Training Design

Inviting Staff Collaboration in Volunteer Policy and Program Design

Betsy Aldrich Garland, CVA

TITLE: Inviting Staff Collaboration in Policy and Program Design

GROUP, TYPE AND SIZE: The workshop originally was designed for the management staff of a large community mental health center. Subsequently, it was adapted for Directors of Volunteers for their modification and use in a wide variety of agencies and presented at the Association for Volunteer Administration (AVA) Region I Conference in July 1992. Ideal group size can range from 12 to 45 participants.

WORKSHOP LEVEL: Both new and experienced persons have participated in and gained something from this workshop. It satisfies requests for a basic "how to run a volunteer program" presentation as well as a more sophisticated analysis for those who have been in the field for two or more years. It requires that the trainer be fairly well-read and experienced in volunteer administration and leading workshops.

LEARNING OBJECTIVES: The workshop is designed to . . .

1. Assist Directors of Volunteers in designing in-service educational programs for staff in their agencies,
2. Involve agency staff (directly or indirectly) in identifying the needs of the agency, staff, clients, and volunteers, and
3. Solicit staff input in volunteer policy and program design.

TIME REQUIRED: Four hours. However, the workshop has been delivered to experienced directors in a condensed format in one and one-half hours.

MATERIALS: Easel, flip charts (prepared and blank), magic markers, and masking tape. Training packets/handouts for each participant include (1) Statistics on volunteering (use trends compiled by Independent Sector, Points of Light Foundation and/or pertinent articles); (2) Reasons for/answers to poor volunteer-staff relations (see reading list); (3) "Whose Volunteer Program?" (see Appendix A); (4) Case Studies for discussion (see Appendix B); and (5) AVA brochures.

PHYSICAL SETTING: For small groups, participants can sit around a large table with the trainer at one end. For larger groups, try tables in a U-shape or individual tables for six to eight with the trainer at the head of the room. If space allows only auditorium seating, participants will have to cluster in groups in their rows.

WORKSHOP OUTLINE
AND PROCESS
I. *Introduction [Time: 10 minutes]*
  (Note: Establish a climate for the workshop that tells your participants that you are glad that they are here, you are well-prepared for them, and you are looking forward to sharing insights and experience—theirs as well as yours.)

Betsy Aldrich Garland, CVA, has been the Executive Director of Volunteers in Action (VIA), Rhode Island's central recruitment, referral, training and informational center for volunteers and social service agencies, since 1975. She has extensive experience in volunteer program development, consults widely with agencies and service organizations, and writes a weekly newspaper column entitled "Volunteers in Action" in the *Providence Sunday Journal*. She also is Certified in Volunteer Administration.

Welcome participants to the workshop. Introduce the trainer and the trainer's experience and readiness to lead this workshop.

Introduce the group to itself: types of agencies represented, participants' experience in the field, how the workshop has been designed (basic framework for new coordinators, new approaches and resources for veteran coordinators).

Post pre-printed Workshop Objectives and Agenda on the wall and review briefly, clarifying trainer's and participants' expectations.

Call participants' attention to the packet of materials, some for application here, some for reading later.

II. *Starting from Scratch to Build Support* [60 minutes]

(Note: As Directors of Volunteers we often assume that staff share our values when it comes to volunteers and are ready and eager to work with them—and are surprised when staff resist and even sabotage the effort. This section is designed to educate, empower, and woo staff support for the volunteer program.)

Lecturette: Introduce the section with this idea. Early in the planning for establishing a volunteer program, an agency needs to bring its staff into the discussion. In this workshop, participants are invited to assume the role of agency staff in order to learn the value and process of preparing the way for staff to work with volunteers. The keys are to invite, encourage, educate, and respect staff.

A. Invite staff participation.

"I want to invite you to inservice education (or talk with you about the volunteer program) because . . .". Present the ideas below:
1. We need to clarify staff role; the more they know about the volunteer program, the better they will understand how they fit (with you, with the program, with the volunteers).
2. We need staff help in designing a program that will benefit agency, clients, *and staff.*

3. We need staff support. Their attitude can make or break the program.

B. Encourage their reflection.
1. Around tables or in clusters, invite participants, in round-robin fashion, to share: their names, their agencies, "I've been a volunteer at . . .", and one positive and negative personal experience they have had as a volunteer. *(List the four items to be shared on the blackboard or newsprint.)*
2. Ask for feedback from the groups. What kinds of volunteer work (a quick sharing of the range of activities: scouting, church work, trail clearing, hot lines, board service . . .) have staff been involved in?
3. Process their positive and negative reflections from those experiences. List the key ideas in columns on newsprint to give their experiences validity. Accept and summarize all offerings.

For example:

Positive	Negative
Met interesting people	Not enough training
Had fun, gratifying	Lack of challenge
Career development	Taken advantage of
Appreciation	Not accepted by
Impact on others	older volunteers
Free training	

List their ideas. What have they learned from their own experience as volunteers?

C. Educate about volunteers today.
1. Statistics: According to 1990 Gallup Poll, 54% of the adult population volunteers, almost as many men as women. The "baby boomers" are very involved (62%–64%). Employed persons are more likely to volunteer than unemployed. Share these and other statistics (using handouts and your own research) with participants.
2. Implications: Volunteers lead busy lives with multiple demands. Although they have less time available, they have more skills to offer. Reflect

on the significance of your statistics and invite them to share what they are seeing in their agencies.

3. Competition: While there is a renaissance in volunteering (23 percent increase in two years), there are more agencies competing for volunteers. How will participants' agencies get their fair share? *(Hint: by planning well and running a sound volunteer program—what this workshop is all about!)*

D. Respect staff hopes and fears.

It is important to give validity to staff hopes and fears in bringing volunteers into "their" agency. Ask them what they are. They can list them at their tables (or in small buzz groups). Poll the groups and develop a composite list on newsprint.

For example:

Hopes	Fears
Time to interview	*They will take over*
Build slowly	*Too much supervision*
Staff can train	*Undependable*
Ease staff workload	*Liability*
Get to choose volunteers	*Lack of long-term commitment*
	Not qualified

(If you need to "seed" some ideas, refer to the literature on reasons for poor volunteer-staff relations.)

Conclude this section of the workshop by stressing that programs should be designed to fulfill hopes (where realistic) and address fears (in program structure and organization). This is why staff participation is so important.

III. *Identifying Needs [20 minutes]*

Suggested transition: "Successful volunteer programs don't just happen by themselves. They take management, coordination, thoughtfulness, intentionality, money, and. . . . So why bother? Why go to all that work?" Answer: only to meet a real *need* (or needs).

A. Lead participants in identifying today's needs and motives for the agency, the staff, clients, and volun-

teers. Use your table or buzz groups, assigning one of these constituencies to each group.

Ask for feedback from each group and post their ideas in side-by-side columns. After each group has had a chance to share its list, ask if anyone has additional ideas to add to any column.

The finished product might look something like this:

Agency	Staff
credibility	*technical assistance*
new projects	*fresh views*
improved morale	*reduce stress*
fund raising	*clear boundaries*
	augment care
	longer impact
	reduce paperwork

Clients	Volunteers
role models	*experience*
new skills	*self-esteem*
timely service	*resume*
child care	*impact*
more attention	*friends*
	clear tasks

B. Needs Overlap Analysis: Process the exercise, noting the following as well as other points of your own:

1. Effective programs are those where everyone's needs are being met. Where they are not, that constituency (or individual) loses interest.

2. In designing jobs for volunteers, look for ways to serve staff while serving the clients while serving a prospective volunteer. Come up with examples from your own experience.

For example, a busy case worker who can't give enough time and attention to each client might (if you have built the program carefully and strategically) appreciate having a lonely resident of a group home befriended by a volunteer who needs experience working with disabled persons. The agency benefits from expanding staff resources and broadening its community base.

3. The more needs the "players" in the serious game of identifying needs

add to their lists, the more all lists will expand.

For example, an agency video presentation might not have been on the agency's list until a volunteer with a video camera and interest walks through the door looking for a way to put his or her hobby to community use.

4. This exercise sensitizes the staff to the place of the volunteer program in meeting real needs, including their own.

IV. *Soliciting Staff Input in Policy and Program Design [60 minutes]*

A. Sixteen steps in running a volunteer program.
   1. Introduction: All effective volunteer programs have certain basic elements in place—regardless of the particular area of service, mission of the agency, and nature of the program. They can be organized into "steps" although they are not necessarily consecutive. Running a volunteer program can be described more aptly as juggling with 16 balls in the air most of the time.

[The steps (preprinted on 4 x 6 cards) are:
(1) Assess needs
(2) Develop goals & objectives
(3) Set policies
(4) Secure administrative commitment
(5) Develop budget
(6) Designate formal volunteer program coordinator
(7) Provide for good volunteer-staff relations
(8) Prepare record-keeping materials
(9) Design job descriptions
(10) Recruit
(11) Screen, select and assign volunteers
(12) Provide for orientation and training
(13) Arrange for ongoing supervision
(14) Provide for recognition
(15) Evaluate volunteers and volunteer program
(16) Make necessary changes in volunteer program]

2. Group exercise: Distribute a set of cards to table groups (6–10 people) with each of the 16 steps listed on a separate card. Ask each group to organize the cards, although there is no one *right* order, as if they were setting up a volunteer program. (What would you do first, when would you recruit, where do job descriptions fall in the plan . . . ?) The group that finishes first can be invited to post its order on the wall or flip chart for all to see and compare with its own set. *[Note: This is a very effective teaching tool; adults learn from each other's experience while negotiating order and process.]*

3. Invite everyone to circle the room to compare results. Clarify steps that are not familiar to everyone. Involve resident "experts" in the discussion. More experienced participants can assist the trainer by sharing some policies in place, describing what kinds of record-keeping they do, or suggesting ways to recognize volunteers.

B. Whose Volunteer Program?

Suggested transition: The volunteer program does not "belong" to the Director of Volunteers to develop in a vacuum. It is a program of the agency and all its constituencies. Who needs to be involved, in what steps, in what ways?

Individual exercise: Using the "Whose Volunteer Program?" matrix (provided in Appendix B as a sample for your workshop handout), invite the participants to determine who in their organizations needs to be included in what steps. If this workshop is being delivered directly to an agency's staff, in what steps does each staff person want to have opportunity to provide "input"?

V. *Role of the Directors of Volunteers [20–30 minutes]*

Suggested introduction: "If the volunteer program does not "belong" to the

Director of Volunteers, what is his/her role—in the agency, in the program, in the community?"

[Note: the following are new paradigms— new models and patterns—for thinking about the roles and responsibilities of the Director of Volunteers. Present them as ideas for professional round-table discussions, agency think-tanks, and personal self-evaluation. At the end of the lecturette, ask for reflections, comments, whether or not these ring true.]

Lecturette: In the field of volunteer administration, we have moved away from understanding our role as "slot-fillers" to understanding our role as agents of choice and change. This means that the role of the Director of Volunteers has changed accordingly. . . .

A. Directors of Volunteers understand, communicate, and build on the trend toward complexity in organizations.

Do some reading, tap your experience, and interpret for participants the trend toward complexity in organizations, noting such factors as rapid change, increasing community problems, diversity of populations to serve and be served, decreasing funding, the rise of collaborations, the changing nature of the volunteer pool and the immediacy of volunteers' needs. Note also that volunteers are more likely to be woven into the fabric of the agency at every level.

B. Directors of Volunteers serve as the hub of the wheel.

This is a structural responsibility. All organizations need centers in order to hold themselves together, let alone thrive. Boards have presidents; agencies have executive directors; churches and synagogues have ministers and rabbis; families have mothers; and volunteer programs have directors and coordinators.

The Director of Volunteers serves at the center to:

• Hold, sort, and communicate information—job descriptions, recruitment plans, records, training workshop, supervision . . .
• Move the organization and volunteer program toward common goals.
• Bring together people and ideas to lead the organization into the future.
• Provide vision and leadership and encourage the same in others, both paid and volunteer.

C. Directors of Volunteers serve as the "leaven" in the organizational "loaf."

This is a dynamic responsibility. The Director of Volunteers is the catalyst for voluntary action in the organization. S/he does this in three key ways:

1. Seeing: valuing, listening to, and understanding needs of all involved.
2. Calling: recruiting, teaching, creating, developing resources.
3. Sustaining: supporting, recognizing, repositioning volunteers and resources.

Additional idea: The Director of Volunteers is in a unique role because s/he works with and through all constituencies, internal and external, and all layers and departments of institutional life, from board to community volunteer. This is both a special privilege and a special responsibility.

VI. *Applying Learnings [60 minutes]*

Lecturette: Building staff support for volunteers and volunteer programs takes time. Often there is resistance brought about by fear, job stress, lack of participation. Give the program time to develop from the ground up (with approval and resources from the board and executive, of course). Devote time at staff meetings to consider policies and program design. Start with staff who are enthusiastic and let their success convince others.

Case study discussion and analysis:
[Note: Giving staff time to learn about volunteers, discuss their feelings, and build trust in

the program—and the Director of Volunteers—are essential ingredients to its future. Case studies can serve as a vehicle for in-depth discussion, broad-based planning, and consensus-building.]

A. Small group work: Invite participants to reflect on typical situations in volunteer administration. (Three case studies are provided in Appendix A for your use, adaptation, or framework for creating your own.)

B. Hear reports from the small groups. If two or more groups discussed the same cases, consider the different points of view that may have been generated. Invite participants from the general audience to comment and add to the groups' reflections.

VII. *Concluding Comments, Resources* [10 minutes]

In concluding the workshop:

• Review the learning objectives, what was covered, what may still be left undone.

• Invite participants to talk with you personally (if you wish) and to tap the experiences of others in the workshop in developing ad strengthening volunteer programs.

• Suggest materials for further study (e.g., the Suggested Reading List in the handouts), other workshops being offered, resources of the volunteer center.

• Encourage their membership in AVA and AVA's professional certification program.

SUGGESTED READING LIST

Ellis, S. J. (1986). From the Top Down: The Executive Role in Volunteer Program Success. Philadelphia, PA: Energize.
A sophisticated textbook written from the executive director's point of view that should be basic reading for the director of volunteers as well.

Ellis, S. J., and Noyes, K. H. (1981). No Excuses: The Team Approach to Volunteer Management. Philadelphia, PA: Energize.
One of the Volunteer Energy Series, this workbook offers both an internal and external "look" at whom to involve in the team and some excellent "how-tos" and checklists.

McCurley, S., and Vineyard, S. (1986). 101 Ideas for Volunteer Programs. Downers Grove, IL: Heritage Arts Publishing.
The Brainstorm Series, this publication has a helpful analysis in Chapter VI to understanding the dynamics of volunteers-staff relations.

Scheier, I. H. (1972). Orienting Staff to Volunteers. Boulder, CO: National Information Center on Volunteerism.
An old but basic presentation, particularly in understanding staff fears about volunteers.

————. (1988). Staff/Volunteer Relations Collection: Three Guidebooks. Santa Fe, NM: Yellowfire Press. (Recently repackaged and available from Energize, Philadelphia.)
This collection of three offers creative, new approaches to motivation and job design and building staff ownership and support for volunteer programs.

Seita, T. (1990). Leadership Skills for the New Age of Non Profits: Keeping Volunteers Happy in a Changing World. Downers Grove, IL: VM Systems-Heritage Arts Publishing.
Chapter 2, "Developing a Team Approach in Volunteer Programs," has a helpful section on internal advocacy, including "making the case" with top administrators.

Silver, N. (1988). At the Heart: The New Volunteer Challenge to Community Agencies. Pleasanton, CA: Valley Volunteer Center.
Change impacts volunteer programs, too, and this book focuses on today's new volunteers and the need to revamp management systems to accommodate them. Looks at eight issues, such as culture, diversity, and the mass impact of professionalization.

Appendix A
Case Studies for Discussion

Written by Myra Paull, Comunity Counseling Center, Pawtucket, RI, for staff training.
Adapted by VIA.

#1. *Family Service Agency*

A family life program provides families in crisis with a variety of intervention services both in the clients' homes and at the agency. The services include individual, family, and small group programs. The Parent Education group is often sparsely attended: only two or three mothers irregularly attend the six-week series which is intended to teach new skills and strategies for coping with age-appropriate behaviors. Each session lasts one and one-half hours plus preparation time.

The caseworkers are frustrated with the poor turnout and limited impact on their clients. On the other hand, the caseworkers are unwilling to have trained volunteers lead the discussion groups. The program manager is frustrated by the caseworkers' frustration and resistance. . . .

What are the caseworkers' underlying concerns?

What program structures might be necessary?

How should the program manager proceed?

What is the role of the director of volunteers?

#2. *Community Action Program*

The CAP agency has suffered badly with various budget cutbacks, poor fundraising results, and the increase in poverty, unemployment, and neighborhood needs. Unfortunately, the board voted to cut staff even though no program was staffed to the level of the need.

In order to preserve the variety and quantity of services, the Executive Director laid off many of the secretarial/office support staff. The program staff then had to do almost all of their own typing, filing, and other paperwork. When the program staff asked the Executive Director to recruit students and/or volunteers to do more of the office work, the few remaining secretarial staff threatened to leave. . . .

Where does the Executive Director go from here?

When is recruiting volunteers appropriate?

When is it not appropriate?

How can the Executive Director involve volunteers in the office?

#3. *Association for Retarded Citizens*

Jane's client John has been struggling to learn how to manage his checkbook. Some of his difficulty appears to be his limited arithmetic skills and some appears to be his limited ability to remember to write down the amount of the check at the time he writes the check. John is becoming frustrated. Month after month checks bounce and his landlord is beginning to threaten to evict him. Jane's caseload prohibits her from spending more time with John to teach him basic arithmetic, and John refuses to go to "school."

A volunteer, Ed, has begun to spend two hours per week with John, reviewing arithmetic skills and double-checking John's checkbook. Within two months, John's checks stopped bouncing, and John has begun to feel more confident in other life skill areas. Suddenly, Jane recommends that Ed's services to John be terminated. . . .

Why the change in Jane's attitude?

What can Jane's supervisor do?

How should Ed be approached? By whom?

What is the role of the director of volunteers?

Appendix B
Whose Volunteer Program?

Successful volunteer programs provide both for clear assignment of accountability, authority, and responsibility on the one hand and for shared responsibility, input, and consensus on the other. Please indicate below who should be involved in what areas.

	STEPS IN RUNNING A VOLUNTEER PROGRAM	Board	CEO/Ex. Dir.	Dir. of Vols	Dept. Heads	Line Staff	Volunteers	Clients	Funders
PLAN	Assess needs								
	Develop goals & objectives								
	Set policies								
	Secure administrative commitment								
	Develop budget								
ORGANIZE	Designate formal coordinator								
	Provide for good volunteer-staff relations								
	Prepare record-keeping materials								
	Design job descriptions								
STAFF	Recruit								
	Screen, select and assign volunteers								
	Provide for orientation and training								
DIRECT	Arrange for ongoing supervision								
	Provide for recognition								
CONTROL	Evaluate volunteers and volunteer program								
	Make necessary changes in volunteer program								