the point across that volunteer program processes - good volunteer recruiting, screening, training, reporting, supervision - are all designed specifically to make volunteers reasonably accountable to the goals of the system. Thus, volunteers are accountable if and as staff takes responsibility for making them so via skill and time investment in these areas. Point to observations which show that if you are serious about this, volunteers will have a genuine desire to please you in their work.

Visibility Threat

This is similar to fear of loss of control in the sense that suddenly you feel a little naked and vulnerable. Here are all these laymen, not just coming through on a quick guided tour, but actually in the shop with you, day after day. They're bound to see under the rug and into the closet. Then they'll probably blab to the press.

Some have, in fact, though it's rare.

Response: A great light dawns if a fundamental change of attitude can occur on the part of staff. why try to hide the closet? Take the volunteer to the closet and say: Look, you're a taxpayer and you own this closet too. It's our problem, yours and mine, not just mine anymore. So look at it and suggest what we can do about our problem in this agency. Let's work on it together.

What a relief not to have to hide problems anymore, but to be able to talk about them openly with people who, by virtue of their desire to serve with you and experience so serving, will be sympathetic to your frustrations and aspirations.

Moreover when they go out in the community and talk about it, they're far more credible than you, because they haven't a nickel to gain by any correction of corrections.

Certainly, your volunteer training will have to stress the avoidance of irresponsible public talk by volunteers. Nor will volunteers always see solutions in the same light as you do. Finally, staff will have to learn a more non-defensive kind of leadership of people, a creative leadership willing to

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*In September, 1972, major blame for prisoner unrest in a Maryland institution was placed on volunteers. The volunteer program was shut down, pending procedures for tightening it up.

accept some challenge and learn from it.

And here's a bonus. Sometimes you'll find volunteers voicing the very criticisms you've been biting back for years, because you have a paycheck to think about. They don't, and they become part of the solution rather than part of the problem.

Fear of the New and Untried

"Status quoters" will probably always remain afraid of any change, for fear it will rock the boat.

Response: The history of volunteerism stretches back to the middle eighteen hundreds in a continuous line. Moreover, even the modern upsurge in volunteerism has a clear history of almost twenty years. It's hardly a radical idea (See Section VI).

Fear of Speaking Up

Unoriented staff are naturally subject to conflict and guilt feelings about volunteers. They're genuinely uncomfortable about the performance and impact of volunteers (the first five fears). On the other hand, they realize volunteers are generally nice well-intentioned people, working for free, and who are they to criticize what's offered free of charge, in a spirit of goodwill?

Conflict leads to repression or superficial lip service (which is worse than reasoned opposition out in the open).

The primary problem then is to get staff to ventilate their concerns, bring them out in the open so they can be looked at and discussed openly.

Response: Say to staff: Don't feel guilty about volunteers. They do receive "pay" for their service, the real benefits of personal satisfaction, so there's no shame in criticizing them for valid reasons, or expressing concerns just as you would for a serious paid worker. Moreover, our main concern is for the client, which means we should have no guilt feelings about getting the best service we can for him, paid or unpaid.

Work with staff in a relaxed atmosphere in small groups or privately, preferably without the boss present to add anxiety. Maybe prime the pump with a little criticism of volunteers of your own (in some programs, not in the good one your agency intends to run).

Don't come on like volunteers are a miracle cure and particularly don't get your hackles up at the first real criticism that comes out. Approach volunteer programs as a real thing, a potentially good thing, but not a perfect thing.

Make it known (if at all administratively possible to you) that only those genuinely interested need participate as staff in the volunteer program and that no one will be forced to participate.

Section IV following elaborates all these points.

CHAPTER 7: MANAGERIAL SKILLS

This section of the handbook is designed to give the co-ordinator an overview of administrative skills other than those dealing directly with people. As a department head the co-ordinator is responsible for his/her program and thus must have some knowledge of the planning and decision making processes.

Week 9 - Managerial Skills

Topic 1 - Planning

- Practical approach to day-to-day and long-term planning necessary for successful operation of the agency branch.
- How to develop an overall planning process
- Costing and allocation of funds

Topic 2 - Problem Solving

- Specific techniques or approaches to problem solving

Topic 3 - Evaluation of Volunteer Programs

- How to design an ongoing evaluation process for the agency

Topic 4 - Office Supervision and Management

- Delegation of workload and responsibility
- Effective use of time
- Files/recordkeeping

RESOURCE PERSON

An experienced office manager who is skilled in planning and decision-making and preferably one who has experience working with volunteer agencies.

READINGS

Core Readings

X 1. Kehle, J., "Structuring and Administering a Modern Voluntery Agency", Social Work, 1969, 14(4), 21-28.

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3. Byrd, R.E., "Planning with Volunteers", Adult Leadership, May 1965, 5-7.

4. Jones, J. & Pfeiffer, J. (eds.) "Common Problems in Volunteer Groups", 1975 Annual Handbook for Group Facilitators, University Associates Publishers, 1975.

Supplementary Readings

*1. Macleod, R.K., "Program Budgeting Works in Non-Profit Institutions", Harvard Business Review, 1971, 4 9(5), 46-56.

2. McCurdy, W.B., "An Approach to the Coordination of Statistical Reporting by Voluntary Agencies", Social Casework, 1963, (April) p. 193-199.

3. Reimnitz, C.A., "Testing a Planning and Control Model in Non-Profit Organizations", Academy of Management Journal, 1972, 15(1), 77-87.

4. Hush, H., "Collective Bargaining in Voluntary Agencies", Social Casework, 1969, (April), 210-213.

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* included in Book of Readings

5. Stenzel, Anne K. and Helen M. Feeney, Volunteer Training and Development, Seabury Press, Inc., 1968, p. 171-204. ("Evaluation of Volunteer Training and Development")

HANDOUTS

1. A Planning Process for Volunteer Programs
2. Evaluation Research and Citizen Groups
3. Solving Problems In Nuclear Groups (SPIN)

RELEVANT EXERCISES FROM PART II

Exercise 14 (Planning)
Exercise 2 (Problem Solving)
Exercise 18 (Evaluation)
Exercises 5, 16, 17 (Office Supervision)

A PLANNING PROCESS FOR VOLUNTEER PROGRAMS

- Pat Ross

Introduction

Ideally, before the first volunteer appears for work with your organization there should have been a planning process conducted by your agency. This paper presents one possible approach which could be used prior to the initiation of a volunteer program.

However, as is often the case, volunteer programs are functioning within an agency before any such planning process occurs. If this is your present situation, perhaps now is the time to consider whether your program would benefit from a planning process. The process outlined below is equally applicable to a volunteer program which has already been established.

The planning process proposed here identifies eight sequential stages:

1. Identification of needs and problem definition
2. Identification of Goals
3. Identification of Objectives
4. Assessment of Resources
5. Priority Setting
6. Strategy Development
7. Evaluation
8. Re-Definition and Re-Evaluation

1. Identification of Needs and Problem Definition

Generally, a planning or problem-solving process starts from the feeling that the current state of affairs is unsatisfactory. Sometimes the needs are vague, but they represent a concern about changing the situation. It is important to examine these felt needs and specifically define the problems which exist. That is, identify:

- what ought to be
- what is
- what are the contributing factors

2. Identification of Goals

Goals indicate the general direction of where you want to go and what you want to accomplish. More precisely they tell:

- whom you serve (i.e., your clients)
- the general nature of your service
- provide boundaries that indicate what you would do and would not do
- tell <u>why</u> you exist
- go on forever.

If your goals are too general, they are useless, they should give some idea of your group's direction.

If the volunteer program is one branch of a larger organization, or is sponsored by another group, you should identify the goals of both and compare these. If the goals of these two groups are <u>very</u> different and in conflict, a problem exists. Major differences must be reconciled or any alliance would not be workable.

3. Identification of Objectives

Objectives are related to your identified goals, however, they are more specific. They are operationalized goals. They identify WHAT to do, and to WHOM.

a) Long-term Objectives: Long-term objectives must meet the following criteria:
   - feasible
   - set within a time frame
   - measurable
   - indicative of an acceptable level of achievement; that is, tell exactly how much of the desired result must be achieved to consider the effort successful

   There are two basic types of long term objectives:
   - client-centered objectives which state what is going to be accomplished in serving the target group or clients.
   - organizational-centered objectives which state what kinds or organization building and resource gathering are necessary to provide the services to the clients.

b) Short-term Objectives: Short term objectives have all the characteristics of long term objectives except they are in a shorter time frame. They contribute directly to the long term objectives - they are "stepping stones" toward the accomplishment of long term objectives. Hence, they have the advantage of breaking large targets into smaller, less overwhelming targets, and they help you see what needs to be done in the near future.

4. Assessment of Resources

It is necessary to deal with the realities of your particular situation. Therefore you must identify:
   - what resources you possess - what you can get, what you can do, what help you can get
   - what constraints you face - staff limitations, time and money restrictions, etc.

5. Priority Setting

Examination of the problems you have identified, the desired goals and objectives for your program and the assessed resources you have defined, may make it necessary for you to get priorities on your short and long term objectives so you may concentrate your resources on high priority items. Even if you feel you can accomplish all your objectives, you may find it advantageous to set priorities so you can plan time accordingly, ensuring that high-priority objectives are met.

6. Stategy Development

Once your goals and objectives have been identified, and possibly priorities set on these, it is necessary to develop strategies which will lead to the accomplishment of each objective, i.e., the HOW to do it. Several alternative strategies may be available to accomplish your objectives and you may wish to "brainstorm" alternative approaches which would be available. After a list of possible strategies has been developed, it will be necessary to choose those which are most reasonable and likely to succeed in your program.

It is important to recognize that strategies will emerge for both short and long term objectives and will be connected to a time frame.

7. Evaluation

An important part of the planning process is a continual evaluation of your volunteer program. The goals you have identified are timeless and general; hence, they do not lend themselves to evaluation. However, the objectives and strategies you have outlined are feasible, dated, measureable and indicate an acceptable level of achievement. As such, they can be evaluated on the basis of either achievement or non-achievement.

This simple evaluation is only one part of what should be an ongoing program or project evaluation - it merely provides an indication of your progress rather than any attempt to measure the impact of the program.

8. Re-Definition and Re-Evaluation

As indicated in Section 7, the planning process if an on-going one. On the basis of your experiences, you may wish to re-examine your identified problems, needs and future plans, and if necessary, alter your future strategies and objectives.

THE PEOPLE WHO PLAN

People who are meaningully involved in a planning process tend to be more committed to the strategies which emerge. Thus, it seems important that people who are affected by the plan (or representatives of these people) should be involved in this process - for example, representatives of: decision-makers within your organization, other staff within your organization, the volunteer coordinator, volunteers, clients, related agencies. Also, it is worth considering if there are others which you can involve who have specialized skills related to your program (eg: people with expertise in media and public relations, experts in organization, fund raising, etc.).

One possible approach is to form a planning committee whose terms of reference would include the development and monitoring of an ongoing planning process for your program.

EVALUATION RESEARCH AND CITIZEN GROUPS

An explanatory paper prepared by
Department of the Secretary of State,
Pacific Regional Office,
Vancouver, B.C.

1. WHY THIS PAPER?

The Secretary of State has received a number of requests from citizen groups for help with evaluating their projects. These groups have wanted to find ways of taking a look at their objectives and activities that would help them improve their efforts. This paper was developed in response to these requests. If you would like further assistance, please feel free to contact a field representative of the Secretary of State Department.

2. INTRODUCTION

Projects initiated by citizen groups are usually limited in duration, and started without any commitment from the funding agencies to their long-term continuation. The funding agencies often see the project as an opportunity for innovation, for trying out new ideas, new strategies, or new structures. Citizen groups, on the other hand, tend to perceive their projects as providing a needed service, as solving a pressing problem, or as resolving an urgent issue. These are two very different perceptions of the same project.

The explanation of evaluation research in this paper is based on two considerations:

- Projects initiated by citizen groups should be viewed both as providing a needed service (solving a pressing problem, ...) and as an opportunity for producing useful information about the needs for such a service, the nature of the problems being tackled, the difficulties with implementing certain strategies, ...In other words, the projects should be seen as action research.
- Evaluation research is a tool which can both improve the project as it develops, and produce a final report that narrates what has been learnt through the project. It can also be used to make a case for further funding.

3. WHAT IS EVALUATION RESEARCH?

Evaluation research is the systematic collection and analysis of information concerning a project or program, leading to judgements about the project or program.

The key words in evaluation research are:

Effects: - What changes occur as a result of the project?
- Who or what is affected, and how?

One aim of evaluation research is to fully describe the effects.

Objectives: - What is the project expected to accomplish?
- What changes or effects are considered desirable?
- Are there long-term and short-term objectives?

One aim of evaluation research is to help define the objectives in such a way that judgements can be made concerning the degree to which they have been achieved, or might be achieved. Often, this means translating general objectives into a number of more short-term, specific goals.

Effectiveness: - To what extent have the achieved effects matched the objectives?

- Which effects (including the side effects) are considered desirable?
- Whose values are used to make these judgements?

Evaluation research contains both descriptive and judgemental components. One aim of the research is to make judgements about the effectiveness of the project, and the desirability of the effects.

Efficiency: - What are/were the costs (time, energy, money, etc.) of the project?

A common aim of evaluation research is to compare several projects with similar objectives as to their relative effectiveness and efficiency.

4. TYPES OF EVALUATION RESEARCH

There is a wide range of types of evaluation research. In fact, no one research effort is the same as another. Some stress objectivity, others do not. Some rely on quantitative information, others on qualitative information. Some are done by outside people, others by project staff.

The two main factors in determining the nature of the research effort are:

- WHAT ARE THE RESULTS OF THE EVALUATION TO BE USED FOR; OR, WHAT QUESTIONS NEED TO BE ANSWERED?
- WHAT IS THE NATURE OF THE PROJECT BEING EVALUATED?

There are two main types of evaluation research.

Outcome evaluation is geared to making an overall decision about the project: should it be continued or terminated? It concentrates on comparing the final outcomes or the project with the objectives.

Process evaluation is an on-going process, where information is collected and analyzed continuously, as a means to helping the day-to-day decision-making of the project. It is a learning process where the focus is on determining why the project is failing or succeeding, and so is likely to be useful to other groups involved with similar projects. This type of evaluation concentrates on describing the various activities of the project, and their effects, and on making relatively subjective judgements about the effectiveness of these activities.

5. WHAT ARE THE USES OF EVALUATION RESEARCH?

Evaluation research has been used for many purposes, to answer many different questions. For example:

- to demonstrate to others that a project is worthwhile.
- justify past or projected expenditures.
- to support project continuation, expansion, or redirection.
- to compare different types of programs and program methods.
- to determine whether the needs for which a project was designed are being met.
- to determine whether the initial objectives were realistic.

THERE SEEM TO BE AT LEAST FOUR POSSIBLE USES OF EVALUATION FROM THE PERSPECTIVE OF CITIZEN GROUPS.

(A) TO HELP SEEK FURTHER FUNDING

Citizen groups spend a great deal of time and energy chasing further funding. Some of this time and energy could be saved, and the chances of success increased, if the project is structured in such a way that the information which funding agencies require is collected, analysed, and reported, as the project proceeds.

Note that funding agencies may view the project differently from those who initiated the project. The funding agencies have to view the project within the context of their own programs, objectives, and priorities. One way of finding out what information funding agencies require is to look at thier application forms. It might be useful to do this at the beginning of a project, long before further funding is necessary.

(B) AS A MEANS OF FEEDBACK

It is extremely easy to become caught up in the day-to-day activities of a project, squeezed between overwhelming demands on limited resources and initially idealistic objectives. There is little time for reflection about what is being achieved, or where the project is headed. Evaluation research can be used as a tool to collect information that would help project staff (and board members) regularly take a look at what they have been doing and what they have achieved. Perhaps the most important outcome of ths approach would be a continuous refinement and modification of the objectives of the project, making them more feasible and specific, and more amenable to time deadlines.

(C) AS A MEANS OF OBTAINING FEEDBACK FROM THOSE AFFECTED BY THE PROJECT

Consumer evaluation and criticism are fast becoming an ideal for most projects. One problem is that the consumer's experience is sometimes limited. Evaluation research, by regularly publishing an overall picture of the project (through a monthly newsletter, for example), could facilitate a more useful dialogue between project staff and the consumers.

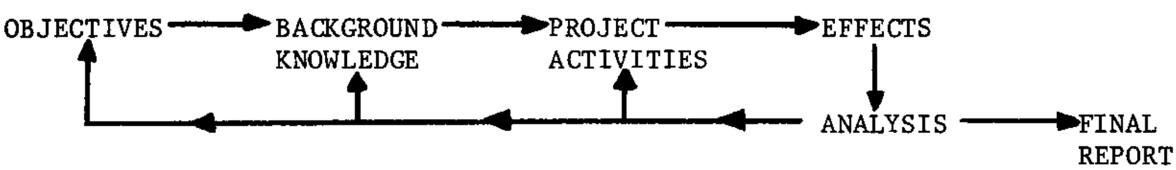
Quite often, a project's success depends upon its acceptance by the people whom it is designed to assist. Providing regular reports about what is happening in the project, and why, would likely promote a realistic judgement of the project on the part of the consumers.

(D) AS A MEANS OF PRODUCING A FINAL REPORT THAT WOULD BE USEFUL TO OTHER GROUPS INVOLVED WITH SIMILAR PROJECTS

This report should describe the history of the project, the objectives and the ways in which they were modified, the activities and the ways in which they were altered, the effects (good and bad, expected and unexpected), the obstacles encountered, the environment of the project,...

6. WHAT NEEDS TO BE CONSIDERED IN SETTING UP AN EVALUATION?

The following diagram outlines the various areas with which evaluation research needs to be concerned. The arrows indicate the way information flows from one area to another. The questions below are suggestions for the type of information that needs to be collected.



(A) OBJECTIVES

- What are the project's objectives?
- Can they be clearly stated at this stage?
- Are the objectives measureable in any way?
- Can the overall objectives be translated into goals for the first three months, the first six months ...?

- Do the objectives appear realistic given the resources (staff, time, energy, money, facilities) of the project?
- Are some objectives more important than others? If so, how is this being taken into account in the operation of the project?
- What specific effects or changes are considered desirable?
- Who is supposed to be affected by the project?

(B) BACKGROUND KNOWLEDGE
- What is known about the nature of the problems being tackled?
- What is known about the community in which the project is operating?
- What assumptions are being made about the way people, groups, or organizations change?
- If the project has a previous history, what can be learned from it?
- What can be learned from similar projects carried out elsewhere?
- What is the general environment: geographic, social, and economic, of the project?

(C) PROJECT ACTIVITIES
- Is the project aimed at individuals, groups, communities, organizations, or the entire society?
- What are the various project activities?
- How are these activities supposed to further the objectives?
- Who is carrying out these activities?
- What skills do project staff need?
- What attempts are being made to help project staff develop these skills?

(D) EFFECTS
- Who is/was affected by the project?
- How are/were they affected?
- Are there long-term effects?
- What unexpected effects (good or bad) are occurring?

(E) ANALYSIS
- Is the project proceeding as planned? If not, what changes have been made, and why?
- Are the resources of the project being allocated according to the priorities agreed upon?
- Are the expected effects being achieved?
- Are the objectives being achieved? if not, is this because the assumptions underlying the project (connecting activities to objectives) are not valid?
- Is the project reaching the people it was supposed to reach, and does the project have their support? If not, why not?
- Were the initial understandings and estimates of the problems that the project is supposed to tackle accurate?
- Is the project trying to do too much? If so, which activities and objectives need to be given top priority, and which can be left for the future?
- Are undesirable effects occurring?
- Are there factors, not under the control of the project, that are affecting the success of the project?
- What obstacles are being encountered, and what steps are being taken to overcome them?

7. SUGGESTIONS FOR COLLECTING INFORMATION

(A) PROJECT HISTORIAN

It is probably useful for one person in the project, as part of their job, to take on the role of project historian: to take responsibility for the collection, analysis, and reporting of information.

(B) LOGBOOKS

One means of ensuring that an accurate and full description of the project activities is kept is for each staff person to fill out a daily logbook, describing their day's activities, the accomplishments, the obstacles encountered, the people contacted, ...

(C) DATA COLLECTION SHEETS

In those projects which have a great deal of regular contact with people outside the project, it is useful to develop a standardized data sheet, which can be filled out for each contact. The sheet should be as simple as possible, detailing the purpose of the contact, the date, the outcome, any need for further action, ...

(D) DECISION-MAKING GAMES

There are a number of decision-making games that might be helpful in setting objectives, and analysing what has been happening.

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SOLVING PROBLEMS IN NUCLEAR GROUPS (SPIN)

by the
National Information Center on Volunteerism
1221 University Avenue
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Prepared and edited by

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Director of Training

DESCRIPTION: Originally developed by Daniel J. Kralik and the Western Interstate Commission on Higher Education in 1971, the SPIN or Meeting Leadership Skills (MLS) process provides a useful technique to develop awareness of problems, as well as establishes a systematic way of thinking about solving problems through meetings. In a sense, it provides the blue print for action plans for people to use in solving problems. In other words, SPIN is a concrete theory as well as a management tool.

In SPIN, nuclear means a core - a structure group - a core around which something grows. In this process we are referring to the growth of the group as well as its individual members. In a sense then SPIN can be defined as an exchange of ideas between two or more people on an organized basis to achieve profitable results and growth. As it is presented here, the SPIN-technique for the training of volunteer coordinators can be utilized as either a lecture-group discussion, a contract-game simulation or as a combination of both. The SPIN-group process can be presented as a one or two day workshop. It can also become part of a larger and more topic oriented conference. Finally, the SPIN process lends itself to adaptation; it is especially easy for the Training Leader or Central Group Facilitator to fit the process and presentation into their own particular style of training.

Since 1972, the MLS or SPIN technique has been used, refined and popularized by such national volunteer consultants as Jim Jorgensen, Ivan Scheier, and Timm Fautsko.

STATEMENT OF OBJECTIVES:

1. To achieve a better understanding of meetings in general.
2. To learn how to plan and conduct meetings in a limited framework of time.
3. To create a plan of action through a group meeting which solves a specific problem.
4. To learn how to conduct better problem-solving meetings.
5. To be able to train others in the SPIN technique of solving problems through meetings.

METHODOLOGY

I. Introduction

An introduction to the SPIN process is usually necessary and should be presented to a preliminary session of participants first as a lecture and then through small group discussion formats.

1. a. Give a brief history of the process. One may use the above descrip-

tion as well as the recommended resource materials as background data.

b. Define the word "meeting" as an "exchange of ideas between two or more people on an organized basis to achieve profitable results and growth." Explain this definition is part of the SPIN process and will be used throughout the training session.

<u>Time Frame: 3-5 minutes for #1 a and b.</u>

2. a. Ask the participants how many meetings they attend (on the average) each week. Get full participation from the group and write each of their answers on a chartboard paper.

   b. Next, determine the approximate, average number of meetings participants attend each week. Follow the method presented in 2a above. This average should be quite high, especially for people involved in direct program administration.

<u>Time Frame: 5-10 minutes for #2 a and b.</u>

3. a. Ask the participants how many hours they spend in meetings each week. Again full participation is necessary and all answers should be written down. Continue the 2a format above.

   b. Determine the average number of hours per week participants spend in meetings. This figure may be expressed in percentages. Again total group participation is necessary.

<u>Time Frame: 5-10 minutes for 3 a and b.</u>

4. a. At this point, draw a 10-point scale on the board:

   <u>1 2 3 4 5 6 7 8 9 10</u>

   Explain to the participants that 1 represents poor, 10 excellent, and so forth.

   b. Now, ask participants to take a few minutes to evaluate, in their own minds, the success and effectiveness of the meetings they attend while on their jobs.

<u>Time Frame: 1-2 minutes for 4 a and b.</u>

   c. Again, ask all participants to tell you on the 10-point scale what their evaluation is. Do their meetings fall in category 3, 5, 7? Mark their answers down accordingly:

1	2	3	4	5	6	7	8	9	10
	15	10	5	1		5	1		

<u>Time Frame: 5-10 minutes for 4 c.</u>

5. Now, tell participants that you would like to investigate the positive and negative aspects of meetings.

   a. Using the left hand side of the chart paper, list all the things that make meetings a positive experience. Elicit participants' responses here spontaneously.

   b. Once participants have exhausted their positive responses, ask them for and list in the right hand column of the chart paper their negative responses. This column should be more lengthy than the positive list.

   c. Discuss further any concerns participants may have about meetings. Be prepared to add additional negative aspects of meetings that may have been overlooked. Examples of this are: (1) good ideas aren't written down (2) ideas go off into the air (3) talk instead of action

(4) hidden agendas (5) conflicts (6) communication problems (7) no follow-up (8) too long (9) boredom and (10) issues avoided.

Time Frame: 10-15 minutes for 5 a, b, c.

II. The Process

1. a. After the Introduction is completed (see I above) explain to the participants that they are going to have the opportunity to individually select specific, important, relevant and manageable problems to present at a SPIN group meeting. Furthermore, it is important to emphasize here that the problems they select be specific, real, job-related and non-philosophical. Their problem should cover an area the group is knowledgeable about, not specific technical questions such as an astro-physical equation. SPIN group process is not designed for this type of problem solving.

   It is advisable to have individuals select more than one problem to avoid duplication once the participants are divided into small groups.

   b. Explain to the group that they are also going to have time to plan their meeting. Instruct the participants that they will be given 15-20 minutes to:

   1. Write their problem statement
   2. Decide upon their meeting objectives
   3. Prepare a brief introduction to their problem

Time Frame: 5-10 minutes for 1 a and b.

2. Once participants fully understand the above, they are now ready to review the SPIN process. They should be told to take careful notes in this section, or outline handouts may be provided. The following outline for conducting SPIN groups should be presented for each participant to follow:

   A. Introduction
      1. Write out the problem statement on chartboard paper.
      2. In two minutes or less complete a brief introduction to the problem.
      3. Write out the cause of the problem. Is the cause known or unknown?
      4. Write out the effect of the problem.
      5. Underline all key words in parts A, C, D above.

   Time Frame: 4 minutes for A.

   B. Starting Question

   In part two, the meeting leader or person conducting a SPIN meeting should present the starting question to the group. For example, a starting question such as, "In Malfunction Junction I have a difficult time recruiting volunteers for my tutorial program", would be appropriate.

   Time Frame: 1 minute for B.

   C. Brainstorming

   The third and most valuable part of the SPIN group process is brainstorming. Here group members are able to participate and assist the meeting leader in solving the problem. All ideas elicited from group members must be written down, no matter how small or irrational they seem. In this section of the process, discussion of individual ideas is discouraged. The meeting leader should accept ideas and encourage total group participation. Once all ideas from the group are exhausted or the suggested time frame expended, the meeting leader should move on to part IV following.

   Time Frame: 10 minutes for C.

D. Selection

Selection is accomplished through a strictly arbitrary process. Once all ideas from brainstorming are listed, the meeting leader should quickly select the ideas that can best assist in solving the problem. Time should not be wasted in philosophizing or arguing with group members over details or moot points. Remember SPIN is a training exercise designed to provide volunteer coordinators specific group process and leadership techniques. However, it must be noted that this portion of the exercise may create dead-time or silence for the group. The meeting leader is urged to briefly explain selections and deselections as he goes in order to hold group interest.

Time Frame: 3 minutes for D.

E. Action Plan

At this juncture the meeting leader should draw the following diagram on a new piece of chartboard paper:

ACTION PLAN		
Who	What	When

The Action Plan is not a game nor a simulation. It is a "contract" between the meeting leader and group members and should be treated as such.

The meeting leader should quickly review the selected ideas, priortize them, and then begin to enter them, one by one, into the action plan. For example, if one of the selected and priortized ideas from Brainstorming is "Tom Fike has a book on recruiting tutors" the entry into the action plan should resemble the following:

ACTION PLAN		
Who	What	When
1. Tom Fike	Will send me his book on recruiting tutors by	Nov. 4

The meeting leader should be encouraged to create the action plan quickly and efficiently. Participants should avoid contracting with themselves too often. An action plan that reads, "I will do this - I will do that" doesn't allow for much group participation.

Time Frame: 7-9 minutes for E.

F. Evaluation

One of the key factors to having good meetings is an evaluation of the meeting leader. In the SPIN process this is done after the meeting has ended.

In the evaluation process of SPIN the group resource trainer(GRT) debriefs the meeting leader in the following way:

First. The GRT asks the meeting leader what that person's "well dones" are, or what did you do or successfully accomplish in the conduct of your meeting? At this point, no group input is allowed. After the meeting leader expresses their "well dones", then and only then does the GRT open discussion up to the group. They are then asked what they think the meeting leaders "well dones" are.

Second. The GRT then asks the meeting leader what that person thinks their "opportunities for improvement" are or what didn't you accomplish, what went wrong and/or how didn't you follow the SPIN process. Again, the same debriefing process listed above is followed.

The end of the evaluation should complete the SPIN process for one meeting leader. The meeting leader should be allowed to keep the chart papers - specifically the action plan.

Time Frame: 5-10 minutes for F.

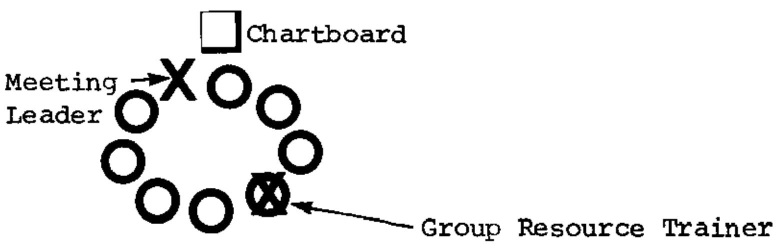
III. Logistics

1. After II, the Process of SPIN, has been explained to the participants, the Logistics of the exercise should be covered.
   a. Participants should be told that they will each have 25 minutes to conduct their SPIN meeting:

Introduction	4 minutes
Starting Question	1 minute
Brainstorming	10 minutes
Selection	3 minutes
Action Plan	7 minutes
TOTAL meeting length	25 minutes

   b. It is advisable for each participant/meeting leader to appoint a group member as time keeper. The time keeper is responsible to:
      1. Start the meeting and keep track of time.
      2. Tell the meeting leader when there are 5 minutes left in the meeting.
      3. Call "time" on the meeting when the 25 minutes have expired.

2. a. At this time the participants are ready to be divided into small groups of 6-10 each. These small groups may be comprised of (1) people from various backgrounds or (2) people from the same geographical or programmatic areas. Each group should be assigned to separate rooms or at least positioned in a large room where their meeting process will not be disturbed by another group.
   b. Each meeting room should be equipped with the following:
      1) One flip chart or chartboard with enough paper for a maximum of ten meetings.
      2) One chartboard stand.
      3) Two dark-colored felt-tip Magic Markers
      4) One roll of masking tape
      5) Sufficient seating for all group members
   c. 1) In Parts I and II, participants are in plenary session and it is advisable to use a classroom style seating arrangement. Again, one additional set of materials listed in 2b, above, should be available to the Training Leader for the plenary session.
      2) In Part III, participants are divided into small groups. The seating arrangement in these rooms should be arranged according to the following design:



Each time a meeting is completed and the meeting leader changes, the group resource trainer (GRT) should assume the new meeting leader's empty seat. This technique is used to shift members' attention and highlight the fact there is a new meeting leader about to conduct the SPIN group process. Furthermore, as the meeting leader uses chart paper, it is the responsibility of the GRT to hand or display the papers where all group members can easily see them. In this way, both the meeting leader and group members can easily refer to the papers during any part of the process.

IV. Staffing

Staffing for the SPIN group training is not as complicated as it seems.

1. The introduction and process needs to be presented to a plenary session of participants by one training leader. This person should be well-read and experienced in the SPIN group process. The training leader is in charge of the entire session and should have the final say in any procedural or problematic questions regarding the process.
2. The small group process of SPIN is detailed in Part III - Logistics. As stated, each small group of 6-10 members needs one group resource trainer (GRT). These people may be separately trained in the SPIN process prior to the plenary session or can have previous experience in conducting a SPIN group meeting. The group resource trainers are responsible for the following:
   a) Making sure all materials are present and seating arrangements are satisfactory.
   b) Starting the SPIN group meeting. Oftentimes, the group resource trainer can demonstrate the first meeting. This is optional.
   c) Assisting the meeting leaders in following the SPIN process.
   d) Display chartboard papers as needed.
   e) Allowing only twenty-five minutes for the meeting.
   f) Conducting the end-of-meeting evaluations as described in Part II - The Process, Part VI - Evaluation.
3. As an optional part of the plenary session, the training leader can conduct a demonstration SPIN meeting before the entire group. Group resource trainers should be used as the meeting participants. This approach can be used to replace the individual GRT meeting described in 2b (above).

V. Participants Evaluation

At the end of the SPIN group meetings a plenary session may be convened by the training leader to evaluate the effectiveness of the process. Each group should elect a spokesman to express the group's feelings of "well done" and "opportunities for improvement" as related to the training process. The individual group logistics for this session may be organized by the group resource trainer.

In conclusion, one trainee put it most aptly when he said, "Before I learned SPIN, going to meetings was like getting hit over the head with a hammer - it feels so good when they stop."

GENERAL EVALUATION OF THE TECHNIQUE

1. The SPIN-group process has been one of the most popular and effective of training techniques presented by the National Information Center on Volunteerism. At national NICOV-sponsored training conferences for volunteer coordinators, the SPIN-group process has consistently averaged between "good" to "excellent" on an evaluation scale of eight:

1 2	3 4	5 6	7 8
Poor	Fair	Good	Excellent

   a) For example, at a training conference for New England Coordinators of Volunteer Programs in January 1974, the following question was asked during an end-of-conference evaluation:
   "What topics or presentations were most useful to you?"
   Participants responded in the following manner:

27 listed MLS/SPIN
5 listed Programatic
5 listed Overview of Volunteers
4 listed Volunteers Job Development
3 listed Other Topics

b) During the Second National Training Conference for Volunteer Coordinators in Prevention/Diversion Programs, August 1974, 64.1% of the participants stated MLS/SPIN groups were "very useful", while 25.6% listed the process as "useful" and 10.2% said it was "not useful."

c) In Columbia, South Carolina, the MLS/SPIN training technique was presented in December 1974 to Volunteer Coordinators of the Alston-Wilkes Society. At this conference the process earned a 7.4 rating on an eight-point scale.

d) As a training technique, the SPIN-group process should be used only once. Participants who have been exposed to SPIN more than once tend to lose interest in it and detract from the other participants' learning process. Training leaders using SPIN are advised to involve such people as group resource trainers (GRT) as well as to utilize their experience with the small group process discussed in Part II - The Process.

Resource Materials

Auger, Bert Y., Meetings, St. Paul Business Service Press, 1966.

Dun and Bradstreet, Inc., Business Education Division, How to Conduct a Meeting, The Dun and Bradstreet Business Series #9, New York, 1969.

Hegarty, Edward J., How to Run a Better Meeting, McGraw-Hill, 1957.

Jorgensen, James and Scheier, Ivan H., Solving Problems in Meetings [1)]

Kralik, Daniel J., Meeting Leadership Skills, Western Interstate Commission On Higher Education, Boulder, Colorado, 1971.

Long, Fern, All about Meetings: a practical guide, Ocean Publications, Dobbs Ferry, N.Y., 1967.

1) This book is scheduled for publication in 1976. Working papers of it are available through the National Information Center on Volunteerism, Box 4179, Boulder, Colorado.

CHAPTER 8: HUMAN RELATIONS

The second major subject of interest to volunteer coordinators is human relation skills. Although many of those skills have been touched upon in other sections of the training program, Week 10 discusses the area of leadership and Week 11 focuses on communication.

Week 10 - Leadership

Topic 1 - What styles of leadership are most effective

Topic 2 - Theories of leadership effectiveness

Topic 3 - The Role of a Leader in Groups

RESOURCE PERSON

College professor or skilled human relations trainer.

READINGS

Core Readings

1. Lippett, Gordon (ed.), Leadership in Action, National Training Laboratories, 1961.
2. Tannenbaum, A.S., "Control and Effectiveness in a Voluntary Organization", American Journal of Soc., 1961, 67, 33-46.

Supplementary Readings

1. Auerbach, A., "Aspirations of Power People and Agency Goals", Social Work, 1961, 6(1), 66-73.
2. Smith, C.G. and Tannenbaum, A.S., "Some Implications of Leadership and Control for Effectiveness in a Voluntary Association", Human Relations, 1963, p. 265-272.
3. Brown, D.S., "Shaping the Organization to Fit People", Management of Personnel Quarterly, Bureau of Industrial Relations, The University of Michigan, Ann Arbor, 1966.

RELEVANT EXERCISES

FROM PART II

Exercises 12 and 14.

Week 11 - Communication

Topic 1 - Intergroup competition and cooperation

Topic 2 - Communication patterns

Topic 3 - One vs. Two way communication

Topic 4 - Communication skills

RESOURCE PERSON

A skilled human relations trainer

READINGS

Core Readings

Hanson, Philip, "Giving Feedback: An Interpersonal Skill", 1975 Annual Handbook for Group Facilitators, University Associates Publishers, Inc., 1975.
Dimock, Hedley, Factors in Working with Groups, Sir George Williams University, Montreal, 1970. ($1.00)
Dimock, Hedley, How to Observe Your Group, Sir George Williams University, Montreal, 1970.

RELEVANT EXERCISES FROM PART II

Exercises 7 and 8.

Week 12 - Final Session

Topic 1 - Evaluation of the Course (Sample evaluation follows)

Topic 2 - Questions and General Discussion about Course

Topic 3 - Presentation of Certificate and Social Evening

EVALUATION OF THE VOLUNTEER CO-ORDINATORS'

TRAINING PROGRAM

Fall/75

You will not be asked to identify yourself anywhere on this questionnaire.

1. Where did you learn about this training program? (Check one)

_________ Advertising by Langara College

_________ Advertising through the Volunteer Bureau

_________ From someone else (specify: _______ other volunteer co-ordinator;

_______ friend

_______ other)

_________ Other; Specify: _______________

2. What is your general, overall feeling about this Training Program? (Circle one)

1	2	3	4	5
very dissatisfied		neutral		very satisfied

3. What was your reaction to the length of the training program?

1	2	3	4	5
too short		just right		too long

4. How was the fee for the training program paid?

_________ by your agency or organization

_________ by yourself

_________ other; SPECIFY: _______________

5. For each of the topics in the following list, rank on a scale of 1 to 5 the importance you place on receiving training in that particular topic area for your job as Volunteer Co-ordinator. That is, for this question do NOT rank the topic on the basis of the importance of the session as presented during this course, but rather the general importance of that topic to you as an area in which you have (had) a need for training.

	Not Important		Somewhat Important		Very Important
Communications	1	2	3	4	5
Screening, Placement, and Orientation	1	2	3	4	5
Evaluation of Volunteer Programs	1	2	3	4	5
Training of Volunteers	1	2	3	4	5
Motivation of Volunteers	1	2	3	4	5
Recruitment and Public Relations	1	2	3	4	5
Volunteer-Staff Relations, and Board Relations	1	2	3	4	5
Interviewing Skills	1	2	3	4	5
Management Skills	1	2	3	4	5

6. What other topics would you recommend to be included in future training programs such as this for volunteer co-ordinators.

7. How important was it to you to have an opportunity to spend some time in discussion with other volunteer co-ordinators in the group?

1	2	3	4	5
Not Important		Somewhat Important		Very Important

8. Do you have any comments regarding the role, and/or effectiveness of the various resource people and speakers which participated?

9. Do you have any comments regarding the role, and/or effectiveness of the Co-ordinator of the training program?

10. What were three strengths or benefits of this program for you?

11. What were three weaknesses of this program in your opinion?

12. To what extent did you read the reading materials?

None	20%	40%	60%	80%	All

(if you answered "none" to the above question, omit questions 13 to 15).

13. How relevant was the reading material to you in your job as Volunteer Co-ordinator?

1	2	3	4	5
Not Relevant		Somewhat Relevant		Very Relevant

14. What is your feeling regarding the amount of reading material?

1	2	3	4	5
Not Enough		Just Right		Too Much

15. Could you recommend any further articles or books that might be included in future sessions?

16. Would you be interested in taking a follow-up program to this if one were available?

1	2	3	4	5
Not Interested		Somewhat Interested		Very Interested

17. If you would be interested in such a program, what suggestions would you have for content and format?

18. ANY OTHER COMMENTS YOU HAVE REGARDING THIS TRAINING PROGRAM (please write on back of this paper)

PART II - A SELECTION OF EXERCISES AND INCIDENT STUDIES

INTRODUCTION TO PART II

Part II is a compilation of 20 exercises, projects and incidents which are relevant to the training of volunteer co-ordinators.

These exercises were designed for this manual in order to provide material that would specifically deal with experiences common to the volunteer field and be most applicable to the coordinators' needs.

The exercises may be used either in conjunction with the sessions in Part I as part of the overall format for a training course, or they may be used individually as a portion of training sessions designed for specific needs.

The chart on the following page specifies the training areas covered in each exercise.

TABLE OF CONTENTS

EXERCISE

* - major issue
✻ - secondary issue

AREA

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
Planning/ Goal Definition	✻											✻		*			*			
Job Descriptions									*		✻					✻				
Recruitment/ Placement											*								*	*
Orientation										*			✻							
Leadership/ Supervision												*		*						
Public Relations		*											*	✻						
Budgetting/ Funding						*						✻								
Record Keeping/ Evaluation																*		*		
Conflict				*											*					
Authority/ Discipline					*										✻					
Motivation	*									*										
Controls, Rules	✻			*										✻						
Communication & Communication Skills							*	*				✻		✻						
Interviewing			*												✻					*
Board Relations & Volunteer/Staff Relations				*								✻			*					

PURPOSE: To give the co-ordinators an opportunity to deal with the issues of control and job satisfaction; a secondary issue raised in the discussion questions is that of goal definition and potentially conflicting goals in a co-ordinators role.

TIME REQUIRED: 45 minutes

TECHNIQUES USED: Incident Study; Small Group Discussion

PROCEDURE:

1. Distribute the incident to all participants and have them spend 15 minutes reading the incident and individually writing answers to the discussion questions.
2. Have the participants divide into small groups (4-5 persons per group) and for 20 minutes discuss the questions jointly and attempt to come to some concensus regarding their answers.
3. As a total large group, spend 10 minutes summarizing the critical issues from the incident, as seen by each small group.

REASSIGNED!

Janet Thomson had lived in Littletown, B.C. for several years, and for the past year had been working as a volunteer for Littletown's Community Services. For the past six months, she had been a "volunteer probation officer" to Terry, a 14 year old boy who was on probation for breaking and entering into several homes in the area, as well as theft of various articles from the homes.

Val Williams, the volunteer co-ordinator had initially placed Janet with Terry and had received feedback since then, both from Terry's mother and from Janet that Terry seemed to be much more outgoing now, was doing better in his schoolwork, and had spent some Saturday's out hiking with Janet's children. Janet had been meeting twice a week with Terry and had always been reliable and consistent in her commitments - she was enthusiastic about Terry's progress and told Val that Terry and her children were thinking of organizing a hiking club.

The week that Terry's probation finished a crisis arose in the Information Center. Two of the regular, stalwart volunteers suddenly resigned - one due to illness and one moved out of town. All of Val's current volunteers were heavily committed and she had only one new volunteer who was interested in filling one of the vacant positions. Val phoned Janet, explained the situation, and said, "So you see, Janet, we're really in a bind. You're the only one I can think of that can cover for us. You wouldn't mind would you?" After some discussion, Janet agreed to "fill in".

Within a few weeks, Janet's behavior in her role as a volunteer changed drastically. She was frequently late in arriving at the Center, she appeared to be uninterested and bored although there was always plenty of work to be done. On two occasions she had disputes with other people in the office. Although she was only committed to one session per week, she asked Val if another person could be found to alternate weeks with her.

Discussion Questions:

1. Janet's behavior differed markedly after her transfer to her new job. How would you explain this?
2. How would you explain the volunteer co-ordinator's behavior in transferring Janet?
3. What do you think that Val's goals were for Janet? for Terry? for the Information center? Do these goals conflict?
4. Assuming that the transfer had already been made, what could Val do when Janet approached her about alternating sessions?
5. If you were the volunteer co-ordinator, how would you have handled the situation when the crisis arose in the Information Center?

2

PURPOSE: To provide volunteer co-ordinators with an opportunity to participate in generating ideas for organizing a public relations campaign; secondary purpose is to expose co-ordinators to the use of "brainstorming" as a problem-solving technique.

TIME REQUIRED: Approximately 1 hour

TECHNIQUES USED: Brainstorming, Small Group Discussion

MATERIALS NEEDED: large sheets of paper (or flip charts) for each small group; felt pens

PROCEDURE:

1. Spend ten minutes describing the rules and procedures for "brainstorming" (Refer to the attached description).
2. Divide the participants into small groups (4-5 persons in each group) and have each group appoint a "recorder" to write suggestions on the flip chart.
3. Distribute the information on "The Blood Drive" and have participants read it.
4. Instruct the participants to spend 15 minutes brainstorming ideas for a public relations campaign (NOTE: Remind them not to evaluate or criticize ideas and to feel free to be "far-fetched").
5. Once the "brainstorming" phase is complete, have the participants remain in their small groups and distribute the second page of the task (i.e. Constraints). Have the groups spend 15 minutes using their "brainstormed" list of possibilities to choose 5 realistic short term strategies (i.e., could be accomplished in 1 month), and 3 long term strategies which they would implement.
6. Have the participants form one large group again. Post the brainstorming lists so that all participants can see the range of ideas that emerged. Have each group present their selected list of short term and long term strategies.
7. Lead a discussion of:
   - brainstorming as an approach to problem-solving (was it a good way to get ideas listened to? did many ideas come out? in what other situations could this method be used?)
   - different approaches to public relations (eg: what different strategies were proposed? which ideas seemed very far-fetched initially, but resulted in reasonable alternatives?)

BRAINSTORMING

Brainstorming can be described as a first step in problem-solving; a method for getting out the maximum number of ideas for consideration. It is a technique which builds on participants' creative abilities and provides experience in developing an experimental frame of mind necessary for effective problem solving.

RULES:

(1) There will be no criticism
(2) Far-fetched ideas are encouraged because they may trigger more practical ideas
(3) Many ideas are desirable

PROCEDURE:

(1) The topic of the brainstorming is introduced.
(2) Participants are divided into small groups (4 - 5 people). Each group selects a recorder. Each group has a felt pen and flip charts or large sheets of paper taped to the wall.
(3) The small groups then spend a set amount of time generating ideas or solutions to the given problem. The recorder lists all of these on the paper.
(4) At the end of the time period, the ban on criticism ends. The groups are directed to evaluate their ideas and select the best ones.
(5) The groups then form one large group again and share their ideas. The group proceeds from there (either to get consensus, choose multiple strategies, etc.) depending on their needs.

THE BLOOD DRIVE

As one of your duties, you are responsible for organizing this year's campaign for donations of blood to the blood bank. This is a program for a small city of 40,000 people. You are aware that over the past few years donations have been dwindling, so you are determined to run a strong campaign in an attempt to increase the reserves of blood.

Before getting down to any detailed planning, you want to hold a "brainstorming" session to generate a wide range of alternatives which could be used for a public relations campaign such as this.

CONSTRAINTS FOR

THE BLOOD DRIVE

1. While your job and the campaign will continue throughout the year, you have decided to concentrate one month on a strong advertising campaign to attempt to get people aware of th drive and then follow-up throughout the rest of the year with intermittent advertising.

2. You have a total budget of $300.

3. You have your (full) time for one month as well as three volunteers (full) time for one month; then you have the equivalent of one (full) time volunteer for the remainder of the year, as well as a small portion of your time.

On the basis of these constraints, decide on at least 5 short-term strategies (that would be implemented in one month) and 3 long-term strategies which you would implement over one year.

3

PURPOSE: To give volunteer co-ordinators skill practice in interviewing; specifically, an interview with an volunteer who has resigned.

TIME REQUIRED: 45 minutes

TECHNIQUES USED: Role-Playing; Small Group Discussion

PROCEDURE:

1. Discuss good interviewing techniques (Refer to handout following).
2. Divide the group into groups of three, and assign roles of volunteer, volunteer co-ordinator and observer to the members within each group.
3. Distribute role-instructions to those designated as volunteer and volunteer co-ordinator; distribute observer's forms to those assigned a role of observer. (Sample of role descriptions and observer forms follow.)
4. After allowing time for each person to read his role and begin to "identify" with it, give each group 15 minutes to conduct the interview.
5. Then allow 10 minutes for the observer to give feedback based on the comments made on the observer form; and for the other group members to share their feelings and evaluations.

NOTE: If there is sufficient time, it is also beneficial for each individual to have an opportunity to play, in turn, the role of co-ordinator, volunteer and observer, as this can assist in changing their perceptions on the interviewing process. Additional role-instructions can be designed based on similar situations to the one given, and drawing on your own experience. Refer also to Exercise 20.

GUIDELINES ON INTERVIEWING

Preparing for the Interview

1. Plan for the Interview: make sure there is a clear understanding of the time and place; arrange for a suitable physical setting (is it private? is it convenient? will you be interrupted by telephone calls?); notify the receptionist to expect the volunteer.
2. Before the interview, prepare yourself ahead of time: review any necessary material, application forms, previous records, etc.; do you know what your objectives are for the interview?
3. Give consideration to the option of interviewing with a panel. A team can assist each other in getting the facts and in following up leads, getting more complete information.

DURING THE INTERVIEW

4. Relax. Your effect (emotional appearance) is very important. Make the volunteer feel welcome and at ease.
5. Give the volunteer your full attention.
6. If possible, clarify the purpose of the interview at the start. As well, attempt to clarify both your expectations and those of the volunteer.
7. Don't jump to conclusions - when you don't understand ask for clarification.
8. Listen to what the volunteer says.
9. Observe the way in which he/she says it: especially pay attention to "nonverbal cues" including body posture, body movement, flushing, coughing; as well, be aware of the person's tone of voice, pace of speech.
10. Use "OPEN" rather than "CLOSED" questions where possible ("open" questions cannot be answered with either a simple yes or no).
11. At the end of the interview, summarize any decisions that have been reached and any planned actions, in order to make sure that you are both in agreement.
12. An applicant is entitled to fair play over the outcome of the interview.

AFTER THE INTERVIEW

13. Write up any necessary notes, tasks, reminders for follow-up.
14. Remember: Interviewers should be trained. There are different methods of questioning and evaluating. Some are better than others, and some are appropriate to one situation but not to another.

VOLUNTEER CO-ORDINATOR: SUSAN MOORE

You are the volunteer co-ordinator at the Getwell Hospital. You have only been on the job for three weeks and you are still in the process of getting to know all the sixty volunteers who are actively involved on a weekly basis.

A few days ago, Francis James phoned you to say she wouldn't be coming in any more after this week, as she was having babysitting problems. Francis has been a volunteer with the hospital for the past six months. Since you assumed your job three weeks ago, you have only met Francis once; you went up to the children's ward when she was on duty and you introduced yourself.

The records indicate that Francis has been involved in working on the children's ward on a regular basis once a week. While the information on her file is scant, it seems that Francis is a young mother with two school-age children; she is recently separated from her husband and currently receives financial assistance from the Department of Human Resources.

When you started your job at the hospital you established a policy of talking with any volunteer who resigns to determine their reason for resigning and whether their experience as a volunteer was satisfactory. You have scheduled a meeting with Francis to find out:

- how she felt about the position
- what she liked best about her job
- what were some of the things she didn't like
- whether the job was what she had expected when she decided to volunteer
- what led to her decision to leave
- why did she decide to leave right now

Remember to follow the good interviewing techniques. Be sure to open with a clear description of the purpose of the interview.

VOLUNTEER: FRANCIS JAMES

You applied as a volunteer at the Getwell Hospital six momths ago, shortly after you and your husband separated. After a brief orientation and training period, you began volunteering one afternoon a week on the children's ward. The job is "okay" although you were hoping to make some friends. The nurses seem very busy - you believe some of them even think you're a bother. And you don't get much chance to see the other volunteers.

There is a new volunteer co-ordinator at the hospital, Susan Moore. You don't know her very well - she's been on the job only a few weeks and has met you only once when you were on the ward. You phoned her a few days ago to say you wouldn't be coming in any more after this week. You have indicated that your reason for resigning is "babysitting problems". When your two children get home from school they have been staying at a neighbour's for about one hour - however, the neighbour will no longer be available and you don't feel motivated to find anyone else. Besides, you have been receiving welfare since your husband left and you can't afford to pay a babysitter.

When you phoned Susan, she asked if you would come to see her before you went on the ward for the last time this week. You're not sure why she wants to see you, but you suppose it must have something to do with you quitting.

OBSERVER's EVALUATION FORM

BEHAVIORS OF THE VOLUNTEER CO-ORDINATOR	Effective Behaviors of the co-ordinator	Ineffective Behaviors of the co-ordinator
INTERVIEWER's MANNER -starting the interview (eg: friendly/unfriendly relaxed/tense, etc). -establishing rapport		
INTERVIEWER's TECHNIQUES eg: did she control the interview? was the discussion on subject or off subject? who did most of the talking? did the interviewer test her understanding of the info. she received? did she encourage the interviewee? etc.		
INFORMATION OBTAINED BY INTERVIEWER eg: did she ask effective questions? was the volunteer encouraged to talk? did the co-ordinator follow-up leads? did the co-ordinator probe for more information?		

What suggestions do you have concerning this interview?

4

<u>PURPOSE</u>: To initiate a discussion on the cause and effect of conflict between groups within an organization.

<u>TIME REQUIRED</u>: The exercise, including time for discussing the questions, required approximately 45 minutes. Allow extra time if you wish to discuss the relation between the exercise and the conflict issues within the co-ordinators' organizations.

<u>PROCEDURE</u>:

1. Distribute the incident entitled "Deadlocked" to all participants and have them spend 15 minutes reading the incident and individually writing answers to the discussion questions.
2. Divide the participants into small groups (4-5 persons per group) for a 20 minute discussion of questions. Have each small group appoint one person to report back to the large group on the discussion.
3. As a total group, discuss the various solutions of the small groups regarding how they would have handled the situation. If desirable, discuss how the situation in the incident compares with the co-ordinators' organizations, and what degree of co-operation exists between volunteers and staff in their agencies.

DEADLOCKED

Tom Franklin was the volunteer co-ordinator with Community Service Project in Anywhere, B.C. The project housed five Department of Human Resources workers, as well as several community projects including the volunteer program.

Tom had just run a three month experimental project. At the request of a social worker, who had previously checked with the family to see if they were interested, a volunteer would be matched with a family receiving assistance from the Department. The volunteer's role was to "be a friend" to the family - this could involve everything from helping with the grocery shopping to going on a picnic with the family.

Tom decided to call an evaluation meeting of all the volunteers who had been involved in the project. In addition, he invited representatives from the Social work staff to the meeting.

Before long, a fierce argument erupted between June Whelan, one of the volunteers, and Frank Noles, a social worker.

The argument started when June commented that she had found she got little support from the social workers. The discussion proceeded from there:

FRANK: I have 75 families on my caseload. I don't have enough time to see them... You don't seem to understand that I have alot of demands on my time. Besides, I did spend alot of time when you got involved with that family - before I did anything, I checked with the family to see if they were interested; then I talked to Tom about finding a volunteer; then I talked to you; then I took you out to see the family. Now all that took a whole lot of time ...more than I could afford.

JUNE: Well, look, don't make it sound like you're doing <u>me</u> a favour. All I want to know is why, when I phone you and <u>tell</u> you that the family doesn't have a washing machine, why you don't do anything?

FRANK: I <u>did</u> order her a washing machine after you called; it's just that darn central office that's been holding things up.

DISCUSSION QUESTIONS

1. It appears there is a serious conflict between June and Frank. What do you think caused the problem? Do you think it involves a personality problem? Why or why not?

2. Assume you were assigned to investigate the situation. Given the information you have,
   a) what do you think the basic problems are?
   b) what recommendations would you make to improve the situation?
   c) what resistance would you face in implementing your recommendations?
   d) what would you do to overcome this resistance?

5

PURPOSE: To provide co-ordinators with an opportunity to discuss the issue of dealing with problem situations involving volunteers; the incident specifically describes a volunteer who, without consultation, took action outside his job description.

TIME REQUIRED: 45 minutes

TECHNIQUES USED: Incident Study; Small Group Discussion

PROCEDURE:

1. Distribute the incident "An Independent Approach" to all participants and have them spend 15 minutes reading the incident and individually writing answers to the discussion questions.
2. Have the participants divide into small groups (4-5 persons per group) and for 20 minutes discuss their answers to the questions, and attempt to come to some consensus as a group concerning the answers.
3. As a total large group, spend 10 minutes discussing the small group solutions, and any remaining questions.

AN INDEPENDENT APPROACH

Mark Johnston had worked as a volunteer with the B.C. Corrections for several months. At the request of probation officer, John Wilson, the volunteer co-ordinator, arranged for Mark and other volunteers to be matched with juveniles on probation.

Mark's job description was similar to that of a "big brother"; he became involved on a one-to-one basis with a juvenile on probation whose family felt the boy would benefit from having someone like Mark as a friend. Mark committed himself to spending at least one afternoon or evening with the boy each week. For the past two months, he had been getting to know Jody, a 14 year old on probation for theft.

Mark was a pretty independent kind of person, and after getting to know Jody and his family, Mark decided that most of Jody's problems related to his school, and specifically one or two teachers within the school.

Without consulting either the probation officer or Joan, Mark went to the school, barged into the counsellor, and in the ensuing discussion laid a great deal of responsibility for Jody's problems on certain teachers.

As a result of that conversation, a reaction spread throughout the whole administration of the school.

Joan received a violent complaint from Jody's probation officer concerning Mark's behaviour. The other probation officers were angry over the incident because, since its occurrence, the school had become very uncooperative with most of the staff from the Corrections office. In addition, Joan had received a brief call from the principal of the school indicating his dissatisfaction with the whole incident.

DISCUSSION QUESTIONS:

1. Assume you are the volunteer co-ordinator involved. Based on the information you have been given what would you do regarding:
   a) Mark Johnston
   b) the school
   c) the other staff

2. What implications could this incident have for the volunteer program?

3. What steps would you take to prevent a similar incident from occurring?

6

PURPOSE: To provide co-ordinators with experience in the preparation of an application for funding.

SETTING: Suggested as an individual assignment for co-ordinators to complete between sessions of the course; preferably to be assigned the week before this topic is discussed in the course material, so that any questions resulting from the exercise may be dealt with during the following session.

PROCEDURE:

1. Distribute a copy of the "Instructions" and "Format of Application for Funds" to each participant; read over the instructions with the group and clarify the assignment if there are any questions. Suggest that the participants bring their completed results to the next session along with any questions they have concerning the design of the application.

(NOTE: If any of the participants in the course are not yet involved in a specific program, you might arrange that they get together with one other co-ordinator and jointly prepare an application on the basis of the latter's program.)

INSTRUCTIONS:

Assume that the current funds which you have been receiving for the volunteer program component within your organization have suddenly terminated. You are faced with the necessity of searching elsewhere for funding. (NOTE: If, up to this point, the volunteer program has been operating without any funding - including no paid volunteer co-ordinator's position - assume that your group has made a decision to seek some funds).

1. List as many potential sources of funds (both private and governmental) as you can; list only those sources which seem applicable to the purposes of your program.

2. On the basis of the program you are presently co-ordinating, prepare an "Application For Funds", using the general format proposed on the attached pages. (NOTE: You may not wish to include all the items in the general format; use only those which seem most applicable for your program.)

FORMAT OF APPLICATION FOR FUNDS

1. First Page: Project Title
   Sponsoring Group - names, addresses and telephone numbers of two contact people

2. Title Page:

   - short paragraph with the purpose of the project
   - the amount of money requested
   - time period covered by the request: Month/Year to Month/Year

3. Table of Contents: each section of the proposal is listed

4. Introduction:

   - a brief history of how the group/project started. Insert supporting, or detailed, material as appendices. (i.e. background material on the project, a copy of the constitution, list of members, etc.)
   - current status of your project, i.e. what it is now doing; include present and past sources of funds or support. A detailed budget may be included as an appendix.
   - future plans: What does your group plan to do after this funding ends? Any long-range plans?

5. Operation of Group/Project:

   - objectives
   - benefits of project: to the participants
     to the community
     to the funding body
   - how does your project fit the criteria of the funding body

6. Budget:

   Amount of Support Requested: $__________ Time Period: __________

   to __________________

   Itemize how you will spend the money requested:

	Monthly	Yearly
rent, light, heat		
salaries (# of staff)		
supplies		
equipment		
travel		
telephones		
honoraria		
other:		

7. Your Resources

This section should illustrate your group's commitment to the project:

- donated space or supplied;
- volunteer time involved
- any services you have obtained

8. Anticipated Support

List other bodies you are applying to for funds and indicate what you will use those funds for.

9. Other Groups Supporting the Project

- those groups who support your application
- those groups who are willing to work with you on the project
- those groups who have successfully carried out similar projects in other communities and with whom you have been in contact.

10. Appendices

For the most detailed information; it is easily available and does not clutter up the application.

7

PURPOSE: To expose participants to the frustration of not being heard; to serve as an introduction to a discussion of "effective listening" as one communication technique.

TIME REQUIRED: 30 minutes

TECHNIQUE USED: Role Playing

PROCEDURE:

1. Explain the purpose of the exercise.
2. Have the group form dyads (pairs); have one member of the dyad take the role of the information center volunteer and the other take the role of the citizen.
3. Distribute copies of the role descriptions to each paid and give them about three minutes to study their roles.
4. Have all participants begin at the same time, and allow them to interact for approximately 10 minutes before you stop the activity. (NOTE: Ensure that dyad participants are NOT listening to one another.)
5. As a large group, spend the remaining time (about 10 minutes) discussing participants' responses to the frustration of not being heard (Eg: what their feelings were, how they reacted, how they felt towards the other person, etc.)

(NOTE: This exercise can serve as a good introduction to an exercise and discussion of effective listening.)

INFORMATION CENTRE VOLUNTEER:

You have been a volunteer in this Information Centre for one month. One of the biggest problems that you face is that most of the people you try to help have preconceived ideas about what sorts of information you have.

You feel that the best solution to this problem is to inform a client precisely what services the Centre does offer. Then he or she will be in a much better position to be helped.

Furthermore, you resent those people who make demands rather than ask you for your advice. After all, you're the one that has the information.

As a result, at the beginning of any interview, you make sure that the person knows (1) that you are the one with the information and in a better position to decide what is best for them, (2) exactly what information the Information Centre does provide. (Improvise regarding what information you offer).

(NOTE: Remember that the purpose of this exercise is NOT TO LISTEN to the other person, but to concentrate on getting your own point of view across to him/her as quickly as possible.)

CITIZEN REQUESTING INFORMATION

You have just moved into this town, to discover that the job which had been promised to you had been filled by someone else.

So you are now unemployed, have very little money and to make matters worse, your child awoke this morning with a temperature of 103^{o}. You live next door to the "Community Information Centre", so you have come here to get help. You are quite upset, and you feel you have no time to waste in small talk. You must make this person understand the seriousness of your situation, so he/she can direct you to help immediately.

(NOTE: Remember that the purpose of this exercise is NOT TO LISTEN to the other person, but to concentrate on getting your own point of view across to him/her as quickly as possible.

8

PURPOSE: To develop skills in paraphrasing as a communication technique.

TIME REQUIRED: Approximately 45 minutes

TECHNIQUE USED: Triad Discussion

PROCEDURE:

1. Explain the purpose of the activity.
2. Generate examples of topics for discussion, and write suggestions on the blackboard. Attempt to list topics about which there is likely to be some disagreement within the group (eg: drug use, women's liberation, inter-racial marriages, etc.)
3. Form triads, and have the participants in each triad identify themselves as 1, 2, or 3.
4. Distribute a copy of the "Paraphrasing" sheet to each participant, and read through the description of this technique with the group.
5. For the first round, participant 1 picks a topic for discussion (either from the blackboard or one in which he/she is interested) and identifies whether he/she has a "pro" or "con" attitude to the topic. He then carries on a discussion with participant 2, who takes the opposite point of view on the topic; participant 3 observes. Discussion begins with participant 1 stating his/her position on the topic, with some reasons for it. Discussion proceeds from there, with the following basic RULE: BEFORE EITHER PARTICIPANT MAY MAKE A STATEMENT, HE/SHE MUST FIRST PARAPHRASE WHAT THE OTHER PERSON JUST SAID. The observer's role is to ensure that this paraphrasing occurs during each interchange.

   After ten minutes, the second round begins, in which participant 2 chooses the topic, and discusses with participant 3 while participant 1 observes.

   In another 10 minutes, round 3 commences with participant 3 choosing the topic and discussing the subject with participant 1 while participant 2 observes.
6. As a large group discuss: difficulties experienced in the roles; applications of paraphrasing as a technique (with a statement that it can be overdone and used when it is not necessary).

PARAPHRASING

Most people tend to assume that what they understood from a statement is what the other person intended. How can you find out if his statement meant the same to you as it does to him?

A "paraphrase" is any means of showing the other person what his idea or suggestion means to you. Paraphrasing is any way of revealing your understanding of the other person's comment in order to test your understanding.

An additional benefit of paraphrasing is that it lets the other person know what you really do understand his point of view and that you are interested in understanding what he means.

For example, if a person makes a statement, and you wish to respond by paraphrasing what he said, you might respond with:

"Do you mean....(state what your interpretation is of his statement)......."

"I hear you saying that ....(your interpretation of his statement) ...."

"Is this an accurate understanding of your idea? ...(Your interpretation of his statement)...."

By paraphrasing, you are acknowledging to the speaker that you have heard him, and checking your understanding against his for accuracy.

9

PURPOSE: To provide co-ordinators with experience in the design of job descriptions.

SETTING: Suggested as an individual assignment for the participants to complete between sessions of the course; preferably to be assigned the week before this topic is to be discussed in the course material.

PROCEDURE:

1. Distribute copies of the "Job Description Format" and "Instruction Sheet on Designing Job Descriptions" to each participant (sample copies follow).
2. Have each participant plan on preparing two job descriptions:
   (1) his/her position (i.e., probably Volunteer Co-ordinator)
   (2) a sample job description for one classification of volunteers within his/her agency.
3. The following week, discussion could proceed from any questions participants have, to a general discussion on the use of job descriptions, a polling of how many participants use job descriptions in their organization, what the probable advantages/disadvantages are, etc.

FORMAT FOR JOB DESCRIPTION

JOB TITLE:

OBJECTIVES OF JOB:

1.
2.
3.
.
.
.

JOB ACTIVITIES:

1.
2.
3.
.
.
.

PERFORMANCE REQUIREMENTS:

PARAMETERS OF JOB: (time per day or week, any specific hours required, location)

LINES OF ACCOUNTABILITY:

DATE JOB DESCRIPTION DRAWN UP: ______________________________

DATES OF REVIEWS OF JOB DESCRIPTION: __________________________

INSTRUCTION SHEET ON DESIGNING JOB DESCRIPTIONS

Objectives of Job:

1. Write short sentences describing the work to be accomplished by the job.

Detailed description of activities:

1. What duties does the person perform in the regular course of the job?
2. What duties are to be performed only at irregular intervals?
3. Are any materials, machines and special equipment used?

Performance Requirements:

1. In your opinion, is a certain level of formal education required for this position?
2. What other skills or qualifications are necessary for the position (e.g.: drivers license, foreign language, etc.)
3. What past experience is necessary for a person filling this position?
4. How long will it take an inexperienced new person to learn this job?
5. Are there any other positions in your organization which would provide the training for a person to fill this position?
6. What, in your opinion, is the most difficult part of the work, and why is it difficult?

Parameters of the Job:

1. What are the usual working hours?
2. Where is the job located?

Lines of Accountability:

1. To whom is the person directly responsible?
2. Who evaluates his/her performance?

10

PURPOSE: To determine the expectations of co-ordinators for the course; to initiate a discussion with the co-ordinators on what motivates people to volunteer.

SETTING: First session of the course, as an introduction.

TIME REQUIRED: 1 hour

PROCEDURE:

1. Announce to the group that you want to do a demonstration and ask for four volunteers. If necessary urge them, allow the silence and tension to mount. Wait until you have four people who have offered to be involved.
2. Then immediately state that you have completed the exercise and that you want to use their experience of deciding whether or not to be involved in a "demonstration", to look at what we feel when we volunteer. (Comment on the silence or hesitation; how some volunteered and others did not.)
3. With the group as a whole, find out from those who did volunteer why they did so, and similarly from those who did not. Write their reasons on a flip chart (or large sheets of paper taped to the walls).
4. Comment that this is really a discussion of expectations and how our expectations influence our behavior.
5. Lead into a discussion of the fact that they have all volunteered to become involved with this course; that they have expectations of you, and that you have expectations of them.
6. Begin by offering to let the group interview you to determine your expectations of the course and of them. Distribute a copy of the Expectations Chart to each participant (a sample follows) and note that some suggestions are listed there if they need some ideas to get started with interviewing you.
7. Once they have completed their interview of you (allow 20 minutes) spend an equal amount of time with you "interviewing" them. Again, use of the flip chart is advised.
8. The remainder of the discussion can center on: a) a comparison of expectations: in what ways do the volunteer co-ordinators and your expectations agree/disagree? How can areas of conflict be resolved? b) an introduction of the notion of a "psychological contract" - that while neither you nor they have signed a legal contract regarding the terms of your relationship there do exist expectations on both sides regarding contributions and payoffs.
   c) discuss the parallel between this situation and the one in which they work with volunteers, in terms of expectations and psychological contracts.
   d) if there is extra time, you may wish to get into a more general discussion of motivation of volunteers (eg: How to)

(NOTE: With slight modifications, this format could be used by the co-ordinators in orientation sessions with volunteers.)

EXPECTATIONS CHART

COURSE CO-ORDINATOR		VOLUNTEER CO-ORDINATORS	
expect to get	expect to contribute	expect to get	expect to contribute

AREAS the participants may want to discuss with the co-ordinator for the course:

- how the co-ordinator evaluates?
- what is the co-ordinator's role?
- what the co-ordinator expects from each volunteer
- what the co-ordinator expects to contribute

11

PURPOSE: To provide co-ordinators with an experience in dealing with a misplaced volunteer.

TIME REQUIRED: 45 minutes

TECHNIQUES USED: Incident Study;
Small Group Discussion

PROCEDURE:

1. Distribute the incident "The Misplaced Volunteer" to all participants and have them spend 15 minutes reading the incident and individually writing answers to the discussion questions.

2. Have the participants divide into small groups (4-5 people per group) and for 20 minutes discuss the questions jointly and attempt to come to some concensus regarding their answers.

3. As a total large group, spend 10 minutes summarizing the answers generated in the small groups, and discussing any questions arising from the discussion.

VARIATION:

As an alternative, before the small group discussion you could have the participants do a role play situation where one person played the volunteer co-ordinator and the other person played Frank and use the conditions under discussion question 1 (a). Then, you could have the participants switch roles, and conduct an interview under the conditions of Discussion Question 1 (b).

THE MISPLACED VOLUNTEER

Dianne Southern was the volunteer co-ordinator at Riverbend Children's Hospital. Over 100 volunteers participated in the volunteer program, working in various departments throughout the hospital. One of the most challenging programs was in the Physical Rehabilitation Department and involved providing recreation opportunities for handicapped children.

Volunteers were involved in the swimming classes held each week in the hospital's pool which was especially designed so that it was five feet deep at all points, and thus well suited for teaching purposes. The volunt-ers always worked with a physiotherapist and were never alone in the pool themselves. In order to be a volunteer with this program, people had to have an instructor's level qualification in swimming.

Dianne had recently placed Frank Garth as a volunteer in the pool program. Frank was an older man who had been a swimming instructor for several years with various public pools and adult swim programs. He was very enthused about teaching people how to swim and now that he was retired, he wanted to devote more time to this. While Frank had never worked with physically handicapped children, his impressive background in instruction caused Dianne to place him in the pool program.

Very shortly, she realized she had made a bad mistake. While Frank was obviously a competent swimmer and knew basic instruction techniques, he was not able to adapt to dealing with the special needs of the children involved; standard techniques were just not adequate, and Frank could not seem to remember what special precautions were needed. In the words of the physiotherapist, "Before long, Frank's going to drown someone!"

DISCUSSION QUESTIONS:

1. Assume you are the volunteer co-ordinator at the hospital. On the basis of the information given, how would you handle the situation:

   (a) assuming there are no other volunteer positions open at the hospital?

   (b) assuming it might be possible for Frank to help with the craft program, but you know Frank would not be as happy there?

2. If you had Dianne Southern's position, how would you handle selection and placement for this program?

3. Are the criteria for the job (i.e., volunteers must have instructor's level qualifications in swimming) appropriate for this type of volunteer position? If so, why? if not, why not? Would you add any additional criteria?

12

PURPOSE: To provide co-ordinators with an exercise on issues involving leadership, planning, communication and relationships with Boards.

TIME REQUIRED: 45 minutes

TECHNIQUES USED: Incident; Small Group Discussion

PROCEDURE:

1. Distribute the incident "Money! Money! Money!" to all participants and have them spend 15 minutes reading it and individually answering the discussion questions.

2. Divide the participants into small groups (4-5 persons per group) and for 20 minutes discuss jointly the questions pertaining the the incident. Have each small group select one person to present a summary of their discussion to the total group.

3. As a large group, spend the remaining time hearing how each small group analyzed the situation and what they would have done to deal with it.

MONEY' MONEY! MONEY!

In December 1973, John Mason the volunteer co-ordinator for the Getwell Hospital, received notice from the hospital administration that because the hospital's budget for the year had been favourable, the committee felt that the volunteers were entitled to share in the benefits and so $500 was allocated to the volunteer program's budget. John Mason earmarked the funds to assist volunteers in covering babysitting expenses.

The following year, the administration committee again found they had a favourable balance in their budget and it was proposed that the volunteer program deserved additional recognition; the committee considered what options were available to show their appreciation. The Chief Accountant, present at the meeting, indicated that $300 of the $500 allocated the previous year was still remaining in the account. On this basis, the Committee decided not to allocate any further funds to the program, but rather to send a letter of appreciation to the volunteer co-ordinator to pass along to the volunteers.

At approximately the same time as this decision was made, John was tabulating the results of a questionnaire he had mailed to all volunteers in the program asking them: Please state your reaction to the babysitting expense allowance available. 90% of the questionnaires were returned. The answers could be classified generally as:

REACTION	%
" I would prefer a transportation allowance"	40%
"My children are in school when I volunteer"	20%
" I don't have any children"	15%
"It has been very helpful; I would not have been able to volunteer without it"	15%
"I didn't know there was a babysitting allowance"	10%

DISCUSSION QUESTIONS:

1. What is your analysis of:
   (a) John Mason's leadership?
   (b) The lines of communication between volunteers and the volunteer co-ordinator? between the co-ordinator and the administration committee?
   (c) The planning process for the volunteer program? For the administration committee?

2. Assume you are the volunteer co-ordinator in the hospital. On the basis of the information given, how would you have handled the situation if $500 was allocated to your program?
   (Include what decisions you would make and what actions, if any, you would take with volunteers, and with the administration committee).

13

PURPOSE: To provide co-ordinators with both exposure to video-equipment and experience in its use as a public relations technique. (NOTE: Access to VTR equipment a prerequisite for this exercise; also it is necessary that the course has already covered the use of VTR so that participants are familiar with the mechanics of operating, or alternatively, one person involved should be proficient in the use of the equipment.) For a variation, refer to the comments at the end of the exercise.

MATERIALS REQUIRED: V.T.R. equipment; tape recorder (optional)

SETTING: To be given as a special project to a small group of participants; their final product to be presented to the class during a following session.

PROCEDURE:

1. Select, on a voluntary basis, a small group of participants (or an individual) interested in preparing a special project.
2. Providing them with access to VTR equipment, have them prepare a video presentation (eg: 30 minute film) which depicts the volunteer programs of one of their organizations. If a tape recorder is available, the small group can have the option of recording a narrative description to accompany the video tape. The group should choose a focus for the film, for example: a film that would be appropriate to use for public relation purposes for the general public; or a film that would be used in orientation sessions for their volunteers.
3. Preferably, the topic of the session at which the film is presented should coincide with the film's focus (i.e., public relations, orientation, etc.)

VARIATIONS:

1. If access to VTR equipment is not readily available, a similar project could be conducted using a slide presentation. (This might necessitate a small expenditure for purchase and processing of film.)
2. Have different small groups use varying techniques (including VTR, slide presentations, visual displays, etc.) and set aside one session for viewing their products.

14

PURPOSE: To provide co-ordinators with experience in general management principles through personal involvement in a problem-solving exercise; to examine individual co-ordinators' management styles.

TECHNIQUES USED: In-Basket Exercise

MATERIALS REQUIRED: A copy of the In-Basket Instruction Sheet and a set of In-Basket Items for each participant; a pad of paper, paper clips, and a pen or pencil for each participant.

TIME REQUIRED: Approximately 2 hours

PROCEDURE:

1. Discuss the goals of the exercise with the group.
2. Distribute a copy of the "In-Basket Instruction Sheet" to each participant; allow the group to read the information and provide answers to any questions about procedure.
3. Distribute a set of In-Basket Items, pad of paper, paper clips and pen to each participant and allow them 45 minutes to individually respond to the items. (NOTE: They may complete the items in any order; they can change their answers.)
4. When the time is up, have the participants form small groups (4-5 persons per group) and ask participants to share their in-basket correspondence, discuss various approaches, and make generalizations about management principles. (Allow 45 minutes.)
5. With the remaining time, lead the entire group in a short summation.

The following list includes some of the issues raised by the items in the In-Basket exercise. This is for your information in promoting discussion, and is not intended to be given to the participants.

re: Request from Bruce Matthews for Placement of Students

This letter is included first to see if participants agree in their action before they know they currently have an excess of volunteers. Then will they come back and change their decision? They really need help on Saturdays - will they think of this?

re: Telephone message from Val Greening regarding resignation

Suggests a serious problem, but how will it be handled? Can she head off the resignation or would this make the problem worse? The phone message is several days old.

re: Request from Business Men's Club for Speaker

Sounds like a good opportunity - not only for P.R. but as a broadening experience for the co-ordinator. Will the co-ordinators offer to bring along a volunteer experienced in some of the programs?

re: Note from Jill Martin

Will the co-ordinators think of passing the compliment on to the volunteer involved? Also, here's the information regarding an excess of volunteers right now.

re: Note from Kathy in the Information Centre

Partly, this involves a question of ethics - the first choice is highly questionable. In addition, the question seems to indicate that there is some confusion over the roles of Kathy and Carolyn regarding volunteers. The second issue raised in the note involves questions of commitment and responsibility common in volunteering - how will the co-ordinators deal with this?

IN-BASKET INSTRUCTION SHEET

This is called an in-basket exercise because your materials are items of correspondence that are waiting for you on your desk. Normally, you do not interact with others by written correspondence but in this exercise, you are under certain time restraints which will be explained below. After you have spent about 45 minutes individually working on the items, you will have an opportunity to get together with a small group of people and discuss your approaches.

The Situation:

Your name is Carolyn Williams, and for the past year you have been the volunteer co-ordinator with Canyon Community Services.

Canyon is a town of 50,000 people in northern B.C. There has always been active participation by the residents in various aspects of the town's development. Slightly over one year ago, a group of citizens including yourself applied to the Secretary of State for a grant to initiate some community projects in the town - included in the grant you received was a position for a full-time co-ordinator; it is this position which you occupy. The Canyon Community Services also houses an information centre (for which you recruit volunteers), a unit from the Department of Human Resources, and various committees formed by residents of the town.

You have been sick at home for over one week; it is now Sunday, October 6, and you decided to come into the office to see what business has arisen with which you must deal. Tomorrow morning, Monday, you are catching a plane to Vancouver where you will attend a training session for co-ordinators until Wednesday evening. You will be back at work on Thursday.

Some of the Staff that Work With You:

Jill Martin: a Department of Human Resources social worker who has been running a youth drop-in centre with some of the local high school teachers.

Kathy Simms: part-time paid co-ordinator of the Information Centre

What You are To Do:

Go through the attached papers and take whatever action on each that you feel is apporpriate. If you decide to write a letter in response to someone, actually write the letter and sign your name to it. If you decide not to handle certain items until your return, state exactly what you will do then. You may complete the items in any order; you may return to an item and change your answer if you wish.

MEMORANDUM OF CALL	DATE: 1/11/74	TIME: 1 p.m.
TO: Carolyn		
[X] You were called by [ ] You were visited by		
Val Greening		
Volunteer		
LEFT THIS MESSAGE:		
She said she phoned to tell you that she has resigned from the Information Center because of the new schedule drawn up.		

C A N Y O N   H I G H   S C H O O L

514 Centre Street   Canyon, British Columbia

October 1, 1975.

Ms. Carolyn Williams
Canyon Community Services
CANYON, B.C.

Dear Ms. Williams:

Although I am new to Canyon, I have heard of how active your volunteer program is, and what a range of experiences you have to offer to potential volunteers.

One of my classes of Grade 11 students is taking an elective course entitled "Perspectives on Living", and I would like to provide some of the students with an opportunity of experiencing the roles that volunteers can play in our town. Would you be able to find placements for some of the students twice a week for two hours each session?

Hoping to hear from you soon so I can proceed with my planning.

Sincerely yours,

Bruce Matthews

Bruce Matthews.

BM/st

CANYON BUSINESS MEN'S CLUB

Canyon British Columbia

September 27, 1975.

Ms. Carolyn Williams
Volunteer Co-Ordinator
Canyon Community Services
CANYON, B.C.

Dear Ms. Williams:

I am writing to you to ask if you would consider speaking at our next luncheon meeting, Thursday noon, October 17th? Our group is interested in various aspects of community involvement in Canyon, and would be interested in hearing about the volunteer program, and the types of projects in which you are involved.

I hope you will accept our invitation and look forward to your reply.

Sincerely yours,

Stan Jenkins.
President.

SJ/st

Friday, Oct. 4

Carolyn,

Just wanted to let you know that Linda James has been doing a terrific job as a volunteer with our youth group. I can see that the kids really like her and she's been very successful at organizing several of the activities with the group.

I remember you saying last week that you've currently got several volunteers waiting to be placed but with no vacancies in your program other than the Saturday ones. I could use one more to help with our youth group. Can we talk about it next week?

Jill

Thursday

Caralyn -

Remember our conversation last week about Louise, the woman you felt might not be too suitable, but you suggested she "sit in" on a couple of sessions in the Information Center? Well, she's just not working out. I know you'll be gone next week so I thought I could handle it in one of three ways:

a) Tell her that our shifts are full right now but I'll call her as soon as a vacancy comes up (and then not call her.)

b) Tell her she's not suitable

c) Let it go and see if she improves.

What do you think?

Also Fran, who volunteers on Tuesday and Thursday mornings, just phoned to say she has a chance to fly to Ottawa for 2 weeks with her husband and won't be in.

Kathy

15

PURPOSE: To provide an exercise dealing with conflict between the volunteer co-ordinator and other staff.

TIME REQUIRED: 45 minutes

TECHNIQUES USED: Incident Study; Small Group Discussion

PROCEDURE:

1. Distribute the incident to all participants and have them spend 15 minutes reading the incident and individually writing answers to the discussion questions.
2. Divide the group into dyads (groups of two), and assign roles of supervisor and volunteer coordinator to the members within each group.
3. Distribute the role-instructions to the groups. After allowing time for each person to read his role and begin to identify with it, give the group 10 minutes to carry out their interview.
4. Have the participants form small groups (4-6 members) and discuss the varying experiences from the interview, which strategies were used, and the answers to the discussion questions.
5. As a total large group, spend the remaining time summarizing the critical issues from the incident, as seen by each small group.

MRS. GREENSIDE'S UNIT

Three weeks ago, Frank Barnes was hired as a volunteer co-ordinator with the Corrections Department and moved into one of their decentralized offices with a unit of probation officers. Frank's position was part of a pilot program underway to recruit and train volunteers to become involved in programs with people on probation.

When Frank was hired, the team of supervisors that interviewed him were enthusiastic about the new volunteer program, felt it had a great deal of potential, and would be an innovative and interesting approach for the Department.

When Frank enquired about the reactions of the probation officers to the new approach, he was told that the program would be welcomed at the branch offices, and that he would have no problem in fitting in.

It didn't take Frank long to realise that nothing could be further from the truth. It was apparent immediately that the unit's supervisor, Mrs. Greenside, had decided that the unit would benefit from a volunteer component; the workers were not consulted - Mrs. Greenside arranged for her unit to be involved in the pilot study.

When the staff discovered plans for a volunteer program, a few of them voiced their objections to "non-professionals getting involved with the clients" and to the increased work load they would face by being forced to deal with volunteers as well as their caseload. The rest of the staff, while not necessarily opposed to such a program, were angry and resentful of the manner in which Mrs. Greenside had arranged for their involvement.

In the first three weeks Frank was at the office, he found that a proportion of the workers became interested in the proposed volunteer program and seemed prepared to become involved, but the majority of workers remained uncommunicative with him.

DISCUSSION QUESTIONS:

1. Should this situation have occurred? Who was responsible for the current predicament?

2. What are Frank Barnes' alternatives?
   a) as short-term strategies
   b) as long-range solutions

   Which options would you choose if you were in Frank's position? Explain your reasons.

MRS. GREENSIDE:

As explained in the incident, you are the supervisor of a unit of probation workers in a decentralized office. You recently arranged for your unit to become involved in a volunteer program that is being run by the Department.

You're sure that this new volunteer program will be valuable, both to the clients on caseloads, and indirectly to the probation officers. However, as you knew that most of the workers would complain that such a program would add to their work, you didn't consult them about it. You know that Frank Barnes has been having a little trouble getting started, but you are sure that everything will be fine soon. You know that the best way to handle the situation is to just "ride it out", and soon things will blow over and everything will be fine.

You know that Frank is coming in to see you now, and he is probably upset with the current situation; you intend to calm him down, let him know that you expected this reaction and that it's just temporary, and he should just ignore it.

However, as you don't want to loose the program, if Frank is demanding enough about wanting to make some changes, you might agree, if it's the only way you can - "smooth the waters" and keep peace - however, you certainly want to avoid taking any action if at all possible.

FRANK BARNES:

As explained in the incident, you are the volunteer co-ordinator, newly assigned to Mrs. Greenside's unit, and you are not finding that the current situation is very satisfactory.

You have arranged a meeting with Mrs. Greenside where you intend to propose some of your "short term strategies" which you have drawn up.

After knowing Mrs. Greenside for three weeks, you are already aware that she has a great tendency to avoid issues and will go to any extent to "smooth over the waters" and keep peace at all costs, so you are not sure that you'll get anywhere with her. However, as she is your supervisor, the two of you must agree on some way of dealing with the situation.

(NOTE: Use the strategies which you drew up to answer Discussion Question 2 as the proposals you want to make to Mrs. Greenside).

16

PURPOSE: To provide co-ordinators with an exercise concerning certain aspects of files and record-keeping in relation to volunteer programs.

SETTING: Exercise to be completed between sessions of the course, with a general follow-up discussion at the following session on the functions and issues involved in record-keeping as well as alternative techniques available.

PROCEDURE:

1. Distribute a copy of the "Manning Table" to each participant, and for the following week have participants complete the table for their own particular volunteer program, using information from the previous month's operation. (NOTE: The manning table is useful only if a large number of volunteers are involved in a program (eg: 70-100); if some participants are involved in smaller programs, refer to the "variations" section for alternative assignments for them.)

FOLLOW-UP:

The following week, discussion on files and record-keeping could include the potential uses of:

a) Registration card or application forms for each volunteer (sample Application Form follows as one example)
b) Job Descriptions for each job category involving volunteers (refer to Exercise #9 for a sample format)
c) Volunteer work-history cards
d) Evaluations by supervisors or staff involved of the volunteer's performance
e) Log Books

Participants could be encouraged to bring samples of their current record-keeping systems to share their ideas with other group members.

Additional topics regarding the functions and issues of record-keeping include:

a) what is important for the agency to know about the volunteer program, and is this the information which is being collected?
b) what role can records have in the evaluation of programs?
c) how much time should be spent on record-keeping?
d) how much information on evaluation of performance is required? should this be confidential? kept under lock and key?

VARIATIONS:

Have some participants completed Manning Table and others experiment with the use of Job Descriptions (refer to Exercise #9 for sample design), Application Forms, etc.

VOLUNTEER APPLICATION FORM

DATE: ______________________

NAME: ______________________ PHONE: ______________________

ADDRESS: ______________________ CHILDREN: NO. ______________

Ages: ______________

SPECIAL INTERESTS: This can include anything from hobbies to former jobs

HAVE YOU VOLUNTEERED BEFORE? ______________________

WHAT WOULD YOU LIKE TO VOLUNTEER TO DO? ______________________

COMMITMENT: 1. How many hours can you commit to volunteer work per week?

2. At what times?

3. Will you be able to continue with your work for at least six months?

LIST ANY SPECIAL QUALIFICATIONS YOU MAY HOLD (eg: drivers license, languages spoken, craft or trade certifications, diplomas, etc.)

HOW DID YOU HEAR ABOUT THIS ORGANIZATION?

MANNING TABLES

Manning tables or staffing schedules can be constructed to summarize the actual and desired number of volunteers for each job category. It is essentially an inventory of manpower. It lists all jobs and indicates the number of volunteers assigned to each job. It also includes an aoutline of the number of volunteers currently active, currently inactive, and currently in-training for each of the categories, as well as other characteristics that may be significant and useful for the particular situation.

MANNING TABLE

FACE SHEET

NAME OF ORGANIZATION:

Address:

Date of Preparation:

Total volunteers registered:	Men	______	Women	______________
- number currently active:		______		______________
- number currently inactive:		______		______________
- number currently in training:		______		______________

Number of New volunteers recruited in the last six months:

Men Women

Projected Total volunteer needs for the next six months: ______________

Difference between number of volunteers actively involved and projected total volunteer needs for the next six months:

Total resignations of volunteers in the last six months:

Reasons:

SIGNATURE:

POSITION:

MANNING TABLE

Job Category	No. of Volunteers Registered			Number Currently			HOURS OF VOLUNTEER INVOLVEMENT IN PROGRAM		PROJECTED NUMBER REQUIRED FOR PROG. FOR NEXT 6 months
	Men	Women	Total	Active	Inactive	In-Training	For the month of ________	For the last six months	
TOTALS:									

17

PURPOSE: To provide an exercise concerned with the delegation of responsibilities as one aspect of a planning function.

TIME REQUIRED: 45 minutes during a session or as an exercise to be completed by participants outside of the sessions for their own information and use.

PROCEDURE:

1. Have participants individually spend five minutes composing a list of "Things I Didn't Have Time to Do in the Past Week which I would have liked to have done or should have done".

2. Then, ask them to set aside their first list and compose a second list, "Things I Did get Done in the Past Week".

3. Distribute one copy of each of the Alternative Approaches charts to the participants and have them list their tasks on the left-hand column and determine if there were any alternative ways the job could have been accomplished.

4. Either with the group as a whole, or in small discussion groups, the participants may:

   a) share their results with one another (eg: tasks which they could have delegated and didn't, etc.)

   b) attempt to develop comprehensive lists of tasks which could be delegated or referred

      - to volunteers
      - to clerical staff
      - to committees
      - to Board of Directors,

      etc.

ALTERNATIVE APPROACHES

CHART 1

Tasks Left Undone	Alternative Ways Task Might Have Been Accomplished					
	Delegate to a Volunteer	Delegate to Clerical Staff	Assign to Committee or Set up Committee to deal with this	Refer to Board of Directors	Other Idea (list)	None of These

ALTERNATIVE APPROACHES

CHART 2

Alternative Ways Task
Might Have Been Accomplished

Tasks Left Undone	Delegate to a Volunteer	Delegate to C Clerical Staff	Assign to Committee or Set up Comit-tee to deal with this	Refer to Board of Directors	Other Idea (list)	None of These

18

PURPOSE: To initiate a discussion on the role of evaluation in volunteer programs.

TIME REQUIRED: 45 minutes, or as an out-of-session assignment

PROCEDURE:

1. Distribute "self study questionnaires" to all the participants (sample copy follows).

2. Allow the participants 15 - 20 minutes to complete the questionnaire on the basis of their current programs.

   (NOTE: Reassure participants that the questionnaires will not be collected, and are merely to serve as a "yardstick" for them in a quick effort at evaluating their program.)

3. As a group discuss:

   a) the role of evaluation in their program

   b) techniques for evaluating, including

      - self-evaluation

      - use of outside consultants

   c) limitations of evaluations

      - eg: sometimes costly, time consuming, alienating, inaccurate

   d) the use of evaluations in planning

SELF STUDY QUESTIONNAIRE

The following questions are to help YOU score yourself on how your program is doing. The questionnaires will not be collected ....rather, they are for your own use. Not all the questions will be equally relevant to you, and there may be some questions which you feel should be added.

Here's one idea - try completing the questionnaire now, filing it away for a time. Then bring it out 6 months or a year from now and score your program again to see how far you have progressed.

Score yourself in the following way:

2 if you are sure that the statement is true for your program

1 if its partly true or you are uncertain

leave a blank if the statement is not true for your program.

PLANNING

The volunteer co-ordinator consults with others to determine where where volunteers are needed ______

You, as volunteer co-ordinator, have plans for objectives you want to accomplish over the next few months ______

Your program has written goals ______

RECRUITMENT, SCREENING, PLACEMENT

Your program has written job descriptions for volunteer positions ______

Specific assignments are available when volunteers are recruited ______

Volunteer recruitment sources are used whenever possible (eg: Volunteer bureaus, etc.) ______

Volunteers are interviewed individually during the screening process ______

Volunteers are interviewed in person at least once before acceptance ______

Volunteers are interviewed twice and often by different people before acceptance ______

As volunteers gain skills they may be reassigned to other volunteer jobs if they so desire ______

ORIENTATION AND TRAINING

Volunteers receive an orientation before starting their job ______

Volunteers receive written volunteer manuals or handbooks during orientation covering areas such as background information on the organization and specific information on the areas in which the volunteers will be working ______

In-service training meetings are held regularly ______

SUPERVISION

The volunteer is directly responsible to a specific staff person for each job ______

Volunteers are in contact with supervisors on a regular basis and receive feedback regarding their performance ______

The volunteer is helped to grow and develop on the job ______

A volunteer's assignment may be changed after a period of time (assuming an evaluation has been done) ______

The volunteer co-ordinator is administratively responsible for all volunteers even though the direct supervision may be through another staff member ______

PROGRAM IN RELATION TO THE STRUCTURE

A portion of the other staff in the organization are involved in the volunteer program (eg: training, supervision, planning,etc) ______

Volunteer service is designed to further the purposes of the organization ______

EXPENSES

A budget is available to cover out-of-pocket expenses for volunteers ______

MOTIVATION

Volunteers are given recognition for their work in some specific way ______

A significant portion of new volunteers are recruited by current volunteers ______

PHYSICAL FACILITIES

There is adequate provision for the personal belongings of the volunteer ______

There is provision for confidential interviews between volunteer and volunteer co-ordinator when necessary ______

RECORDS

Adequate individual records are maintained on each volunteer ______

Written application forms are completed by volunteers and kept on file ______

Regular statistics are kept (eg: number of active volunteers, volunteer hours/month, areas of service, etc.) ______

EVALUATION

Volunteer program is evaluated periodically ______

19

PURPOSE: To explore alternative resources for co-ordinators to use in recruiting volunteers

TIME REQUIRED: 1 hour

TECHNIQUES USED: Brainstorming, Small Group Discussion

PROCEDURE:

1. Have participants spend a few minutes individually writing down one or two major problems they are facing within their own organization concerning recruitment.
2. Discuss the "Brainstorming" technique as described in Exercise 2.
3. Following the general procedure of Exercise 2, divide the participants into small groups, and have the participants spend 15 minutes brainstorming generally OVERUSED and UNDERUSED resources for volunteer recruitment (For example, overused resources mgiht include school counsellors, women's groups from churches, etc; underused resources might include senior citizens, university faculty, etc.)
4. Then, have one participant in each small group volunteer to present his/her own specific problem to the small group. With him/her as recorder, have the small group spend a short time (10 minutes) brainstorming ideas. (NOTE: Remind the recorders not to evaluate or comment on any suggestions from the group at this point) This process of "brainstorming" individual problems can be repeated a number of times.
5. Have participants form one large group again. Post the general brainstorming lists from Step 3, and discuss:
   - reactions of participants who presented problems to the small groups
   - creative recruiting procedures
   - need for salesmanship in recruiting

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PURPOSE: To give volunteer co-ordinators practice in interviewing; specifically, an interview with a potential volunteer as part of a screening process

TIME REQUIRED: 45 minutes

TECHNIQUES USED: Role-Playing;
Small Group Discussion

PROCEDURE:

1. Follow the general format of Exercise 3 (or use as a continuation of Exercise 3), including discussion of Good Interviewing Techniques.

2. After dividing the participants into groups of three, distribute role instructions and copy of the application form to both those designated as volunteers and those who are to be volunteer co-ordinators; distribute observer forms from Exercise 3 to those assigned a role of observer.

3. Proceed with steps 4 and 5 as outlined in Exercise 3.

VOLUNTEER APPLICATION FORM

DATE: Oct 17, 1974

NAME: MRS. Louise Myers

PHONE: 456-7890

ADDRESS: 1410 Downes Ave.

CHILDREN: No. 2

Ages: Grown

SPECIAL INTERESTS: This can include anything from hobbies to former jobs

Craftwork - knitting, sewing, batiking
some pottery, weaving
Bridge

HAVE YOU VOLUNTEERED BEFORE? Yes - the Getwell Hospital

WHAT WOULD YOU LIKE TO VOLUNTEER TO DO? work in the Information Centre.

COMMITMENT:

1. How many hours can you commit to volunteer work per week?
   10-15 hrs.
2. At what times?
   every weekday morning
3. Will you be able to continue with your work for at least six momths?
   Yes

LIST ANY SPECIAL QUALIFICATIONS YOU MAY HOLD (eg: drivers license, languages spoken, craft or trade certifications, diplomas, etc.)

Several craft courses over the past 15 years

HOW DID YOU HEAR ABOUT THIS ORGANIZATION?

Friend

POTENTIAL VOLUNTEER: Louise Myers

You and your husband live in Delwood Community where you have spent the past ten years of your life. Your children grew up here and have now moved away on their own.

Since your children left, you've been very lonely - you find the days long and your husband often works overtime, so you seldom have anyone with whom to talk. You are very talkative by nature; in fact your motto is "There's always time for talking out your troubles". Your husband says you talk too much, but you maintain, "There's no such thing as too much talk".

You haven't worked at all since you were married, and you don't really know what kind of job you could get - although you have considered this and you could use the money.

Instead of seeking employment, last year you tried volunteering with the Getwell Hospital in their craft program, but when you reapplied this fall you found they had stopped using volunteers in that area.

Now, you've heard of the Delwood Information Centre and have put in an application form with the volunteer co-ordinator there. You think that could be just what you need - with an Information Centre there'd be lots of people phoning that you could chat with and talk to.

You are about to have an interview with Gwen Barlow, the volunteer co-ordinator for the Delwood Community Centre, as a result of the application form you completed last week. You figure your best plan is to show her just how much you enjoy talking to people. Gwen Barlow asked for your permission to check with the Getwell Hospital as a reference and you readily consented.

(A COPY OF THE APPLICATION FORM WHICH YOU COMPLETED IS ATTACHED)

VOLUNTEER CO-ORDINATOR: Gwen Barlow

You are the volunteer co-ordinator for Delwood Community Services and your job includes recruiting volunteers for the Delwood Information Centre which is staffed primarily by volunteers from the area. The Information Centre has been getting extremely busy over the past few months - so much, in fact, that they have requested one or two additional volunteers to help them during their busiest times. (There are no other openings available right now for volunteers with your agency).

You have scheduled an interview with Mrs. Louise Myers who completed the attached Volunteer Application Form last week. With Mrs. Myers' approval, you wrote a letter to the volunteer co-ordinator of the Getwell Hospital where Mrs. Myers had been a volunteer and requested an evaluation of Mrs. Myers' work. The letter which you received in reply is also attached.

Your objectives for this interview are:

- to assess Mrs. Myers' suitability as a volunteer for the information centre
- on the basis of your assessment and the information you have, if you decide she is suitable, you will want to let her know that you will arrange an appointment for her with the woman in charge of the Information Centre; if you feel she is unsuitable, you will want to explain why and then try and suggest some alternatives which might be of interest to her.

G E T W E L L   H O S P I T A L

515 Oak Street　　　　　　　　　　　　Delwood, B.C.

December 2, 1975.

Mrs. Gwen Barlow
Volunteer Co-Ordinator
Delwood Community Services
DELWOOD, B.C.

Dear Gwen:

I received your letter requesting information regarding Mrs. Louise Myers, a former volunteer.

Mrs. Myers volunteered at the hospital for three months last year in the craft program. She was very reliable and punctual, and always seemed to enjoy coming to the sessions and talking to the patients. The program was shut down temporarily for a few weeks this fall, so Mrs. Myers did not return as a volunteer although she did indicate she was interested in doing so.

Sincerely yours,

Jane Brownlow.

JB/as　　　　　　　　　　　　Jane Brownlow.