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VOLUNTEER TRAINING AND DEVELOPMENT: A MANUAL

Revised Edition

A Continuum Book
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To Our Parents

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Preface

This book is a manual designed for those planning to set up volunteer training programs in various types of agencies and organizations; for directors of volunteers who may wish to improve their skills in recruiting, training, and developing volunteers; for boards and committees who may need to develop decision-making and communication skills; and for staff members or supervisors of volunteers who may need to understand better the problem-solving and educational aspects of supervision and the teaching-learning process.

The book is a revision of the earlier edition of *Volunteer Training and Development* (Seabury, 1968), and provides new and updated materials for the training and educational development of volunteers. The content includes greater emphasis on practical workshop topics and case studies for decision-making volunteers (boards and committees) and draws upon a variety of disciplines such as social work and administration as well as adult education. Incorporated in this revision are several sections from the authors' *Learning By The Case Method* (Seabury, 1970), now out of print. In Chapter 6, for example, there is a discussion of participation methods in volunteer learning with particular emphasis on simplified or abbreviated case situations that can be used in a variety of educational settings.

There have been a number of new developments in the voluntary sector since the original publication of this book. The broader interest in volunteer programs throughout the country and the need to support and assist these programs indicated a positive directive for a revised version. The authors have endeavored to reach the personnel involved in this expansion of volunteer service in the courts, correctional institutions, mental health agencies, drug rehabilitation centers, and health care clinics, hy a manual geared to the training needs of traditional volunteers as well as the "new" volunteers such as youth, the elderly, ethnic and other minorities.

The book is meant to be used as a guide in planning and

conducting learning and development programs *for* and *with* volunteers. When a social agency or institution accepts an individual to participate or serve, the agency or institution must ask itself a number of important questions. What guarantee does the volunteer have that his or her service or participation will be effective? What assurance does the volunteer have that time, talent, and skills will be ntilized in a meaningful way? Will the volunteer see a long-range potential for self-development in whatever task is undertaken or service performed? Will the volunteer's good intent be exploited by an uninformed or overly aggressive administration? What positive learning experience will he acquired by virtue of meaningful jobs, by the assignment of real responsibility? Will the volunteer actually become a *participant* in the agency or institution and have an influence on policy and possible social change?

Present and future requirements for the training of volunteers should include consideration for both *knowing* and *doing*. The knowing and doing should not stop at the agency's requirements and specific job responsibilities, but extend further into social attitudes and informed public action. The attitudes of "don't take a chance," and "don't put yourself on record," and "don't get involved or make waves," can be changed by training and learning, by self-development and growth. Knowledge of, and practice in, the skills of understanding individual motivation and group behavior, and in diagnosing community needs and related social problems can be studied and learned.

Decision-making volunteers, such as board and committee members, may find themselves examining agency goals and community programs as a result of such training programs and should be alert, therefore, to the implications of an increasingly informed and concerned constituency. The development of qualified and effective constituents—program or service volunteers as well as future officers, trustees, board members—should be the objective of agencies that desire to improve the active participation of their members in the decades ahead. The collaborative effort of volunteer administrative and professional administrative leadership, for example, should be in itself a positive learning experience. In many cases, however, the collaborative effort still remains a remote goal for many agencies and organizations. The role of the board may appear undefined because of inadequate communication between staff and board; or the work of program or service volunteers defined only in terms of an annual fund drive or a

name on a mailing list. What does this imply? Is there any significance here for future training and development programs?

The content and point of view expressed in this manual represent the composite experience of the authors who, over a period of years, have had a wide background of participation and leadership in voluntary and community organizations, both national and international. The book contains nine chapters with working tools and guides, and should prove helpful to those engaged in, or responsible for, the training and development of volunteers in community groups, social agencies, membership organizations, and civic associations. The various outlines, checklists, worksheets, and charts are designed so that readers may revise and adapt as appropriate for their respective needs and priorities.

There is much to challenge the members and leaders of our multitudinous community organizations and voluntary groups in this age of social unrest and civic ferment. Training for effective participation in the affairs of the community, and for true commitment to the welfare of its people, depends in large part upon the individual's growth toward self-actualization and creative participation in learning experiences. These are the priceless ingredients of an informed citizenry and a viable democracy.

CHAPTER

1

Volunteers for a better community

> Can there be a humane society without volunteers? Can there be a democratic society without voluntary action? Can there be a free society without voluntarism? I think not.
>
> —LEO PERLIS*

Organized volunteer effort has a long history in the United States. After his visit here in 1831–32, the Frenchman Alexis de Tocqueville made these observations:

> Americans of all ages, all conditions, and all dispositions, constantly form associations. They have not only commercial and manufacturing companies in which all take part, but associations of a thousand other kinds—religious, moral, serious, futile, extensive or restricted, enormous or diminutive. The Americans make associations to give entertainment, to found establishments for education, to build inns, to construct churches, to diffuse books, to send missionaries to the antipodes; and in this manner they found hospitals, prisons, and schools. If it be proposed to advance some truth or to foster some feeling by the encouragement of a great example, they form a society . . . and I have often admired the extreme skill with which the inhabitants of the United States succeed in proposing a common object to the exertions of a great many men, and in getting them voluntarily to pursue it.[1]

*National Director, AFL–CIO Department of Community Services, *Voluntary Action News*, September/October, 1974.

Since the days of de Tocqueville, the volunteer movement in the United States has continued to grow and expand; it is still characterized by many of the same features which he observed. ". . . to downgrade and condemn the volunteer is to downgrade our best instincts and to condemn our free society"; so ends Mr. Perlis' article which also includes an excerpt from the de Tocqueville quote and asserts that the role of the volunteer is undergoing changes and needs to be studied in its impact on the American way of life.

WHAT IS THE VOLUNTEER ROLE?

"The traditional role, of course, is one of giving—the giving of one's self to one's fellowmen. It is the giving of time, money, and human effort—without compensation."[2]

"Volunteer Service is a chance to realize one's potentialities, by giving of oneself as one human being to another."[3]

Volunteers "keep Democracy alive. They epitomize freedom and are to our society what the Bill of Rights is to the Constitution which governs us. The health of a democratic society may be measured in terms of the quality of services rendered by citizens who act 'in obedience to the unenforceable'."[4]

"In a sense [volunteers] were the keepers of the public conscience, dedicated to the amelioration of human suffering and the righting of human wrong."[5]

A recent article, "Research and Communication Needs in Voluntary Action," suggests a classification scheme of five types with a number of subdivisions according to their goals:

1. Service-oriented voluntarism, dedicated to helping others or doing things for others.
2. Issue-oriented or cause-oriented voluntarism directed at some kind of public issue, often advocating substantial forms of change in our society or world.
3. Consummatory/self-expressive voluntarism, aimed at enjoyment of activities for their own sake and for self-realization, often in the field of arts, sports, and recreation.
4. Occupational/self-interest voluntarism in labor, business, and professional groups.
5. Philanthropic/funding voluntarism, aimed at raising and/or distributing funds to nonprofit and voluntary organizations of all kinds in the areas of health, education, welfare, religion, environment, politics.

The dividing lines between these five categories are not rigid, especially between the consummatory/self-expressive type and each of the four others, in spite of the fact that persons in this group may not always consider themselves as volunteers, but rather as members of a voluntary club or organization. The author believes that some degree of personal satisfaction is a right of every volunteer and one of the keys to volunteer effectiveness.[6]

Five Different Dimensions of Volunteering

1. The volunteer is not a career worker. He or she can usually decide how much time to give to an organization, project, or cause. Many volunteers, especially in leadership positions or working in organizations without any paid help, regularly give many hours, often every day, to a cause in which they believe. However, they do so out of their own free will and for as long as they are willing to do so or until the term of office for which they were elected or appointed expires.

2. The volunteers do not receive salary, wages, or honorarium for their services. They may receive some reimbursement for "out of pocket expenses"—transportation, meals, fees for attendance at a conference or training session. In case they do not receive such reimbursement, they may declare such expenditures for federal income tax purposes. Similarly, as a tax write-off, businesses and industries give time off to executives and line employees to engage in community service activities; for example, to act as loan executives in United Way campaigns. None of this, however, means payment for service rendered. This principle applies also to the modest remuneration saved for Peace Corps volunteers during their period of service, and allowances for expenses in other volunteer programs.

3. The volunteer has a different kind of responsibility than a staff member where one is employed. Once decisions and broad policy have been determined by the volunteer leadership group, an elected officer or appointed chairperson share the responsibility for implementation with other officers and with the employed secretary or executive director; the volunteer as an individual cannot be held accountable for program and management except as stated in the bylaws of the organization.

Volunteers giving direct service, for example, in the health and welfare field, are responsible for a limited task, while a professionally trained nurse or social worker has the overall responsibility and directs the work. In the recreation/informal-education field,

on the other hand, a volunteer may carry a great deal of independent responsibility as a group leader or adviser, instructor or supervisor of other volunteers, or as director of a special project.

4. The volunteer has a different kind of preparation for his or her volunteer service than for a career or trade, in contrast to a paid employee who must meet specifically stated qualifications in education and experience for this position. Volunteer activity is an avocation, as in the case of a fireman teaching first aid to a youth group; he needs help from the group's adult adviser on how to share a small part of all he knows about first aid with the youngsters. Sometimes the volunteer is a "layman" in regard to the volunteer work, but does need very definite qualifications; for example, a friendly visitor for a welfare agency or a Scout leader. At other times, the volunteer task as such does not require special skill and anyone can learn the job by actually doing it.

5. The volunteer has a different identification with the organization and community than the career worker who may be promoted into positions with other agencies or other localities in the interest of professional advancement. Most volunteers think of the goals and services of the organization or agency first and of their specific activity in it afterwards. The volunteer is more likely to move into different positions or offices within an organization. This applies whether the individual is a member of an organization ("membership volunteer") or a "volunteer worker" donating time and talent where he is needed.

Responsibilities and Positions of Volunteers

There are many ways of categorizing the multitude of activities of the individual volunteer. Volunteers in various settings may be differentiated, for example, according to their functions:

- *decision-making volunteers* who donate their time to leadership tasks as officers, board members, committee or commission members; they may be elected or appointed.
- *program or service volunteers* who give their time to activity tasks such as help with group program, person-to-person contacts, social affairs, clerical work; sometimes they are a separate group and sometimes they are drawn from the membership of an organization and are entitled to an opportunity for more or less active participation in the program of an organization and to a voice in deciding what the program will be. They have the privilege of voting for officers or delegates and may be eligible for elective office.

The following lists (on pages 5–9) show the variety of volunteer opportunities in two different agencies.

Other large organizations with extensive volunteer departments, such as the Red Cross, have similar inventories.

Smaller membership organizations and community groups, with the purpose not of providing a direct service to other people but of carrying out a program of membership education or community action, do not have volunteer departments as such. They must find other ways of providing an opportunity for active participation of their membership through well-planned and carefully scheduled meetings, written communications, meaningful committee structure, sound procedures for election of officers, involving members in planning and carrying out special events such as special programs, social affairs, fund drives, mass mailings. These groups would benefit from carefully planning a division of work for their many regular and special jobs.

The Voluntary Organization and the Volunteer

Voluntary organizations, regardless of size, have a double responsibility: to provide a service or further a cause for community betterment and to provide the opportunity for their members or volunteers to have a share in accomplishing this purpose by helping directly or indirectly with the program.

VOLUNTEER JOB CLASSIFICATION IN A SOCIAL AGENCY[7]

This classification sheet is adapted from one used in a large public welfare agency with separate departments. Not all departments need the same kind of volunteer help. On the sheet provided, staff and committee of the overall volunteer services work with an overview.

	Department Where Applicable						
	A	B	C	D	E	F	G
I. *Group Leaders:*							
A. Pre-School							
B. Children							
C. Adults							

II. *Direct Personal Service Aide:*
- A. Infant and Baby Care Aide
- B. Diet Aide
- C. Beautician
- D. Gray Lady
- E. Nurses' Aide
- F. Health Aide
- G. Physical Therapy Aide
- H. Driver-Observer
- I. Occupational Therapy Aide

III. *Volunteer Visitor:*
- A. In Community
- B. In Institution

IV. *Clerical Aide:*
- A. Office Work

V. *Administrative Aide:*
- A. Committees
- B. Volunteer Departments
- C. Camp

VI. *Case Aides:*

VII. *Sponsors:*

VIII. *Educational Aides:*
- A. Library
- B. Tutor
- C. Nutrition Aide

IX. *Volunteer-Group Occasional Service:*
- A. Donor
- B. Parties
- C. Cottage Adoption
- D. Special Projects

VOLUNTEER JOB LISTING IN A HOSPITAL[8]

(1) — Morning
(2) — Afternoon
(3) — Evening

ADMISSIONS (2) — escort newly admitted patients to their rooms.

CENTRAL SERVICE (1–2)	assist in distribution and collection of materials, equipment, and supplies; sterilizing; folding.
CHILDREN'S CORNER (2–3)	supervising children under the age of 14.
CLERICAL WORK (1–2)	on a regular or PRN ("as needed") basis in such areas as Business Office, Medical Records, Copy Center, Volunteer Department, Chaplains Office, Social Service, and Administrative Offices.
CLINICS (1–2–3)	assist in the OB, Family Planning, and Well Baby Clinics as needed under the direction of the nurse in charge.
*EMERGENCY—OUTPATIENT (1–3)	serve as a hostess in the waiting room and to assist with other duties as directed by head nurse.
FLOWERS (2)	care for flowers in patient rooms—deliver new flowers.
FLOWER STALL (1–2–3)	sell, arrange, become designers in the Flower Stall.
FOOD SERVICE (1–2)	pass and collect general menus —pass mid-meal nourishments.
GIFT CART (2)	sell gift shop items to patients in their rooms.
GIFT SHOP (1–2–3)	sell gift shop items and cashier for the snack shop and decorate display windows.
HEALTH SCIENCE LIBRARY (1–2)	assist librarians as needed.
INFANT PHOTO (2)	take orders for baby pictures.
INFORMATION DESK (1–2–3)	give room numbers and assist visitors.

*The requirements and training for these areas are essentially the same, and we plan to staff them with the same volunteers.

LIBRARY CART (2)	provide interesting reading material to the patients.
MAIL (1)	sort and deliver patient mail.
NURSING SERVICE (1–2)	work under the direction of the Nursing Service Teen Volunteer Supervisor, performing duties she feels will help the patients directly or indirectly.
OCCUPATIONAL THERAPY (1–2)	provide diversional and recreational therapy under the supervision of the therapist.
PATIENT VISITOR (1–2–3) (Nursing Service)	visit with the patients, write letters, read, run errands, and other duties as directed by the head nurse.
PEDIATRIC ORIENTATION (2)	explain hospital admission and other procedures to first grade children and their parents. Consists of role-playing by both students and hospital personnel.
PHARMACY (1)	assist pharmacist as needed.
PHYSICAL THERAPY (1)	assist as needed under the direct guidance of the Physical Therapy staff.
PSYCHIATRIC (1–2–3)	assist nursing staff, Occupational and Recreational Therapists with patients—playing games, bowling, swimming, helping with craft work, beauty shop, visiting, etc.
RADIOLOGY (1–2)	greet inpatients and outpatients and fill needs of waiting patients. Help supervise children's area.
RECREATION CART (1–2)	provide diversional therapy for patients.

RECREATIONAL THERAPY	assist Recreational Therapist in various programs throughout the hospital—6-West, Peds, etc.
REHABILITATION VAN SERVICE (1–2–3)	transporting Rehab patients to and from the hospital for therapy or outside patient activities.
SEWING (1–2)	done in the hospital by individuals or groups.
SHELTERED WORKSHOP	assist physically handicapped clients from the workshop to and from the cafeteria for lunch.
SOCIAL SERVICE	as related to Stroke Club and Sheltered Workshop.
*SURGICAL WAITING ROOM (1–2)	serve as communication link between the operating and recovery areas and the patient's relatives. Hostess.
TOURS (1–2)	escort outside groups or organizations on a tour to acquaint them with the hospital.
VOLUNTEER SERVICE POOL (1–2)	provide escort, messenger, or other services for any department as needed.
WHEELCHAIR TOUR (2)	escort patients on wheelchair tours to acquaint them with the hospital.
YOUTH DEPARTMENT (1–2)	playroom recreation, assist with feeding, work with children confined to bed in pediatrics and the teen unit.

*The requirements and training for these areas are essentially the same, and we plan to staff them with the same volunteers.

This opportunity for involvement and participation is not used by a large number of the people: some belong to many organizations by lending their name or giving financial support only, often because their active participation is not requested. Others belong to no volunteer group for a number of reasons: they are disappointed because of some previous experience; they think they are not wanted because they lack social prestige, economic affluency, special skills, or educational background.

Some do not know that there are a variety of groups in every community that depend on the joint efforts of people to achieve their respective purpose; others may not realize that these groups are not "using" volunteers or "requiring the unpaid work" of volunteers primarily because of budget or personnel limitations. When social agencies, for example, work with volunteers, "it is not merely to add manpower, but also to strengthen the sense of responsibility which we all should have for each other; for important to our democracy is a concern for responsibility as well as for rights. . . . The voluntary organization is a channel through which the dignity of the individual, his rights and responsibilities can be beard and influence felt on matters pertaining to social policy."[9]

Voluntary groups engage in a great *variety of activities:* educational, recreational, and social programs, social and political action, fund raising, publicity, operating a service, or supporting an issue. Many organizations operate through a combination of activities and much of their work is done in groups, large and small, with meetings limited to their membership or open to the public.

Their *organizational structure* may contain one or more of a variety of patterns. Different types of associations are: corporations, clubs, boards, commissions, and councils, varying in size from a local club to a large national organization with regional, state, district, local, and neighborhood branches, with varying degrees of autonomy in the smaller units. Sometimes there are different kinds of membership: active, associate, and supporting or sustaining. The administrative leadership group may derive its authority from the total membership body or from delegates, elected by and accountable to their constituents. Membership organizations usually derive part or all of their income from membership fees. Additional funds may come from a variety of sources: federated financing, foundations, government grants, and private contributions.

Many organizations have an *employed staff,* but it must be remembered that every voluntary association in the United States,

however large and well staffed today, had its beginning through the efforts of some individuals who voluntarily joined together to engage in some common endeavor; which in today's complex society may require the assistance of full-time professional and clerical workers in order to provide an adequate program for members, patrons, patients, or clients.

THE PUBLIC AGENCY AND THE VOLUNTEER

Citizen volunteers have been involved in the public sector of society since the days of town meetings. They served on policy-making bodies, as members of school boards, and many other elected or appointed commissions. Since the mid nineteen hundreds, urban renewal and many antipoverty programs legally require that there be some local citizen participation in these federally financed government programs, with emphasis on "feasible maximum participation" in decision making and direct service roles from the recipients and beneficiaries of the particular project.

- Hundreds of thousands of anonymous Americans have given help to the antipoverty programs. They are providing toys and trips for Head Start children, weekend hospitality for Job Corps enrollees; they are serving in countless neighborhood educational and recreational programs;[10]
- Women in Community Service (WICS)—composed of members of the National Council of Catholic Women, National Council of Jewish Women, National Council of Negro Women, and the United Church Women—worked with the Office of Economic Opportunity in recruiting and screening girls 16–21 years of age for the Women's Job Corps. Teams of women all over the country interviewed girls, talked with their parents, interpreted the Job Corps program to the community, and developed new programs for girls either ineligible or waiting to go to a center;
- School Volunteers give reading help, tutor English as a second language to foreign-speaking children and adults, assist in music, drama, art, and tutor in other academic subjects in many public as well as private school systems around the country.

There are basic similarities in the board member function of public and voluntary bodies. Boards function within the authority given them by law or stated in the organizational constitution, bylaws, or articles of incorporation; they are accountable to the

public which provides funding through taxation or voluntary giving; their role is policy making, not management, which is done by a staff member—director, executive secretary, superintendent —in whose selection the board or commission usually participates in varying degrees, sometimes directly, at other times through establishing personnel policies and procedures.

CURRENT TRENDS IN VOLUNTEERISM AND VOLUNTEERING

In 1966, Wilbur J. Cohen, then Under Secretary in the United States Department of Health, Education, and Welfare listed "ten top community problems that volunteers can do something about."[11]

- hungry children
- children needing medical care
- children needing adoptive and foster homes
- neglected and abused children
- the mentally retarded
- educationally deprived children
- the "unemployable"
- the aged
- discrimination—especially in employment and housing
- the need for greater community participation

It is significant that these same problems are still with us ten years later as we look at the United States and world community. In the field of child welfare, millions of children in the poverty pockets of our own country and in the less developed countries of Asia and Africa are hungry and severely undernourished; world hunger has become a front page headline item. Child abuse and neglect has only recently been recognized as a very serious social problem, the scope of which is not measurable due to still inadequate reporting procedures, in spite of stricter laws in many states. Older, physically or mentally handicapped, and racially mixed children in this country are in great need of adoptive or foster homes, as are orphans in many parts of the world. Local school districts, especially in southern, central and midwestern states have very limited special education programs for educationally disadvantaged children—and adults—and for children with physical or mental disabilities. The increasing unemployment rate hits the unskilled worker most and automation creates more "unemployables." In spite of many municipal and state Human Rights

Commissions, there is still discrimination in housing and employment on the basis of race and sex; and inflation as well as "agism" adds to the many problems of our growing elderly population (21.8 million or 10.3 percent in July 1974, an increase of 486,000 since July 1973 according to a Census Bureau report released in Washington in February 1975).

Mr. Cohen's last item—the need for greater community participation—ties in with his list of specific methods by which volunteers could help alleviate these problems:

- encourage local and state officials to make improvements in existing programs utilizing federal aid;
- spearhead community campaigns to increase public understanding of the problem;
- work with existing public or voluntary organizations in direct service, especially with individuals;
- aid with or initiate surveys to discover unmet needs or gaps in ongoing programs;
- help establish new programs and coordinate the work of groups in given areas.

These methods suggest both individual volunteer activity and voluntary group approaches by existing or newly formed organizations. They also suggest cooperation among volunteers, old and young, voluntary groups, and the different levels of government in both rural and urban settings—and a great emphasis on working *with* rather than *for* people.

In addition there are new self-help groups influenced to some extent by the civil rights and feminist movements of the 1960s. Examples are Parents Anonymous, helping each other to overcome compulsive child abuse; Welfare Rights organizations of public assistance recipients; and groups of the elderly, such as Associated Groups of the Elderly, concerned with legislative programs on a local and state basis, Grey Panthers, and Senior Citizen Councils. Citizen groups to join efforts for alleviating other social problems—such as environmental pollution, consumer concerns, etc.—are numerous.

Specifically concerned with advising on use of federal funds were four committees of 14–16 volunteers appointed by the mayor of a medium-sized Midwestern city to provide priorities and guidelines regarding first year use of community-development money. "The independence and eagerness of the committees impressed planners and councilmen so much that their work has been extended . . . (to) looking at a proposed zoning ordinance and zoning district

map. Later they'll look at the city's capital improvement plan and they will also be involved in deciding how to spend federal revenue sharing money."[12]

Trained volunteers are staffing telephones at rape crisis lines, youth crisis centers dealing with problems of pregnancy, drugs, V. D., and in an information and referral service for the elderly working with over 200 volunteers in 77 small to medium-sized communities supervised by an Area Agency on Aging.

Volunteers work as tutors in Adult Basic Education programs, as court watchers, as adult friends to juvenile delinquents (extending the work of juvenile probation officers), as big brothers or big sisters to children of low-income families.

Among new private organizations furthering the volunteer movement on a national scale are the National Center for Voluntary Action, with local centers in many communities serving as clearing houses for promotional and educational materials; and the Association of Voluntary Action Scholars, concerned with basic and applied research on voluntarism; and groups interested in volunteer activity in specific fields such as the National School Volunteer Program, the National Information Center on Volunteers in Courts and Correctional Systems, and Volunteers in Probation—all providing program and training materials and conducting conferences.

On the level of the federal government, the Peace Corps Program of the 1960s has come under the management of ACTION, an agency also administering student volunteer programs on college campuses and in high schools; Volunteers in Service to America (Vista or the domestic peace corps program) and several programs for retirees which provide stipends or assistance with expenses for participating volunteers: The Foster Grand Parents Program limited to low-income volunteers working with children in institutions; the Retired Senior Volunteer Program (RSVP) with volunteers working in a variety of nonprofit agencies; the Service Corps of Retired Executives (Score), and the Action Corps of Executives (Ace) to assist small businesses. ACTION is also responsible for the University Year for Action (UYA), providing grants to universities and colleges for the development and supervision of full-time student volunteers in poverty-related projects; participants receive a living allowance as well as academic credit.

These and many other volunteer opportunities show clearly that today's volunteers are male and female, young and old, skilled and unskilled, representing low-income and well-off persons, filling both program or direct service and decision making or action roles

in traditional agencies and new programs. Young people in college and high school continue many service projects sponsored by Scouts, Y's, or Red Cross. In addition, educational institutions are providing academically supervised volunteer activities for career exploration purposes and as internships or course-related field experiences, with or without academic credit. Local voluntary action centers often have youth advisory council or boards with representatives from junior and senior high schools helping with planning of and recruitment for youth volunteer programs, while colleges and universities operate volunteer service centers, often run by student volunteers. A unique program at Yale University Law School involves "contracting out student volunteers to research and draft actual legislation to be presented to the state legislature . . . the students have contributed to bills dealing with such vital state business as taxes, education, narcotics, wire tapping, and justice. Both students and legislators profit from the collaboration."[13]

Men volunteers, placed by a voluntary action center included "A night bank security guard (who) offers some of his off-duty time to visit the elderly; a fork-lift operator on the swing shift . . . gives some of his available time to tutor in an inner-city school and to give tours at the Science Center to groups of school children; a young pre-veterinary medicine student gives one of his free evenings (Friday at that!) to teach swimming to Boys Club members."[14]

The American Foundation for the Blind promotes volunteer programs for the visually handicapped volunteer with the objective "to integrate all blind people into the community fabric so that they can be just people" participating for example in some of the federally sponsored programs for senior volunteers.[15]

SOME ANSWERS TO CRITICISMS OF VOLUNTEERING

An even more recent trend is the current controversy about voluntarism itself, coming from several directions as these statements indicate:

- Voluntarism seen as no cure for social ills[16]
- Volunteerism a threat to full employment[17]
- The volunteer system reinforces economic dependence of a woman. . . . Volunteerism has served to give women an illusion of participation in the world at large[18]

The first statement is the headline of an article by a task force

of a local chapter of the National Organization for Women. It accuses the federal government under the former president of encouraging the institutionalization and bureaucratization of voluntary activities while cutting down on spending for essential social programs. "Were it not for volunteerism, society would be forced into paying for needed services and could therefore require qualified people to run them."[19]

The authors first of all object to the insinuation that volunteers are generally less qualified than paid workers. As discussed in subsequent chapters, volunteers must be carefully selected and trained for their specific roles and should not be placed into positions for which they are not qualified. "Society" is not likely to come forth with additional tax and voluntary dollars unless citizens (volunteers) raise their voices and exercise their influence on legislators and community leaders. Volunteer activity provides firsthand acquaintance with the problems of the poor, the elderly, the handicapped, and other disadvantaged groups in the population and, therefore, a basis for advocacy and action on their behalf. It is shortsighted and unfair to blame past and present priorities in federal spending—which favor national defense over human services—on the volunteer movement.

Further, it has been a basic principle of volunteerism that the volunteer worker supplements, supports, and enriches the work of the professional and never replaces a potential paid staff member. It is regrettable that some organizations of professional workers such as teachers' groups view volunteers as a threat to their careers and their security. "A volunteer is many things . . . an extra pair of hands, an extra measure of personal warmth, a valuable special resource for classroom enrichment, a bridge between the instructional program and the community."[20] A classroom volunteer aide does not change the teacher-pupil ratio in a school and an increasing number of teachers recognize the value of help from a friendly, sympathetic adult who can give exclusive individual attention to a child who needs it and who also reduces the amount of noninstructional tasks done by a teacher.

As noted above, the present day volunteer group is no longer primarily middle-aged, middle class, and female. It is the allegation of the National Organization for Women and other women's groups that women volunteers give direct service in public and voluntary organizations which are directed and managed by men, since our society is still male-oriented and male-dominated. To work without remuneration allegedly perpetuates the class difference between the lady bountiful type of volunteer who can afford

to practice charity, and the employed woman who needs to support herself and often her family; this, it is claimed, is an important factor in the resentment of the professional (female) toward the volunteer worker (female). On the other hand, it is argued, to work without pay is undignified; it makes women unpaid community servants.

How to help staff and volunteers to work together as team members and partners through training and development of both groups will be discussed throughout this book. "But to equate one's personhood with a paycheck is dangerous nonsense" says another woman leader. "Many of us resent the measurement of our personhood and our skills in terms of market value. . . . We will not be misled into believing our only value lies in our earning power."[21] In addition, the time men and women spend on their jobs is decreasing with earlier retirement and shorter working hours and should allow greater opportunity and desire for community activity. "Is your job less fulfilling than you expect? Does your job provide good pay but little inner satisfaction? If so, we can help. Fulfillment and satisfaction can be yours by helping and working with others";[22] so reads an advertisement of a local voluntary action center listing volunteer openings of interest to men and women.

Finally, decision making and program or service volunteers are not and cannot be as far apart and as sharply divided, particularly along sex lines, as claimed. The authors believe that activity volunteers must be helped to see the total picture of agency and community, and decision makers must share in the activities involved in planning and policymaking. In other words, BOTH can be service and change oriented. That many more women are needed in leadership roles—on agency boards, public commissions, in the legislatures, in the higher echelons of the community power structure—is obvious; leadership training and development, including recruitment of men and women with qualifications and personal potential, is needed, especially for nominating and selections committees, and for boards and executives, on how to recognize and develop volunteer leadership.

Educational Needs of All Volunteers Today and Tomorrow

The authors suggest that the educational needs of all volunteers, those in community agencies and in membership organizations, service oriented or action oriented, are very similar.

If voluntarism in the United States is to remain "the college for

citizen participation" in community and country, all volunteers need more commitment to and understanding of the purpose and activities in the total program, plus more utilization of their interests, skills, and potentials.

- They must be helped to see their help or membership in an organization as community betterment rather than narrow concern for the job only.
- Preparation for teamwork and participation in group discussion, decision, and action must be included in the learning experience. It is particularly important to help volunteers who serve on any delegate body of their own organization, or represent their group in some council, or other coordinating or planning body in the larger community: the educational program must deal with the question of organizational loyalty and volunteer leadership development within and outside of the organization so that conflicts of loyalty and overburdening with too many different responsibilities are minimized or avoided.
- Since the "new" volunteer may be older or younger, more highly educated or much less educated, with or without vocational or professional experience, currently employed or either retired or not working at all, much more individualized planning of content and method of the educational program is essential. Such educational planning must be based on sound educational theory on how people learn best, on principles of supervision in social work including educational guidance and counseling, and on the social psychology of groups. Rather than "training" people for specific "tasks," the goal is education for change in skills, knowledge, and understanding, and for creative application of learning in new situations (transfer of learning). Such an educational program benefits both the individual and the organization in ways such as these:

—better attendance at and more active participation in the group's meetings and events;
—more competence, satisfaction and, therefore, longer tenure of volunteer workers and organizational members, including those volunteers doing relatively unskilled jobs;
—better interpretation of the agency's aims and activities to the public;
—more support (including financial contribution) to the organization or to the United Way.

Any planned effort on the part of the leadership—elected, ap-

pointed, or employed—of an agency to help members or volunteers participate more effectively, therefore, is considered "training and development of volunteers" for the purpose of this book. People may have joined the group originally for any number of reasons, ranging from a casual interest or doing a favor for a friend, to a deep commitment to the group's cause and program. Regardless of the original incentive for becoming a member or signing up as a volunteer, this initial step is based on some degree of personal interest, some desire to contribute money, time, or talent. Maintaining, broadening, and deepening this interest through working with others toward personal fulfillment seldom occurs automatically. It happens when the leadership group desires it and makes some plans for sharing responsibility, seeking opinions, involving those affected by the results of a decision in the decision-making process, helping people to participate, informing the membership of progress and problems within the total organization.

How can groups plan to increase the involvement and participation of members and volunteers rather than "using people" to approve decisions, pay dues, or provide willing hands or feet to roll bandages, put out a mass mailing, or walk a picket line?

The basic condition is an attitude with concern for ideas, opinions, interests, and abilities of people on the part of a chairman of a board or committee, the officers of an organization, the people in charge of a program or project working with volunteer assistance, especially a director or coordinator of volunteers employed by a hospital, institution, or voluntary organization. These leaders have at their disposal a great variety of methods by which volunteers can be helped to learn about the organization and grow on the job. Such volunteer education can take place in formal or informal settings; it can be designed for individuals or groups; it can be offered within one organization or cooperatively on a community basis, sometimes in conjunction with an educational institution. For the individual volunteer it can be either a pre-service training course, attendance at which is required or at least expected, and completion of which makes him a "trained volunteer." Or it can be a continuing process with many different learning opportunities within a definite but flexible plan. The authors believe in the idea of such a continuous training-learning experience —through a creative cycle of planning, doing, and evaluating—and in the responsibility of leaders in *every* agency, organization, or institution to plan for a variety of learning experiences suitable for helping their members and volunteers grow in conviction, compe-

tence, and satisfaction. The following chapter explores the ingredients of such a learning program.

NOTES

[1]Alexis de Tocqueville, *Democracy in America,* Vol. II, (New York: Schocken Books, 1961), pp. 128–29.

[2]Leo Perlis, "The Volunteer" in *Voluntary Action News,* Vol. 5, No. 5, September/October 1974, p. 5.

[3]RSVP—Rutgers Student Volunteer Program Brochure, *See It As It Is* (Newark, New Jersey, 1967).

[4]Eduard C. Lindeman, *The Volunteer,* quoted in Merrifield, *Leadership in Voluntary Enterprise,* Council of National Organizations for Adult Education (New York: Oceana, 1961), p. 77.

[5]Eugene Shenefield, "Citizen and Volunteer Participation," in Russell H. Kurtz, ed., *Social Work Yearbook 1960* (New York: National Association of Social Workers, 1960), p. 157.

[6]David Horton Smith, *Research and Communication Needs in Voluntary Action* (Washington: Center for a Voluntary Society, Occasional Paper No. 2, 1972)—excerpted and summarized by permission.

[7]Department of Public Welfare, Washington, D. C., 1963.

[8]St. Luke's Methodist Hospital, Cedar Rapids, Iowa, 1975.

[9]Nathan E. Cohen, ed., *The Citizen Volunteer* (New York: Harper and Brothers, 1960), pp. 17–18.

[10]Office of Economic Opportunity Brochure, "Voluntary Help Wanted for War on Poverty Projects," Spring 1967 issue.

[11]Wilbur J. Cohen, "The Ten Top Community Problems that Volunteers Can Do Something About in 1966," *Red Cross Journal,* January 1966.

[12]*The Cedar Rapids Gazette,* Sunday, January 26, 1975.

[13]*Saturday Review,* February 8, 1975.

[14]"Men are Donating Time to Helping Others," *Des Moines Register,* February 13, 1974.

[15]"I'm Blind—Let Me Help You," pamphlet 8–74–5M (American Foundation for the Blind, Inc.).

[16]*Des Moines Sunday Register,* August 25, 1974.

[17]*New York Teacher,* January 19, 1975.

[18]National Organization of Women, "Voluntarism—What It's All About," discussed at National Conference, Los Angeles, September 1971.

[19]*Des Moines Register,* August 25, 1974.

[20]National School Public Relations Association, *School Volunteers*, 1973.

[21]Mrs. J. G. Ellis, Jr., "The Liberated Volunteer—Is She Wastiug Her Time?" *Voluntary Action News*, September 1973.

[22]*Cedar Rapids Gazette*, February 19, 1975.

CHAPTER

2

Continuing education for all volunteers

> If . . . the meaning of life is to be discovered in becoming, education can serve as revealor only insofar as the learning process is continuous. . . . —EDUARD C. LINDEMAN*

In developing an individualized training program it should be borne in mind that not all individuals and groups need training at the same time, nor for the same reasons. Training and learning can be one of the means of attaining goals and support for a cause, a movement, or for an organization's purpose. Therefore, the plan should be related to desired objectives as well as to the needs of the individual volunteer. Content should be specific and practical in its application—*teaching how to do,* not *teaching about* volunteer activities.

One of the first steps in developing an individualized learning program for volunteers is to determine when and how such a plan shonld begin and when and how it might be terminated. The concept of continuing education does not lend itself to the interpretation of termination as an ending of the educational process, however. Rather, it indicates that the individual participating in it is now ready for further exploration and enrichment on his or her own.

In order to achieve this goal of individual maturation in the edncational process, the plan should provide the volunteer with orderly progression in knowledge, skills, understanding, and expe-

* *The Meaning of Adult Education* (New York: New Republic, Inc., 1926), p. 204.

rience; it should include the basic ingredients of what, why, how, by whom, and how long. The program should focus on a carefully determined series of learning stages, starting with recruitment-induction through orientation, group sessions stressing information and skills needed, and supervisory help on the job. Such a plan might include individual and group learning experiences by means of "training while working" assignments, informal conferences with a supervisor or advisor, formal courses, seminars, round-table discussions, and guided observation and field trips. It might also include apprentice training, assigned readings, and independent or home study via correspondence, tape recordings, and video cassettes.

Developing an Individualized Training Plan

In a small agency, the plan can be developed in an entirely functional way, basing its objectives on each individual's goals and expectations as well as on the goals and expectations of the agency. The plan then might be simple but comprehensive in scope, allowing the volunteer to enter at the stage where direct help is needed. Additional stages could be adapted according to need, whether expressed by the volunteer or observed by agency personnel. A larger or more complex institution might require a longer detailed plan involving both individuals and groups with similar experience or doing like jobs, depending upon stages of readiness and development. An informal neighborhood block project, on the other hand, can pull from the plan whatever aspects seem pertinent to its respective tasks. The main thing is, of course, that there be a *plan* and that it be carefully thought through in advance.

There are various ways the plan might be developed, depending upon the appropriateness of the situation and the particular needs of the individual. A recruitment interview and orientation to the agency, the movement, or program may be suitable in one instance and not in another. For example, an experienced or "returning" volunteer may require only an updating conference and some written guidelines on new procedures or revised duties.

Circumstances may require certain types of "crash" programs of recruitment-training where large groups are concerned. Very often this is in the nature of an emergency operation, however, and should be undertaken only when absolutely necessary. Exceptions are, of course, in times of disaster or emergency relief activity, civil or national crisis, or whenever there is an added dimension of emotional involvement to be counted upon. Otherwise, a more

carefully designed program for individuals or for small groups is to be desired.

It must be remembered that the long-range goals and philosophical purpose of an agency or movement frequently seem remote and unrealistic to most new volunteers. The level of interest is usually geared to the immediate task or current activity. Tangible goals that are to be realized within a six-month or one-year period are more vital and stimulating than are objectives to be achieved two or five years hence. Despite the worthiness of many long-range targets, some form of satisfactory experience should be provided as early as possible in the volunteer's career. If this is done, the individual may see that future involvement and realistic participation can become an integral part of service. If, however, the new volunteer is seen as a person filling a convenient job slot rather than as an individual with unique and distinctive abilities and needs, then the volunteer personnel in that agency may become static and dependent. The volunteer's aspirations and the goals of the institution or cause must be brought together and cemented *immediately*. The all-too-frequent practice of registering a new volunteer for the *next* scheduled training course as a prerequisite for placement is to be avoided, as is the equally frequent practice of "sink-or-swim" crisis placement before proper help and direction has been given.

Four Phases of the Plan

What do the various terms employed in describing the steps in an individualized training plan mean? Orientation, job training, on-the-job help, and supervision are words or titles used by a number of agencies and may have varying definitions. The terminology in general use, however, may be described as follows:

"Need to Know" Phase

While few agencies or groups recognize this phase of "Need to Know" as an aspect of volunteer training, it is actually the first step in any individualized plan. This is the phase where the individual concerned is anticipating information and direction on what he or she is going to do and where he or she is going to get help to do it. The learning motivation is high and most people are willing to give more time to training than perhaps at any other period of service. This phase bridges the gap between recruitment and assignment of responsibility. Both induction (to the job or specific task) and orientation (to the agency, movement, or project) are

encompassed in the training given at this time. Therefore, the plan must be tailored with care so that it relates to the specific needs of the individnal, assessing talents and skills as well as planning for future educational development.

Recruitment and training plans that are allied to the growth of the individual can provide meaningful experiences whether in a large complex institution such as a large city welfare department or in a small agency founded to serve a neighborhood. Even a short-term community self-improvement project should endeavor to recognize *differing* needs and abilities among the diverse people that rally to a cause. An atmosphere that conveys the message that the individual and his expectations are important, and that the agency or group *cares about* and provides for, the maximum use of human talents, will be the one that retains its volunteers. A sense of involvement and an immediate commitment can begin with a climate and with a first assignment that spells real responsibility and work of consequence. A word of warning, however: use of contrived or manipulated situations can be easily recognized and defeat this early phase of the training plan. For example, asking a volunteer to make a survey of neighborhood day-care centers as part of orientation might be worthwhile if the files did not contain an identical study made a month or two earlier. "Busy" work is not the answer and care should be exercised to avoid engaging the volunteer in trivial or duplicate tasks.

In Chapter 4, the authors have developed a variety of guides and training aides to be used in the "Need to Know" phase. These guides offer the volunteer opportunities to learn about the agency and the agency or group *to learn about* the volunteer.

Induction

Induction is usually the first formal phase of a training plan whereby a new volunteer worker becomes acquainted with the social and physical environment of the agency or the neighborhood and is introduced to the job itself. This may be done by an officer or chairman of a committee when a new committee member is appointed, or by a staff member of a unit or a neighborhood when a program service volunteer appears for work. The supervisor, a director of volunteers, or a person responsible for training in a large institution normally would carry this assignment.

Induction may be planned on an individual basis or on a group basis, if all concerned are working on the same project at the same time. Information should be provided about the work place, sup-

plies, services available, resource help, time schedules, and the like. New volunteers might be introduced to regular staff and to other volunteers working in the same or related capacities. The period for this need not be a lengthy one, but enough time should be allowed for a relaxed, informal approach, and for questions and follow-up discussion.

Orientation

Orientation is the process of acquainting a new or "returning" volunteer with the agency or institution, or with the neighborhood or community project, from the point of view of overall purpose, policies, practices, and procedures. In the case of new board members or trustees, a president usually conducts orientation with resource help from other officers and staff members. If a program service volunteer is involved, a staff director of volunteer services, a supervisor, or the person responsible for training and development might carry this assignment.

Orientation may be planned on an individual basis, for a group of new volunteers, or for a group of "returning" volunteers in order to update them on changes in policies, procedures, schedules, and the like. For the new volunteer, orientation should provide information and help on coordination and structure in the agency or movement, and on the *relationship of the individual's specific job* to the purpose and work of the agency. The time period for orientation may vary according to the individual's need and the size and complexity of the institution. A day, several days, a week or more may be required. Ample allowance should be made for question and discussion periods, and for informal meetings and conferences with various individuals and units in the organization at their respective work situations, such as offices, bureaus, out-based centers, and field stations.

Induction and Orientation Combined

While combining the induction process and orientation is not recommended as a regular practice, there may be times and special situations where it may be necessary or more realistic to do so. Small neighborhood block projects, for example, or tenant associations, consumer education groups, or isolated community workers, may combine induction to the job and orientation to the movement or overall purpose by planning content and method with care.

In Chapter 5, the use of a volunteer job description as part of a training-learning plan will be explained. The use of a form to

write a job description, together with reading material and informal opportunities to observe, may be all that are needed in some types of volunteer activities.

Job Training

Job training is designed to help new volunteers to understand and enjoy their jobs, learn some of the knowledge, skills, and techniques needed to do those jobs, and to have an interesting and challenging experience in the early stages of service.

General areas to be included in this training should relate to the *information* needed about the job and the agency as well as *practice* in how to do the job, and *where* to get direct or resource help quickly and easily.

The length of time allocated to job training will differ according to the tasks or degree of responsibility. In some cases, a few hours or several days may be required, and in others, a week or several months.

Opportunities for Development

Further training follows and *builds upon* previous courses or training assignments and upon the volunteer's job experience and special interests. The purpose of offering development opportunities is to help the volunteer increase and deepen knowledge and understanding of the job and of the agency's purpose and program. Such training should emphasize the progress of the volunteer by measuring as far as possible the respective individual's:

- ability to make decisions and carry them out with a minimum of assistance;
- growth in knowledge, skills, and understanding on the job;
- ability to give leadership and to initiate new ideas and activities within the scope of the job or the responsibility assigned;
- development of positive attitudes toward individuals and groups in the organization and in the community served;
- development of behavior patterns that show evidence of acceptance and flexibility in working with individuals and groups.

Supervisory Support and On-the-Job Help

The title of this category is self-explanatory and the training usually is given in the form of guidance and advice. The training may take the form of instruction in the use of a machine, in following procedures or outlines, or in "walking" through the

duties of a job. On-the-job help for a committee chairman or board member involves informal consultation with specific individuals responsible for a task or activity related to the board or committee's work. Group or staff meetings also may be a form of on-the-job guidance provided preparation and review are included. Special conferences with a unit head or supervisor on work assigned or on field observation often offer help at a crucial point for both new or experienced volunteers.

The emphasis here is on the effective communication between the latter individuals and the persons responsible for the task to be accomplished. The time involved may vary from a short telephone conversation to a period of several hours. A regularly scheduled series of conferences, especially at the beginning, will reveal weaknesses and strengths at a critical period in the volunteer's training and development.

Decision-Making Volunteers:
Officers, Board, and Committee Members

The individuals carrying responsibility for policymaking and goal-setting in an organization, namely, the officers and members of a board of directors, are often overlooked when it comes to the matter of training. Many of these people usually are long experienced in business and the professions and have attained considerable prestige in the community. "Training" is, therefore, considered superfluous. But like many top administrators and professional directors of institutions, board members rarely know or have contact with the people who are to be served by the agency or who are its rank and file members. Often top administrative personnel refer to the latter as "our clients," "problems," "groups," or "this or that community," and have little or no knowledge of the actual individuals concerned in the problem or making up the group. Most board members, officers, and committee chairmen need greater understanding and deeper awareness of the people involved in the program and in the community itself.

Furthering the purpose and program of the agency or institution is the main objective of a board member's job and at least some form of briefing should be offered for this important job responsibility. There are three problems related to determining the form of such a briefing, however, and these are

Time—limited on the part of many trustees or board members.

Content—difficult to select and tailor to the needs of well-educated, widely traveled individuals.

Method—how to relate informational and attitudinal content to the individual officer or board member in an interesting and varied manner *within the time limitations.*

SAMPLE OUTLINE

Purpose

The purpose of a briefing session for an officer or board member should focus on providing a background of knowledge and attitude that will help the individual to make wise decisions and to formulate intelligent policies that will further the overall purpose of the institution or agency.

Content and Methods

The suggestions contained here can be adapted or modified in accordance with the needs of the individual and the institution.

Reading Assignment	Selected readings to include annual reports, special studies, bulletins containing highlights of the institution's program and activities.
Field Visit or Tour	To observe the program in action; to meet a teaching or hospital staff; to speak with counselors and children in camps; to observe a rehabilitation clinic with patients and doctors on hand; to make a tour of a corrections facility or a sheltered workshop.
Film Showing or Demonstration	Viewing an inspirational film, a demonstration of new scientific techniques, a display of children's art or handicrafts.
Follow-Up Discussion	Informal meetings and discussions with key volunteers and professional staff on questions raised or interest aroused on the part of the new trustee as a result of the above methods on "what the agency is and what it does."

For further educational development selected reading and/or discussion in the following subject areas should prove useful:

- Relationships of the agency's services and the resources within the community.
- Interpretation of the agency's objectives to the community.
- Strengthening interagency relationships and coordinating community services and development.

Independent Study for Officers, Board, and Committee Members

In order to cope with the problems of time and selection of content for the continuing education of many decision-making volunteers, various opportunities and materials are available to help these individuals find out what they want and need to know for their jobs and to learn it on their own time. This informal method of self-help can provide the answer to the dilemma of board and committee training. Often the opportunities and materials for independent study exist both within and outside the institution. Perhaps there is no job description available for an officer or board member and it may be unrealistic and untimely to suggest the use of the sample outline described in this chapter. A more useful method, in this instance, might be to analyze the bylaws and board minutes, or to observe a board meeting in action, or both. In that way, such questions as: What do the bylaws and constitution say about the office I hold? To whom am I responsible? What regular work must I be sure to complete and by what date?—can be answered in a practical and productive manner, providing broader understanding of the job and the work of the institution.

Other ways of providing independent or self-help training are as follows:

- attending and participating, as appropriate, in meetings of committees or groups in various parts of the institution, studying the agendas and attachments carefully in advance;
- reviewing all available materials of, and about, the institution in detail, such as: bylaws, brochures, flyers, reports, news clippings, minutes of board and committee meetings, and of any special meetings or membership meetings. This review of written materials should not be done in a superficial manner. Rather, the reader should undertake serious and purposeful study, looking for clues and inferences, and learning in depth about the working procedures of the institution;
- getting acquainted with other board and committee members and taking interest in their activities;
- starting an informal "idea-exchange" with decision-making volunteers in other agencies;

- looking for special services and program aids, such as: mailings, a correspondence course, consultation service, mobile units, loan libraries, circulating packets of materials, displays or exhibits. (Sometimes these are made available through local affiliates or state chapters of national organizations.)

There are many resources for *independent study* outside an institution, such as:

Libraries—Municipal or county libraries not only offer resources in materials, such as books, films, records, tapes, but often offer special programs on various aspects of community participation helpful to anyone working with individuals and groups.

Adult and Continuing Education—Many courses are offered on aspects of community and organizational activity in the adult education programs of the public schools and in the continuing education and community service programs of colleges and universities. The formal and informal courses range from parliamentary procedure and public speaking to discussion leadership and group dynamics. Recent additions to this rich roster of adult development are the continuing education programs for women and retired professionals which focus on significant community service as well as on career guidance and opportunities for vocational or higher education.

Mass Media—Selective attention to the various forms of mass media, such as television, radio, newspaper, and periodicals, can offer much in the way of self-help. For example, the simple activity of keeping a scrapbook of news clippings on topics pertaining to the institution's program in meeting a community need could well increase an individual's understanding and evaluative ability, if done in a conscientious manner over a period of several months.

In any one of these learning experiences, a volunteer might develop his or her leadership potential, provided the individual continues to relate new or reinforced knowledge and understanding to concrete activities. The volunteer who is concerned with both knowing and doing needs to keep this goal in mind: to learn how to be of increasing service to the agency and to the community by acquiring greater knowledge and skill in areas of special interest and concern.

Thus learning in itself becomes a continuous process for the individual who grows and develops through each succeeding educational experience.

Keeping the Plan Flexible

Job and developmental training need to be defined in terms of the job to be done, the individual's responsibility and the respective agency's purpose and goals. The important aspect to remember is that the plan be kept as *flexible* as possible. Whether there is a need for formal or informal training, or general or specialized courses, the plan should never become so rigid that every individual and every group is required to undertake the same sessions or courses, or for the same length of time. Variations can always be made in any plan and adaptations according to need can be designed from time to time. An elastic time schedule can be developed, too; one that will meet the requirements of business and professional men and women, young mothers in a suburb, parents in a housing project, or block workers in a poverty area. Some will have too little time available, others will have too much. Some will require help in organizing their activities, and others will need direction in how to use time constructively.

EXAMPLE: A TWO-WAY ENCOUNTER THROUGH TRAINING[1]

Today there are a number of cooperative efforts between the so-called traditional or middle-class volunteers and volunteers in disadvantaged areas served by a long-established agency or social service. Talents and skills can be found in all localities, including inner-city slums and deprived rural sections of the country.

For example, recruiting and training parent leaders from migrant labor camps together with "traditional volunteers" posed a challenge for a well-known national youth organization. Included in the recruitment-training were parents from nearby communities as well as the temporary settlers, new to volunteering and to community service.

There were four phases in this educational plan and at times one phase seemed to overlap another as the plan progressed: (1) exploration of the community; (2) recruitment of parents from nearby sections as well as adult migrant workers; (3) training of those recruited; and (4) on-the-job help. In the first phase, the contacts were diverse indeed and ranged from project managers, teachers, social workers, nurses, church and service club members, to the farm labor people and the various nonfarm personnel involved in the migrant areas.

The recruitment, or second phase, revealed that school and health volunteers required only a brief explanation of, and orientation to, the program. It was evident that more time would be needed for the migrant volunteers in all phases. Unfamiliar with the language and procedures of a community service program, the mothers in the migrant camp needed to understand more fully what they were expected to do. It was important to keep the recruitment phase both informal and friendly. Recruiters talked about what the farm workers were interested in, about the objects observed in the room or boarding house, and about the members of the family. Then a brief explanation of why volunteers were needed and how anyone interested in children and their welfare could help in some way.

The actual training, or third phase, was geared to volunteers unaccustomed to participating in a group experience except as part of a family or work unit, unskilled in notetaking and using books, and with little time to spend away from work or child-rearing chores. A trainer talking with a group in a boarding house or hostel might put up some pictures or play a recording and then discuss the content informally, asking questions and demonstrating skills related to the worker's own experience or abilities wherever possible.

The fourth phase, on-the-job help, became important from the point of view of selecting the actual leaders from among those trained and then giving them help and guidance from the start. Flexibility in scheduling and many opportunities for "give and take" between the farm workers and the "traditional" type volunteers were included. The amount of ingenuity and adaptation in achieving informal encounters and the two-way conferences among the teachers, nurses, farm personnel, and the migrant volunteers revealed the real learning taking place. The need for sensitivity and informal communication on the part of the trainers to keep the two groups involved was constant. Both gronps were needed for the program and would benefit from the contacts with one another, and as a result of the training, there would be a nucleus of able leadership ready to take responsibility whether or not the migrant camp stayed or moved on. And in the migrant group there would be a cadre of trained leaders ready to start at another encampment provided encouragement and support were available.

Some of the techniques described here could be applied to a leadership training venture in a day care center, a cooperative food-buying project, or a neighborhood block association. In such

groups, parents and neighbors might develop their own "need to know" content. The training could include informal home visits, a one-shot demonstration meeting involving the parents and neighbors directly, and then giving support as needed. Just going beyond the family circle or the neighborhood block to meet a group of strangers becomes a major undertaking for some individuals. Group leaders or trainers working with disadvantaged or low-income participants should always endeavor to express sympathetic understanding and to listen and observe at every stage of the training-learning process.

In general, it may be said that there are four coordinated phases or stages involved in developing an individualized training plan for both administrative or decision-making volunteers and program or service volunteers. These steps take the individual or group from a "need to know" phase through job training, on-the-job help and supervisory support, to developmental opportunities.

KEY QUESTIONS ON INDIVIDUALIZED TRAINING

When developing a plan for the continuing education of all volunteers, the questions given under the subheadings below may be useful to recap necessary points for inclusion. The questions are broadly based and general in nature but focus mainly on the *individual* volunteer. In considering these questions, bear in mind the purpose and program of the particular group or organization to be served. If the questions reveal serious gaps or inadequacies, a major review may be needed. A few gaps might indicate that some rethinking or revision is in order. If all the questions can be answered in a positive manner, then the plan should be ready for implementation.

This outline can be used by a director of volunteers or an individual assigned the task of drawing up a training plan. Or it might provide a group evaluating training with a selected list of questions to be used as points of departure for a provocative discussion. The same questions might then be matched with a discussion group composed of volunteers who participated in the training itself.

Recruitment or "Need to Know" Phase

1. Has the recruitment interview been planned to communicate a positive attitude about the agency or service program to the new volunteer?

A. *RECRUITMENT AND "NEED TO KNOW" PHASE*

This occurs at the time of the initial contact with the agency or group, via newspapers, social event, meeting, through a friend or relative, or by direct inquiry of the volunteer.

Decision-making or Administrative Volunteer

An informal face-to-face conference to give information and to discuss with the prospective volunteer what will be expected of an officer or board member in the organization. Accurate and up-to-date materials should be available and a follow-up appointment made at the convenience of the recruit. A social visit with a committee member or staff might be in order if time permits.

Program or Service Volunteer

An informal face-to-face conference to give information and to discuss with the prospective volunteer what operational jobs are available and what the qualifications are. Woven into the discussion should be a brief introduction to the underlying purpose and program of the organization or agency. A follow-up appointment should be made at the convenience of the recruit and accurate and up-to-date materials given for reading. An invitation to visit some aspect of the agency's activities might be offered if the recruit is interested in obtaining direct information.

B. *INDUCTION PHASE*

Follow-up of the "Need to Know" phase should include facts about the job and an introduction to the ageucy or institution.

Decision-making or Administrative Volunteer

Induction to the job of being a board or committee member is given by a chairman or officer and includes a discussion of the expectations of the agency, an informal review of the job description with discussion of duties and responsibilities, and an interpretation of general procedures, history, and relationships. A briefing kit of material should be provided with reference books, reports, bulletins, and publications included.

Program or Service Volunteer

Induction to the job of being a program service volunteer in a specific work assignment. Informal review of the job description with time for questions and discussiou. Introduction to the work area and to coworkers. Interpretation of general procedures and items of interest about the history and development of the agency. A fact sheet on current activities and the community to be served should be distributed to all new volunteers.

This phase may be combined with (C) Orientation Phase that follows or Induction and Orientation (B and C) may be scheduled separately.

C. *ORIENTATION PHASE*

Decision-making or Administrative Volunteer

Introduction to officers and policy-making volunteers; a social event to meet administrative staff members and to make appointments for conferences on specific areas of responsibility; field trip to visit and observe activities in the community; attendance at related staff and committee meetings; general convocation at opening or closing of orientation session(s) with a prestige person giving an inspirational talk followed by general discussion. Emphasis should be on the overall objectives and goals of the agency, its history, and phases of development.

Program or Service Volunteer

A meeting with the chief officer and executive of the agency, either an information and greeting type of event or an informal social gathering. A field trip to the various parts of the community served by the particular agency or group. Observation of a pertinent activity with opportunity for questions and discussion immediately afterwards with volunteers and staff involved. Opportunity to visit and observe other service activities of the agency. If possible, a joint meeting with administrative volunteers for an inspirational talk or film showing activities of the agency. Emphasis should be on the overall purpose and objectives of the agency, and the *relationship* of the direct service job(s) to purpose and program.

D. *JOB TRAINING PHASE*

The emphasis here is on relating the training specifically to the individual volunteer's needs and abilities, focusing the content on the job itself. Technical advice or skill sessions in a planned sequence should be arranged for group or individual participation. In some instances, preparation for real responsibility by an on-the-job experience should be included. Opportunity for the new or "returning" volunteer to learn more about the agency in a practical way and to test knowledge and skills in a reality situation should be provided, if possible.

Decision-making or Administrative Volunteer

An organized reading program with related observation or field trips followed by briefings. Review of constitution and bylaws, policies and procedures, historical development, and community relationships.

Assignment related to job responsibility such as chairing a meeting with full responsibility for building agenda; conducting discussion; preparing and evaluating a report; carrying out part of a plan or assuming responsibility for an event; writing a report with recommendations; evaluating an event with appropriate individuals.

If needed, training in parliamentary procedure, public speaking, planning, and analysis should be included.

Program or Service Volunteer

As far as possible, a flexible training plan should endeavor to find out what the volunteer needs to get started. It may be a skills course in home nursing or camp-craft, a refresher in leading group discussion or learning how to operate audio-visual equipment. The volunteer should be helped to be responsible for his or her own learning and to seek the resources and advice needed without wasting time on things already known or not applicable. An organized reading plan directly related to the job and field trips with briefings on how others are doing the same job should prove helpful but only if kept to the shortest and simplest format. The new volunteer wants to get started and part of the job training given can be a direct assignment to the job itself. The new volunteer can start to work with hospital patients or with the public; be responsible

for a service desk; teach a class; conduct a story-telling hour for handicapped children. The important aspect of this form of training is that there is a target date for evaluation and discussion of future learning experiences and intelligent, sensitive supervision along the way.

E. *SUPERVISORY SUPPORT AND ON-THE-JOB HELP PHASE*

Supervisory support and on-the-job help are related closely to earlier training and should evolve gradually from it to actual help or guidance while doing the job. It is *not* a course nor formalized training.

Before an individual takes on an assignment, some opportunity for the new volunteer to review previous experience and training should be provided. This will supply "feedback" information to the trainers or supervisors.

An evaluation of the feedback may indicate whether or not further help will be needed and for how long. Special skill in knowing "when to hold back" and "when to step in" will be needed by supervisors giving on-the-job guidance. Resources applicable to the job and useful to the volunteer should be readily available.

Decision-making or Administrative Volunteer

An informal conference on whether or not the volunteer feels prepared to undertake responsibility for decision-making on a board or committee, for chairing a meeting or session at an annual event, or to make a speech on the organization at a local luncheon, will provide sufficient information on what further training or help will be required.

Program or Service Volunteer

A face-to-face conference immediately after orientation or job training should elicit information on whether or not the volunteer feels ready to be responsible for a hospital service desk, or to conduct an arts and crafts class for handicapped children.

On-the-job help might take the form of teaming an

Guidance might take the form of reading assignments or research on reports and surveys relative to the topics under discussion, a conference with staff to review past practices and policies, a field visit with advanced preparation, or an informal practice session with small groups on the purpose and program of the agency or institution.

experienced worker with the new recruit or allowing the volunteer extended time to observe and practice on his own. A form of apprentice training might be required for certain specialized assignments and in this case a staff member might work directly with the volunteer until he is ready to carry on alone. Generally all that is required is that the staff supervisor or a team captain, an officer, or a membership chairman responsible for the service be available just *before* and immediately *after* the work assignment in order to answer questions and review problems.

F. *DEVELOPMENTAL OPPORTUNITIES*

Providing development opportunities offers the volunteer wider choices and new options of interest and exploration. These choices and opportunities may be made available *within* and *outside* the institution.

Decision-making or Administrative Volunteer

The emphasis in providing opportunities for development is on increased knowledge and deeper understanding of social and community organization and development; on skills in human relations; on problem-solving techniques. Administrative workshops or institutes on administrative management; board and committee leadership; practice in parliamentary procedure; and skill training in conducting

Program or Service Volunteer

The emphasis in providing opportunities for development focuses on increased knowledge and deeper understanding of the agency's purpose and program; on improving skills and techniques related to the job; on learning new or specialized skills for a change of job or increased responsibility.

Types of experiences that might be offered are

meetings and group discussions are some of the workshops and institutes that might be offered.

Examples *within* the agency are: increased responsibility on the job, new or varied experience, rotation, or transfer as appropriate.

Outside opportunities may be found in various university extension courses, adult education seminars, residential conferences, and attendance and participation in national and international meetings.

skills courses in medical record-keeping, planning meals for the elderly, family camping, learning to read Braille.

Examples *within* the agency are: job courses, field trips, skills workshops, conferences based on planned, progressive experiences.

Outside opportunities may be found in adult or continuing education courses in schools, community centers, and colleges; interagency workshops on specific topics; attendance and participation in local and regional events.

2. What future learning about purpose and program can be offered in a face-to-face conference immediately after the recruitment interview?

3. Will the information offered in the initial stages relate to previous knowledge or experience? Does it have practical application from the point-of-view of both the new and the experienced volunteer?

4. What part of the training will reveal how much the volunteer *knows about* the agency and about what he or she is being asked to do?

5. Is the recruit being helped to see his or her future role as one of challenge and growth? Has the training included this aspect in the recruitment or orientation phases?

Learning Through Participation

1. What is known of the volunteer's expectations regarding service and meaningful work?

2. What choices regarding jobs, specific assignments, and amount of responsibility will be offered?

3. What meaningful assignment will be given to the volunteer that will indicate to him or to her that the job really matters?

4. Is a job description available and is it a realistic one? Will it be reviewed with the newly recruited volunteer?

5. What type of opportunity has been provided that will test the volunteer and at the same time provide a *learning* experience?

Learning and Development

1. Are the steps or phases of the training designed to offer a growth and challenge as the volunteer continues in the agency or service program?

2. Will the experienced or "returning" volunteer find new information and a choice of worthwhile assignments to up-date and challenge his or her talents and skills?

3. Is the content and method of the training focused on the *differing* needs and abilities of the many and varied individuals involved?

4. Will the training create a climate of flexibility and freedom that can be communicated to all volunteers involved?

5. Have the developmental opportunities included the four elements of *participation, development, achievement,* and *recognition*?

A survey of training being given in different settings and for diverse groups indicates how the steps in the individualized training plan might be modified or adapted according to purpose and need. In one instance, an extensive in-depth type of orientation may be required for volunteers working in a prisoner legal assistance program and emphasis would have to be placed on the bureaucracy of court procedures and relationships between court-appointed attorneys and clients. This cannot be accomplished in a few hours, but may need several days to a week with field trips and interview sessions. On the other hand, all that may be needed for a group of neighborhood block watchers cooperating with a police auxiliary unit is a two to three hour recruitment-induction session given by local police precinct personnel.

Sometimes combining two groups of volunteers in one or two sessions might prove useful in orienting them in how to work together productively. Assigning staff and volunteers to specialized skill training institutes can result in reinforced learning for both groups. There may be many ways to combine, integrate, and adapt the four training phases previously described; the order to be followed is not necessarily an important factor.

NOTES

[1] Adapted from "A Report on Two Girl Scout Pilot Projects: Migrant Agricultural Workers and Urban Hard-to-Reach Group," Luada Boswell, *New Perspectives in Services to Groups: Theory, Organization, Practice* (New York: National Association of Social Workers, 1961).

CHAPTER

3

Development of volunteer training programs

> Action without study is fatal. Study without action is futile.*

The educational process of bringing about changes in human behavior to achieve a desired result is the purpose of all teaching. Therefore, building content for the training and development of individuals must be focused on effecting changes in the knowledge, attitudes, and skills of the individuals. The end result should be more effective programs on the part of the agency or organization, and self-learning and development for the individual.

Knowing and Doing in All Training

The basic content grows out of the needs and interests of the individuals or groups that make up an organization as well as the objectives of the organization. The factors of

Knowing	*Doing*
What does the volunteer have to *know*?	What does the volunteer have to *do*?

are of equal importance in the building of content. Facts, skills, and attitudes should be included and utilized to the fullest extent in the training to be given.

If knowing and doing are of equal importance in all volunteer

* League of Women Voters of the United States, *The National Voter*, supplement to the October 1967 issue.

training and development programs, an important practical conclusion becomes evident: *program service volunteers* are more concerned with DOING, and it is of great importance to include *more than* skills in their educational programs; *decision-making volunteers* are more concerned with planning, policy making, and evaluating, and it is of great importance to include *more than information* in their educational programs.

The motor-pool driver who escorts an elderly client from home to the County Department of Social Services to pick up food stamps should be sufficiently informed on the department's procedures to converse with the passenger en route rather than being only a chauffeur. Activities within the board member training program in Chapter 2 included field visits, discussions with clients, observations of programs, and home study, in addition to presentations.

A Three-Stage Planning Process

In planning content, the needs of the individuals and the objectives of the organization are paramount in importance and the task of integrating both aspects falls upon the individual or group responsible for the organization's volunteer training program.

STAGE 1: GATHERING FACTS

The *first stage* in the planning process is *gathering facts.* There are three basic ways to do this: to ask, to observe, to study. Simple as it is to state, this trio of action verbs is often overlooked in the busy process of disseminating information or skill practice as quickly as possible. If we ask, observe, and study, our content for training and development will more likely establish a learning-centered goal for both individuals and organization or agency.

WE CAN ASK

- incumbent volunteers such as chairpersons of committees or advisors of groups, fund raisers, receptionists: What would you like to know about your job? What would you like to have learned when you first started out as a volunteer and what would you want new volunteers to know so that they can be as helpful as possible right from the start? Who helped you get started and how? How do you feel about the service you are giving and about the organization?
- new volunteers: What questions do you have about the organi-

zation and about your assignment? What are your expectations? What help do you think you need?

- employed staff: What have been your happy experiences with volunteers? Why? What was disappointing and what could be done about it?

WE CAN OBSERVE

- board and committee meetings, volunteer-staff relationships, the social pattern of the office, the work space whatever it may be. Are volunteers prompt so that activities and meetings can begin on time and accomplish their purpose? Is there good participation with free expression of differences of opinion? Are volunteers interested and enthusiastic about their work? Is everyone busy and involved? How do volunteers talk about the employed staff and vice versa? Are materials available? Are volunteers made welcome when they arrive and thanked when they leave?

WE CAN STUDY

- the program activities and administration of the organization or agency in relation to its stated goals and objectives. There are annual reports, board and committee minutes and reports, job descriptions of volunteers and staff, and maybe a special study or research project. There are news releases and radio and television announcements or scripts, notes of speeches made to other groups, announcements of special events, brochures, schedules and the like. Finally, there are the attitudes and opinions of the public at large about the organization: what do other people think have been the significant contributions made by the agency upon the various segments of the community?

These three methods, while all contributing to the successful development of a well-rounded and balanced body of content, need not be followed in any specific order, but may overlap or may be used in combination.

In addition to providing a great deal of material on which to build content for group and individual learning experiences, these three aspects of planning have the added advantage of reassuring volunteers that the training content is not developed from books or as a repeat of last year's training program, but that an attempt is made to draw on many parts of the organization for their ideas in order to update the training.

If time and personnel are available, further information may be obtained through questionnaires, open-ended interviews, and informal group discussions. Interviews or group discussions could take place at regular meetings (before the formal opening, after adjournment, or as part of the agenda); simple questionnaires could also be distributed at such times.

Another approach would be to contact a random sample of members or volunteers by questionnaire, telephone, or face-to-face interview. Questions must be simple, direct, and concise in order to avoid generalities. Asking a volunteer who has participated in an educational program to assess its helpfulness after a period of time on the job is often more valuable than an evaluation at the end of the program itself. Detailed suggestions for evaluation of teaching and learning as the basis for planning—including how to make a survey of a total volunteer program—are discussed in Chapter 8.

STAGE 2: ANALYZING THE INFORMATION COLLECTED

Developing appropriate content for the various types of training courses and self-development materials requires careful analysis of the information collected. If, for example, there is lack of communication between the board of an organization and the rest of the volunteer group, this may be due to a number of causes. Communication is a persistent problem in all organizations, whether industry, business, government, or voluntary association. Distortions may occur in the way the program service volunteer looks at the board member and vice versa. Such distortion may be historical in nature: the board may have been far removed in social standing and wealth when the institution was founded, but now has changed its composition. The feeling of social distance, however, continues. The service or program volunteers may feel that "they" (the board members) do not understand the job to be done and any concern expressed by "them" is more or less superficial. Physical distance distorts to some degree, we know, and if the amount and kind of communication is inadequate, distortion is increased.

What remedy does training have for this distortion? What content can be developed that will recognize the basic cause and focus on the need for an effective chain of relationships within the organization? This may require much more skill in written and verbal communication; it may require a thorough explanation of procedures and structure, of informal as well as formal relation-

ships in the agency. The person or group responsible for building the content of such training will need to look in depth at the cause and effect of the organization's communication systems and plan accordingly. A superficial approach using "gimmicks" cannot have lasting results.

In a number of interviews with board members, a lack of understanding of their role in the organization might be revealed. These individuals may have job descriptions and an organizational chart carefully outlined for reference. But the internal realities of the organization, its history and development over the years, and its "politics" as well as its policies, may be unknown to many of them. Underlying the development of a suitable content is an orderly process of selection, development, and organization of material based on such analysis.

STAGE 3: IDENTIFYING A FRAMEWORK FOR ALL TRAINING

One way of looking at content for volunteer training may be illustrated by the picture frame on p. 49. The specific agency needs and priorities discovered in stages one and two are at the top of the frame while its base is the overall purpose of the agency or organization upon which all programs and services are built. In the case of a local chapter of a national organization, for example, the base which supports the frame would be its philosophy and general purpose. The two sides are the specific volunteer job or jobs and the needs and interests of the individuals.

The left side indicates that a group training program must consider possible individual needs, interests, and special circumstances; for example, in the case of volunteers with related experience transferring from another community or from having carried a very similar job in another agency.

Core Content for All Training

Every human service agency has a certain body of knowledge and certain principles, values, or beliefs which it wants each volunteer or member to understand, accept, and practice regardless of the type of activity in which he or she may be engaged. An organization whose objectives include the promotion of good nutrition for children and young people may or may not have a policy discouraging the use of cake and candy sales as a method of fund raising, but it just is not done. The reason for such practice needs

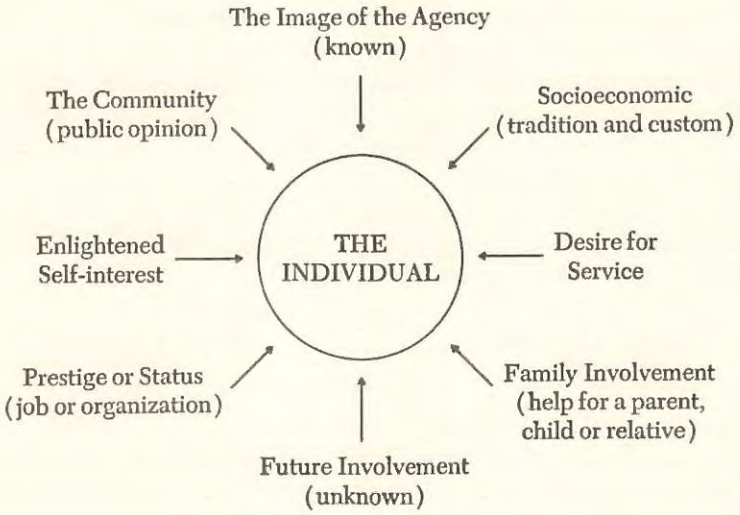


Diagram 1

to be explained to all volunteers and would provide some very concrete content for training the members of a Ways and Means Committee in regard to organizational objectives, policy making, and planning of special projects. It would also give all members of the organization concrete assistance in promoting whatever fund raising project is undertaken in relation to the group's aims and objectives. This kind of training approach would tie in the base and top sides of the framework of Diagram 1.

However, volunteers working on the fund raising project would also need help in record keeping, handling the public, merchandising, displaying—if it is, for example, a white elephant sale; in letter writing, telephoning, and interviewing, if a fund drive is undertaken. This would tie in with the right side of the framework, i.e., teaching specific skills and activities needed for the job. These should not be taught separately, but connected with information of WHY the group operates in this way, thus relating "knowing" and "doing" for the fund raiser, Ways and Means Committee member, or special project volunteer who helps out only on the day of the white elephant sale in a very important public relations capacity.

A further part of the content should give information about the number and types of volunteer positions in the organization. There

are a number of reasons for including this content: volunteers see their activity as part of the whole; board members respect what program or direct service volunteers are doing and vice versa; new volunteers learn that there are other opportunities for service in the organization; special project (short term) volunteers may become interested in another aspect of the agency's program when the special project is over.

The "core content" for any kind of educational program on any of the steps of an individualized learning program outlined in Chapter 2, therefore, includes the following:

INFORMATION (KNOWING)	APPLICATION (DOING)
1. Some general reference to the stated aims and total program of the agency; its history and current developments.	1. How to use bylaws and other literature in a concrete way for reference and interpretation.
2. Some discussion of present activities and problems of which everyone needs to be aware, including volunteers involved in the program, (individually or in groups) and the staff.	2. Practical uses of newsletter or other house organ, reports or minutes of a specific committee; budget, etc., for reference, interpretation, recruitment of other volunteers, and fund raising.
3. Resources, relationship to other parts of the organization.	3. Help in doing the specific job: materials, tools, schedules, introduction to coworkers, work space or meeting place, trends and current developments pertaining to the job or project, and the expectations of both the organization and volunteer.

It can be readily seen that these three content areas cannot be taught separately, but are interrelated in the training of both decision-making and program volunteers. Every educational program should provide increased understanding of the agency or

organization and stronger commitment to its purpose, as well as increased competence in volunteer service, thus contributing to the individual's growth as a person. Each training program or learning experience should be planned in line with these objectives and include all three content areas, even though the emphases vary: an induction conference would deal primarily with helpful materials regarding the job itself (item 3 under "Application"); an orientation session might highlight items 1 and 2 under "Information" (goals and program of the organization), but reference should be made to the other content and an explanation given as to where, when, and how it is included in the educational program for the individual within the framework described above.

The planners must be particularly aware of an organization's special goals and current emphases, and of the contribution the educational program can make to their achievement. Education, it must be remembered, is not the panacea for strengthening all phases of the organization's work, eliminating weaknesses in the activities of the volunteers, or achieving more active participation by all its members. It may be that the problems are caused by ineffective recruitment, cumbersome red tape, autocratic top leadership, overburdening of a few volunteers with too many different jobs, lack of opportunity for "earned" leadership roles—in other words, administrative conditions which cannot be improved through an educational program alone. However, once the agency's or organization's objectives and emphases have been established, the educational planners can develop a program which contributes—together with the efforts of other groups in the organization—to overcoming recognized problems.

Who Should Plan the Educational Program

Many people are involved in the planning process for training and development, some in providing information, others in securing it and putting it to use in planning. Among this latter group two functions can be distinguished:

1. Responsibility for the total volunteer training and development program—carried by the board of directors, a committee on training or education, or some other official of the organization in an administrative leadership capacity. In a group or agency with professional staff, a director of volunteers or director of education would give staff service to the volunteer leadership group and carry the overall responsibility for the operation of the program.

2. Responsibility for conducting specific educational events—

carried by an instructor, trainer, chairperson, project director, or other leader within the organization, or an outside consultant. In groups with professional staff, a director of volunteers would probably serve as trainer, consultant, resource coordinator, or supervisor of other trainers.

It is also possible that these two functions are combined in one person; for example, the president or chairperson of a small club or organization, or the coordinator of volunteers. It would be advantageous, however, to involve other members in the planning process, both in helping provide and to gather information on needs and in ntilizing the help of outside consultants in leading the actual learning experiences. Sometimes an ad hoc committee or task force is set up within an agency or on an interagency basis to help develop content and format for a training event.

Involvement of Prospective Participants

A questionnaire or a registration form serves the main purpose of providing those planning the training with information about the group of participants they may expect—experience, background, interests. It provides opportunity for the participant to make his or her expectations known and to supplement whatever information about him or her is available through records of previous contacts with the volunteer department (recruiter, interviewer, supervisor, trainer, etc.).

The simplest form is a postcard with return address, summarizing very briefly the purpose of the training and asking a few simple questions. Such a postcard, or a more elaborate questionnaire form, are equally ineffective unless the training announcement provides the trainee with a framework within which to answer. The more preparation about a job and the organization's training program the volunteer has had, the more articulate the other comments will be.

Examples of questions are:

I have the following questions about the information on this training as announced:

I have the following questions about my job as

_____:

(volunteer position)

I hope the training program will include the following:

Sometimes a checklist is helpful:

I would like to learn more about the following program methods for use in planning meetings:

____ buzz groups
____ debates
____ exhibits
____ films, filmstrips, other visual aids
____ discussion groups (large)
____ etc., etc.

(Instructions should be given as to the number of choices allowed.)

The leader of the training program has the responsibility to *use all information* for which he or she asked in making his or her detailed training plan.

Some of the answers will be useful in a general way; for example, knowing the proportion of trainees who are either chairpersons or members of committees, or are more or less experienced on the job, may be helpful in deciding on how to divide the group into discussion or work groups. Other items may be tabulated and presented to the group on the blackboard, a chart, or on individual sheets, to explain why the training event is planned in a certain way or to get additional answers to a given question if only a small number of questionnaires were returned. In a brief program such feedback should be handled very quickly to prevent the trainees from becoming impatient about "getting started." Yet this method of involving trainees in the planning can be used to demonstrate methods for planning programs for which the trainees themselves are responsible—a group of program chairmen, or trainers, or youth group leaders, for example. In that case, both generalizations and variations shonld be discussed, such as referring the answers to a planning committee for review, evaluation, and follow-up.

Planning and Organizing Learning Experiences

Planning for volunteer training and development involves these aspects:

1. *Goal Setting*

   To determine the overall purpose and emphases for the training of all volunteers and to set objectives for a specific learning experience for a specific individual or groups of individuals

2. *Content*
   To decide on the general content for one or more types of training programs and to organize the content into an outline for the particular training event only

3. *Methods and Techniques*
   To plan for the general format for various types of training programs and to select specific teaching techniques and aids (make lesson plans)

4. *Evaluation*
   To assess on a regular basis the effectiveness of all training programs as the basis for future planning and to assess the value of a particular learning experience for the participant(s) and the agency.

General Goal Setting

Most agencies and organizations expect from the volunteer training program:

- strengthening of the total program because members and volunteers are more knowledgeable;
- smooth operation of programs, projects, and meetings because volunteers are more competent and dependable;
- more capable leaders because members and volunteers are more informed and concerned about the affairs of the total organization and both willing and capable of participating more intelligently and more actively in the planning and decision-making process, including the election or appointment of leaders;
- more public support because members and volunteers are articulate and enthusiastic spokesmen for the agency in the community;
- longer tenure and high morale among all personnel because the individual is aware of his or her contribution and personal gain as a worker in the organization—whether he or she is paid or not paid for the services.

The community-at-large, especially funding bodies, also expects agencies and other community organizations to include in their goals for volunteer training:

- an attitude of broad community-mindedness instead of agency competitiveness;

- understanding and appreciation of sound business practices in the handling of property, money, and personnel matters;
- effective representation of the community point of view in policy decisions.

Specific training programs for groups or individuals will aim toward one or more of these overall goals depending on their place in the training program for certain volunteer positions. The purpose and emphases will vary also according to whether a group training program is designed for volunteers doing a similar job, a cross section group, or for members of a work team; for new volunteers or for a group with varied experiences in the agency or the volunteer job.

Goal Setting for a Specific Learning Experience

The trainer, instructor, chairperson, supervisor, or project director functions within the overall training plan and is concerned with the concrete learning experience of one or more individuals. He or she must find out about the needs and interests of the individual or individuals who will participate in a given program—their background, experience, interests, and volunteer assignments in order to translate the overall purpose and organizational goals for the type of training program into concrete, educational objectives of the specific program for which he or she is responsible. These objectives need to be stated in terms of behavioral changes—knowledge, skills, attitudes—which the leader hopes to achieve: What should the learner be able to do or to do better, more easily, more frequently, with less help from a chairperson, director, or staff member?

Content—What Should be Taught—Generally

An education or project committee, the director of volunteers, and/or the head of a department decide on the general content of a conference, course, or institute within the training and development program for a particular volunteer position. They must determine what knowledge and skills needed for a volunteer position or project should be taught in order to achieve the educational goal of a given kind of training program. It does NOT mean that the agency sets up a detailed outline for the program, noting what subject matter is to be covered in which sequence by all leaders responsible for every program of its kind (in agencies which offer, for example, job training courses several times, possibly in different locations during a given term or school year).

What to Teach—Specifically

The basic content needs to be amplified, spelled out, and put into a sequence. A content outline must be developed, in line with the specific objectives for the program and in line with the needs and interests of the specific individual(s). It is, therefore, as important for a president or committee chairperson to discover the background, experience, and interests of a new board or committee member as it is for an instructor of a leadership course to get acquainted with the group; only then is it possible to arrange the content for an induction interview or a group meeting for orientation as a practical learning experience for the participant(s).

Such inquiry should also include what the individual hopes to get out of the particular training program *within the stated purpose or goals;* i.e. within the framework of the program. To get a response to the question of expectations from volunteers with only a little adult education experience is not easy if the questionnaire method as described above is used—unless the purpose of the training program is very clearly stated. On the other hand, the dissatisfaction with their training, especially group training, on the part of the volunteers, is very often a result of unrealistic expectations. Volunteers anticipate, for example, from a brief training session, the detailed technical and practical help which can only be acquired through actual practice; or they are critical of what they call "theory" when a program deals with guidelines or principles for action and not with specific rules and procedures for handling any and all eventualities.

The proposed plan in this book—to have personal contact with every volunteer and to share the information gained with anyone responsible for planning any learning experience for the individual —involves the adult learner actively in the planning of his or her educational program. It enables the leader to select and organize content in line with the needs of the organization *and* of the individual.

Format and Approach

Next, the general format for the training programs needs to be considered: Which is the best way of handling the basic content—individually or in groups? In one session or in a series of meetings? In large or small groups, homogeneous or cross section?

These decisions will, in turn, affect the emphases—and, therefore, the basic content—for the educational program and the goals

as originally stated may need testing and possible modification at this stage of the planning process.

Such practical questions as available facilities and resources in personnel and material also need to be considered: Who is available to handle individual conferences, teach a course, or prepare materials for a home study assignment? What are the advantages and disadvantages of spacing group programs according to locality in order to make the training more accessible to people in different neighborhoods or of having groups composed of people from various backgrounds; of expecting or requiring participation in preservice training or of hoping that volunteers will attend of their own accord? What should be done to help volunteers make up for sessions missed during a course? What are the relative advantages of having a calendar of training events for a program year, and of a flexible plan, scheduling training as needed? What shall be the prerequisites, if any, for participation in certain training programs, especially those handled on an interagency, community-wide, or national basis?

Methods—Techniques—Aids

The next phase in planning for either individual or group learning is to decide how to handle the content as outlined for the specific training program. The importance of active participation on the part of the adult learner is being increasingly recognized by educators in all areas of adult and continuing education—management and employee training, public school and university extension adult education, and liberal adult education. A great variety of teaching aids are available, many of them of the do-it-yourself type and low priced, in addition to the elaborate materials of programmed instruction, simulation games, and teaching machines.

It is very important that the educational leader selects methods and aids carefully considering:

- the objectives for the training;
- the variety of ways in which adults learn and learn best;
- the background and interests of the particular individual or of the individuals in the group;
- his or her own ability to use certain methods and aids;
- the facilities and available equipment;
- the time available.

The leader needs the conviction acquired through knowledge and experience that telling is not teaching and listening not learning.

He or she also needs to beware of thinking that a technique (such as a buzz session) or an aid (such as a film) do the job by themselves; they will be effective only if purposely used, but they can be extremely effective in both group and individual learning situations. Chapter 6 discusses participation methods in detail. Evaluation is dealt with in Chapter 8.

A Worksheet for Planning

Planners of various kinds of volunteer learning experiences—courses, conferences, or workshops—may find the worksheet for planning on pages 59–60 useful in considering these different aspects.

Use of This Worksheet

Title of Training: This should state the title or general description of the training event. It must be a concise statement, either suggested by the group requesting the training or formulated by the trainer. It may be a restatement of an announcement in a training calendar or flyer advertising the event.

Designed for: This should name the kind of volunteers whom one particularly wants to reach: new board members, persons working on the fund raising campaign, or advisers of a youth group. It may be that others will be in attendance also. Since volunteer training should be "functional," i.e. "teaching how to do," not "teaching about," provision must be made to explain the relationship between the key group and any others (for example, sponsors in addition to club advisers if the training is designed for club advisers).

Purpose and Emphases: Here must be stated what the planners hope the participants will gain from the training program—in knowledge, understanding, skills, attitudes. Such clarification will help the planners be realistic and set limitations instead of expecting to cover too extensive a content area in one session.

Probable Size of Groups: This may give a minimum and maximum number or an approximation. It is important as a factor in refining the purpose and emphases as well as content, training methods, room arrangement, and materials needed.

WORKSHEET FOR PLANNING A GROUP LEARNING EXPERIENCE

DATE:

TIME:

TITLE:

DESIGNED FOR:

PURPOSE, EMPHASES:

PROBABLE GROUP SIZE:

GENERAL CONTENT AND FORMAT:

EXPECTATIONS OF PARTICIPANTS:

PERSONNEL NEEDED:

PLACE:

OTHER ARRANGEMENTS:

General Content and Format: The planners should note here *what* should be covered in the training program and some alternatives for *how* to cover it. This information forms the basis for the detailed session planning. This information can also be used to explain the plan to any outside specialists, consultants, speakers, and resource persons.

Expectations of Participants: It is very important to consider what the participants *might* expect from the training; even if there is a system of preregistrations and precourse questionnaires, probably only information about requested content will be gained. But what about approach: Will participants expect a lecture or methods of participation? Will they expect a chance to ask all sorts of minute, practical questions on how to handle a particular situation or will they expect generalities? Interviewers and other experienced volunteers (project or committee leaders) should be well informed about the training program in order to help interpret what might be expected of a particular training program.

Personnel Needed: A special planning committee or a coordinator of volunteers could think about a qualified instructor or leadership team, a keynote speaker, panel members, work-group leaders, and recorders; a trainer of various kinds of resource persons, discussion leaders, audio-visual specialists, etc.

Place: Importance of room arrangements is discussed in Chapter 6.

Other Arrangements Might Include:

Materials needed: such as references, either as a display or for distribution as a bibliography, work sheets or forms, etc., and audio-visual aids.

Special Arrangements and Equipment: this might include information about the physical conditions of the meeting place, chalk board, projection equipment needed or available, etc.

The leader responsible for the actual training event may be the person to fill in the last two sections. Such a work sheet could be given to him or her as the basis for the planning and as an interpretative tool in recruiting assistants, consultants, or speakers for the session. This planning usually considers only three sides of the "framework for planning" on page 49—base, top, and right side. This is important to bear in mind when an organization offers a number of training events with the same purpose and general content—such as Scout leadership courses being scheduled throughout the year and/or in different locations. The same planning sheet can be used by the leaders of different courses, but they must develop their own program for their specific students.

PLANNING AND CONDUCTING A ONE-SESSION TRAINING EVENT

Brief training programs such as one-day institutes or conferences on specific topics can also be set up so that the participants are involved in the planning of the content to some extent. An outline, such as the one following, could be used with a group of 10–75 people who are not personally known to each other, but who may be expected to share a common interest and/or perform similar volunteer jobs. Such a session could be planned for members of one organization or for an interorganizational group. A copy of the outline with sufficient space for note taking—under each heading or on half of the pages—is given to each participant upon arrival.

SAMPLE OUTLINE FOR INSTITUTE OR CONFERENCE

Topic:

Date:

Place:

1. *Introductions*
   - (A) Name and Affiliation
   - (B) Relevant Experiences
   - (C) Expectations

Name tags or table cards are appropriate whenever participants are not known to each other (Question A). Oral individual introductions may become impractical for groups above 30. For smaller groups it is important to have each participant introduce himself, but the introduction should be brief and focused on information relevant to the training program (Question B). For larger groups the leader may ask for a show of hands regarding volunteer positions, agencies, or locations represented. Question C might be taken up in a similar way; the leader could ask a few participants about their expectations and then find out how many others have similar wishes. Comments could be noted on a chalkboard.

2. Brief review of the purpose and plan of the session by the leader.

3. Clarification of terms used. This could be done by the leader or in a discussion with the whole group. It is very important to get some agreement right from the start so that later arguments on terminology and semantics are avoided or at least drastically reduced.

4. Listing of subtopics or aspects of the topics which the planners and session leader consider important. For example, an institute on Committee Management for Chairpersons of Committees might include these topics:

- Kinds of Committees
- Size of Committees
- Committee Members:
  - recruitment, appointment
  - term of office
- Responsibilities of the Chairpersons
- Responsibilities of the Members
  - general responsibilities of all members
  - delegated responsibilities
- Meetings
  - agenda planning
  - discussion leadership
  - decision making, parliamentary procedure
  - follow-up
- Reports to the Parent Body
- Other

These items would be briefly reviewed by the leader, allowing time for the participants to jot down their comments or questions in the space provided.

A quick interest census would then be taken, indicating items

of high and lesser priority on the part of the group. The topics could then be discussed with a reasonable amount of active and intelligent participation because each person would have done some organizing of his thoughts. Sometimes it is also possible to decide tentatively on some timing for the different topics. If such a schedule is noted on the chalkboard, the group can exercise some control—if, for example, some member monopolizes the discussion with his particular problems and other persons realize that time may run out before all high-priority topics are covered as previously planned. If, on the other hand, the whole group, or a majority, become unexpectedly interested in some topic, the leader can ask: "We seem to have come to a very important area; is it your pleasure to explore this in more detail at the risk of not having sufficient time for other topics as planned?" In a group of chairpersons or other group leaders, techniques for increasing group participation, helping groups keep the discussion focused, or handling group conflict, can be pointed out as they are demonstrated.

Setting Up a Comprehensive Educational Program in a Large Organization

The administrative group in an agency working with many volunteers must plan how to meet the educational needs of new and experienced volunteers, of those serving in leadership and in direct service capacities, those helping with special or seasonal projects, and those closely affiliated with the organization and its program or service. Such planning may be done on an annual basis (calendar or school year) or on a semester basis. Some groups have found that the summer months are a very suitable period for special programs such as retreats, resident courses, workshops, seminars, or correspondence study.

While it is desirable to have a flexible training program, many administrative details can seldom be handled on very short notice, but require scheduling, especially if the group does not have its own building and must find rented facilities in the community, or if part-time instructors and other educational leadership must be secured, either from within the organization itself or from the outside.

SIX CHECKPOINTS FOR PLANNING

WHY Review the goals and objectives of the whole organization as well as its current emphases at the start: how can the educational program help in their implementation?

WHAT Review the general training and development needs established for new and incumbent volunteers through the fact-gathering process described earlier in this chapter. Then determine what the volunteers can *learn on their own*—on the job, from co-workers, from supervisors. For example, group leaders may need to know how to keep group activity and individual records. This is learned better when applied to their own group instead of in a class situation.

WHO Differentiate between what most volunteers in certain categories may need *to learn in group sessions:*

- *all incumbents:* refresher training, information about new developments, current trends in the total organization;
- *incumbents in certain offices or jobs:* selected current trends, based on an evaluation of past work methods;
- *new volunteers:* introduction to the organization as a whole, their specific area of activity, their specific job.

WHEN Consider general time factors: are there certain times of the year (or semester) when certain projects take place which are likely to involve large numbers of volunteers new to the organization or the project (annual fund drive or other fund raising project; public relations events such as founder's day celebration; annual meeting; county or state fairs with interorganizational representation, etc.).

HOW Relate needed content and possible types of group learning experiences:

- advantages and disadvantages of longer courses—spread out over a period of several weeks or condensed into several meetings during one week or weekend;
- possibilities of topic-oriented single sessions as part of a series allowing choices or planned as a whole course with a built-in progression.

WHERE Decide on locations for group sessions—consider the pros and cons of taking the training where people are (decentralized) and of bringing people together to a central place such as the organization's headquarters, thereby working with a heterogeneous group.

Other factors to be considered in setting up a comprehensive group training program include:

- the availability of instructors and the pros and cons of having *one* instructor in charge which might allow for greater flexibil-

ity in planning and conducting the program, or of *team* teaching which might provide for leaders with greater competence in various content areas;

- the desirability of a workshop, seminar, or discussion approach becanse the participants are likely to have some knowledge and/or experience, versus a more structured training "course" because most of the content will be new to the students;
- the availability of audio-visual aids, equipment, and personnel qualified to handle it (or ready to take training and qualify for it), facilities permitting informal gronpings or limiting the group into a more formal seating arrangement of a given size —the latter may be suitable for certain kinds of programs although it makes it more difficult to achieve active group participation.

Planning Interorganizational Training

In planning educational programs sponsored by more than one organization, general plans are made by a committee representing various community groups. Such a committee's first task is to find out whether programs similar to the one contemplated are available in the community or have been conducted previously, were discontinued, and why.

The Child Study Association of America[1] suggests that a planning committee for a parent education program proceed as follows:

- agree on the program's purpose (general information, specific problems, etc.);
- decide on the audience (parents of a specific age group, parents only, or also teachers, etc.);
- determine the type of program which will best achieve the purpose (single meeting, series of meetings, size of group, degree of audience participation);
- explore available community resources (consultants to help plan as well as conduct the program may be found in libraries, high schools, or departments of a college, university, government);
- take care of detailed arrangements (meeting place and time, registration, charge or fee, if any, publicity);
- plan for evaluation.

Sometimes a public school adult education department can be interested in co-sponsoring an educational program designed for volunteers in one or more organizations. A social planning council,

for example, can offer a training program for youth group leaders, hospital volunteers, or board members from all kinds of voluntary agencies as part of the adult education program of the school system. Red Cross chapters frequently conduct First Aid, Home Health, and Water Safety courses with such joint sponsorship. In this case, the Red Cross assumes responsibility for course content, number of sessions, educational materials, and instructors; aside from promotion there is no need for interorganizational planning.

In other programs, goals and emphases need to be determined by the cooperating groups and standards of instruction set by the public school or evening division of a college. A school or college representative should attend meetings of the planning committee at an early stage of the planning process so that cooperative relationships are understood by all concerned. For example, the public school adult education system may have a strict regulation for cancellation in case of insufficient registration. The necessary minimum number of students may vary and depend on the instructor's honorarium, needed supplies and equipment, and other direct costs. The planning committee must either make some provision for subsidizing the cost of the program or decrease the cost by securing resource people who require a lower or no honorarium, and by using fewer films with lower rentals or charge the students for textbooks if the registration falls short of the break-even point—as alternatives to cancellation of the program.

Such community volunteer training programs are often planned as special events in the curriculum of the school or college rather than on a regular basis. Local Volunteer Bureaus or Voluntary Action Centers are in a particularly strategic position to sponsor or cosponsor interagency training for volunteers or for those working with volunteers. With assistance from a university's social work department[2] or extension division[3] training needs can be determined in a systematic research process, including questionnaires and/or interviews with potential participants.

The latter study served as the basis for setting up a training program for coordinators of volunteers after interviews found that there appeared to be a lack of administrative skills—particularly training, recruiting and selection techniques, report preparation, and budgeting procedures. On the other hand, the coordinators expressed a need for training in human relations skills enabling them to deal more effectively with problems of the volunteers, facilitating better communication with superiors, other agencies, and the public.[4] After considering various alternatives, a 12 three-

hour-session course under the auspices of the Community Education branch of the public school system was set up with an emphasis on basic skills needed in the various aspects of the coordinator's job. The course was to be "presented in an environment conducive to small group discussion and comfort . . . chairs should be comfortable and movable . . . each three-hour session should be broken up by at least one 20-minute break. . . ."[5] An overview of this program which shows the double focus on knowing and doing follows (pages 68–69).

Organizational representatives must make sure that the actual students for community-wide training programs are carefully selected and prepared so that they understand how the special programs supplement what the agency itself has to offer, how their specific learning needs can be met through a particular interagency program, and how they can share their learning with others in their own agency or organization. Such sharing and implementation "back home" is facilitated when an agency team, rather than only one representative, attends an interagency training event, and when the training program includes action steps for application to their own agencies. Joint discussions of staff-volunteer relations, for example, can be most fruitful if the participants include such teams as group leader or committee chairperson and their staff advisor or board president and the executive director from various agencies or organizations.[6]

The planning committee for such interagency training must be representative of *both* the volunteer and the professional points of view. A Workshop on Community Planning techniques had a broadly representative planning committee: agency executive, board volunteer, staff worker, social work educator, and representatives from the local United Way, Planning Council, and Welfare Department. At its second meeting, the "Worksheet for Planning a Group Learning Experience" was used to develop the program as shown on page 70. Responsibility for working out details was delegated to individual members of the enlarged planning committee:

- contacting suggested speakers;
- writing up the case;
- preparing instructions for case discussion groups for facilitators;
- preparing guidelines for the five discussion leaders so that planning processes and techniques would be discussed rather than the actual project evaluated;

THE TRAINING PROGRAM PLAN

Week Number *Topic*	*Subject Matter*	*Handout*	*Assignment*	*Resource Person*
1. Registration	Introduction and overview of the course	Binder to hold all distributed materials and orientation to course handout	Read material for next session	Program Coordinator
2. Recruiting Process	Objectives, manpower requirements, job descriptions, how and where to recruit	Two or three pages on major topic, with a "how to" approach	Each class member will be expected to write up a job description	Person skilled in recruiting at the professional or volunteer level with ability to relate theory with practical examples
3. Interviewing	Techniques, what the interview should accomplish; video tape of simulated interview; interview role play with use of video tape feedback; diseussion of selection and placement	A paper on the do's and don'ts of the interview	From experience, each member will relate faults and biases inherent in interviewing	Specialist on interviewing procedures and use of video tape feedback
4. Orientation	Methods of orientation, problems encountered with new volunteers, reviewing and reassigning the volunteer	Explanation of basic aims and methods of orientation	Develop a training program for the volunteers in your own agency	An individual who is involved in orienting and directing new volunteers
5. Actual Training Methods	How to assess training needs, an overview and discussion of advantages and disadvantages of the use of various training methods	Outline and description of each method with advantages and disadvantages	Concentrated research on one method	Training director or supervisor; teacher or professor
6. Human Relations I	Role playing episode developed from a case related to voluntarism: use of video tape feedback; tie in what this technique offers vis-a-vis communications within the organization and between people	Two or three pages on role playing; use, advantages and disadvantages	Each participant will be expected to submit their personal feelings about the role play, what	Skilled human relations trainer

THE TRAINING PROGRAM PLAN

Week Number	*Topic*	*Subject Matter*	*Handout*	*Assignment*	*Resource Person*
				they learned and how it can be applied to their organization	
7.	Motivation	Basic motivational theory and how it relates to the volunteer, the problems of maintaining motivation without money as an incentive; the need for recognition	Two or three pages on motivational theory related to voluntarism	Rewrite a poorly presented brief for oral class presentation	College professor
8.	Writing and Presentation of Briefs	Review of assignment: a "how to" approach to writing briefs; the need for salesmanship; effective listening	Notes on briefs	Prepare two press releases concerning their agencies' current activities	Teacher of business English
9.	Public Relations	How to use the media; how to prepare press releases; relations with the Board	A "how to" approach to contacting and using the media	No assignment	Public relations officer or news representative
10.	Bookkeeping and Managerial Skills	Basic budgeting; keeping personnel and financial records; office supervision; delegation	Overview of budgeting techniques, and two pages on managerial skill and behavior in offices	Students are given a fixed amount of funds to budget and plan	An experienced office manager with a background in management information systems
11.	Human Relations II	Communication leadership, conflict and cooperation	Recommended reading list	Read in the area	College professor
12.	Final Session	Evaluation questions and discussion, social evening	Certificates of completion	Work effectively	Program coordinator

- handling promotion and publicity;
- setting up registration, name tags, etc.;
- hospitality, room arrangement, etc.

Students in a college course in community organization were trained as recorders for the two sets of group discussions; staff members from different agencies or volunteers could also be recruited for such a role.

The original planning committee decided on an informal, continuing follow-up and evaluation in preference to end-of-meeting comments, also using the notes taken by the students; a summary report was mailed to all participating agencies and organizations.

TITLE: Techniques for Community Planning—A Workshop.

DESIGNED FOR: Community Volunteers (current and potential), private and public agency staff and executives, and consumers of services.

PURPOSE: To provide decision-makers with a fresh view of basic planning steps through small-group involvement in the practical application of planning techniques.

EMPHASES: Participation of those concerned with and affected by administrative decisions in interagency planning.

PROBABLE GROUP SIZE: 75–100

FORMAT:
- presentation by keynoter or two speakers;
- small group testing of the technique using a fictional model (case);
- analysis of five actual current community projects in small groups;
- summary and question period following lunch.

PERSONNEL NEEDED: one or two speakers
- facilitators for group discussions of model;
- discussion leaders involved in planning recent or current interagency projects;
- leader for question period.

NOTES

[1]Child Study Association of America, Inc., *When Parents Get Together—How to Organize a Parent Education Program* (New York: Child Study Association of America, Inc., 1964, rev. ed.).

[2]Tessie B. Okin and Carolyn F. Wiener, *Planning, Implementing, Evaluating: A Workshop for Directors of Volunteers* (Wash-

ington: National Center for Volunteer Action, December 1973). Funded by ACTION Grant No. 37–002.

[3]John C. Anderson and Robert B. Dougans, "The Development of a Training Program for Coordinators of Volunteer Programs," *Volunteer Administration*, Vol. VII, Nos. 2–4, June 1973, p. 1.

[4]Ibid., p. 2.

[5]Ibid., p. 4.

[6]Cf. Eva Schindler-Rainman and Ronald Lippitt, *Team Training for Community Change* (Riverside, California: University of California Extension, 1972).

CHAPTER

4

Beginning learning experiences—recruitment and placement

> We all share the conviction of the Center for a Voluntary Society that conditions are ripe today—and will be even more ripe tomorrow—for a great increase in voluntary activity and widespread citizen participation in the renewal and enrichment of our national life. —VLADIMIR A. DUPRÉ*

There are many reasons why people volunteer to serve in agencies, give time and effort to causes, and accept positions on boards and committees. There is sometimes a *self-interest* motivation—prestige and status, desire to obtain business or personal contacts, family tradition, and community obligations. In other instances, the desire to be of help, to show concern for others, to promote a cause or to prevent a wrong, indicates a more *selfless* form of dedication. The underlying motivations are complex and varied and cannot be discerned without long inquiry and study. Yet to understand and adapt the motives or reasons why an individual decides to volunteer his or her services is important to the successful utilization of that individual's talent and skills.

Often the motivation is twofold: (1) a businessman is urged to take "company time" to serve on a community board, and (2) he has a deep personal concern about drug addiction among teen-age

* Executive Director, NTL Institute for Applied Behavioral Sciences, 1971.

youth. The status pressure of the job and possible promotion pushes him in one direction while a long-time desire "to do something about the drug problem" in his community pulls him in another. Both pressures reinforce each other, however, and successful recruitment and placement may resolve the dilemma. Should his talents and abilities be guided toward direct service in an agency concerned about drug rehabilitation, or would these talents and skills be best utilized in a decision-making responsibility? Further, which responsibility will insure his continued support and involvement?

A high school girl interested in exploring career opportunities in the field of law wants to volunteer a few hours a week in a local government agency or legal aid society. Her reason for volunteering appears focused on self-interest. At the outset, she intends to gain something for herself out of the experience. Proper placement and supervision, however, may see her *giving* as well as *taking* as the volunteer experience offers a dimension of learning not perceived at first.

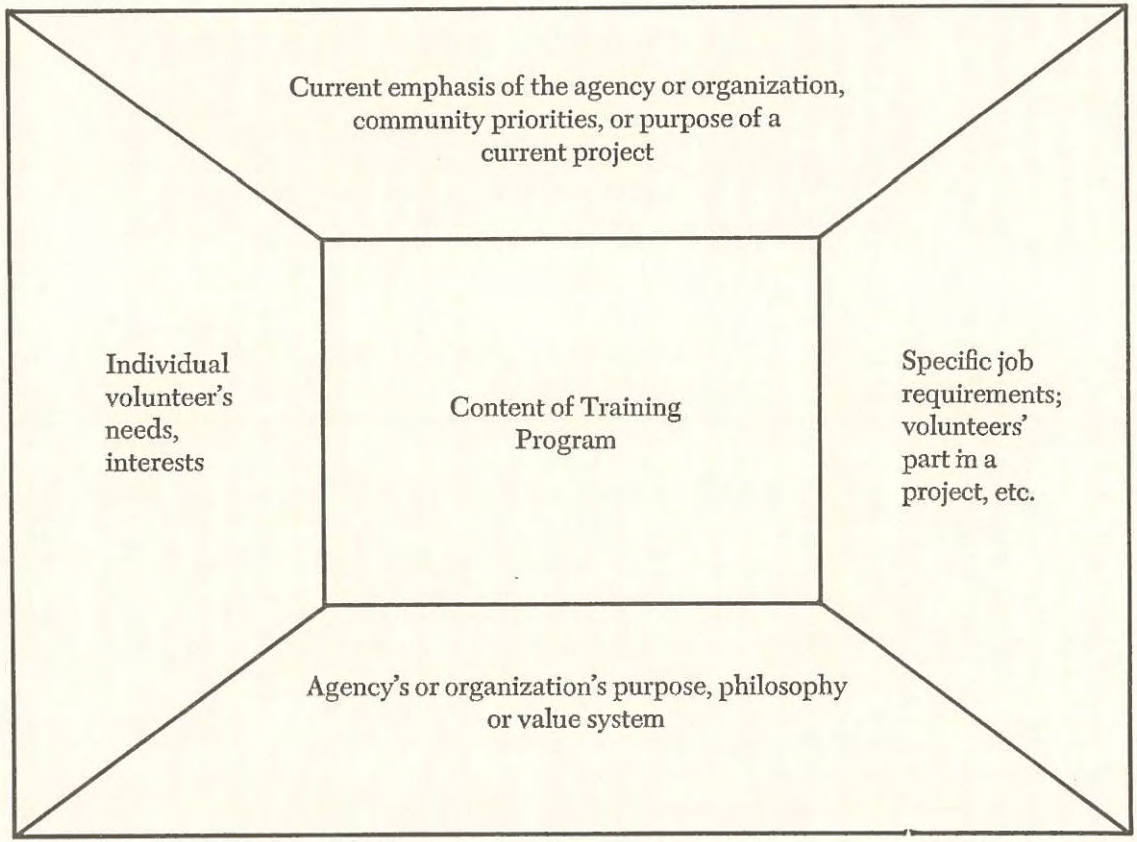
It is important, therefore, that the beginning learning experiences involved in recruitment, interviewing, and placement are part of the individualized learning program for every volunteer as described in Chapter 2.

Needs and Expectations of the Volunteer

When a person is being recruited, certain questions have to be borne in mind. Are the expectations and needs of the volunteer and the needs and expectations of the agency in line with each other? How can these needs and expectations be appropriately explored at the recruitment interview? Will the opening talks about the organization or the job lead to an understanding of, and a readiness for, further learning by the individual? Will those first contacts be integrated into an individualized program of training sponsored by the organization itself? Unless these questions can be answered in the affirmative, the recruitment process will not lead to the proper involvement of the individual in the agency nor to the future commitment of that individual.

Factors in Volunteer Recruitment

The following diagram (page 74) illustrates the complexity of factors affecting the recruitment of volunteers and their future participation in agencies and institutions. This diagram may serve as a teaching aid (chalkboard or flipchart) as, for example:


Current emphasis of the agency or organization, community priorities, or purpose of a current project
Individual volunteer's needs, interests
Content of Training Program
Specific job requirements; volunteers' part in a project, etc.
Agency's or organization's purpose, philosophy or value system

(a) Recruiting an individual for a particular agency such as a new Drug Rehabilitation Center sponsored by a national voluntary organization. The individual concerned might be the businessman described earlier. The forces of enlightened self-interest (status and prestige on the job) and his desire for service ("do something about drugs") could be linked together, as could the factors of community (public opinion) and family (help for child, a relative, a friend). The socio-economic factor may not be of concern here unless there has been a long-standing tradition of volunteer service in his family or social class. The image of the institution, however, may be a negative one in the community. Could the individual change this? Would he be interested in doing so? As a decision-making volunteer (board member) he might see the challenge—and want to do something about changing the image in the community power structure.

In the process of talking to the points on the diagram, in this instance a great deal of orientation has been going on: wider knowledge of the community, the need for the service, exploration of the problems involved, the responsibilities of a board member, the institution's working relationships.

(Incidentally, the diagram can be used with groups as well as with individuals: new staff, recruiting teams, committees, and boards of directors.)

(b) The diagram can also be used as a discussion "kickoff" for a recruitment drive on how to find the type of individuals needed for a specific agency. What are the blocks to recruiting for this agency? What has been the experience in the past? What aspects should be stressed at the present time? Where can these individuals be found? How can they be challenged? What has been the "image" of volunteering in the agency: positive, negative, or indifferent?

(c) The diagram can be used for training professional staff on the overall volunteer service of the agency by expanding on the issues of why people volunteer; the volunteer as an individual; community need and agency image; future commitment of the volunteer as related to motivations for serving; need for realistic working relationships between volunteer and staff. (Fill in or adapt background information on the specific agency and its needs.)

It will be found that the recruitment process holds many unknown factors, and yet it is the discovery of those factors that initiates the educational process itself. Much of what an individual brings to an agency and much of what is perceived about the

agency in the early stages of interest will be important to future development and personal commitment.

METHODS OF RECRUITMENT

First contact with the recruit can take place in three different ways:

1. *Self-Recruitment (volunteering on own initiative).* There are individuals who are strongly motivated and sufficiently informed to contact either a member or the headquarters of an agency itself or a central volunteer placement group and offer their services. This action may be triggered off by a personal need for community activity—for example, the mature woman whose family no longer requires her full-time activity as homemaker, or a retired worker—or by gratitude for help which a member of the family has received by an agency, such as the Arthritis Foundation. It may be the desire to share hobbies and favorite activities with others, as in the case of a leader of a youth group or club in a neighborhood center, or the search for understanding and cooperative help in dealing with their own problem which brings parents to a local chapter of the National Association for Retarded Citizens.

In every case the individual has a definite image of the agency or service for which he is volunteering on his own, even though a general appeal through the mass media (such as a city mayor's appeal for volunteers on television) has come to his attention at the right psychological moment. He also has some notion of a possible contribution he can make, although it may be that his self-estimate of his abilities is as unrealistic as his idea about the agency's program and services. Wise counseling is required immediately to bring volunteer and agency to a harmonious start. The agency must avoid disappointing the highly motivated volunteer by "not having the kind of position" which he seeks. On the other hand, to produce "made work" for a volunteer must be avoided.

2. *Informal Recruitment.* The active and satisfied volunteer or agency member can be an excellent recruiter—his enthusiasm is contagious and some organizations build a "recruitment drive" around this enthusiasm. This means that any member or volunteer becomes an "image maker" for the organization and that prospects arrive with some preconceived ideas about opportunities for service or help needed. It is advisable, therefore—since these recruitment efforts are spontaneous and valuable because of this very fact —to promote recruitment for *some* activity in the agency, not for any

particular position or service with which the "recruiter" happens to be familiar and to avoid setting up complicated recruitment and referral procedures.

3. *General Recruitment.* Newspapers, radio, television, posters, and billboards are some of the ways used for general recruitment. These need not be routine in approach but can be creatively styled to reach a community-wide audience. For example, a Midwest city newspaper runs an attractively boxed item with the logo of the Voluntary Action Center as a masthead. Below it runs a message such as:

Volunteer Alert

In all areas, we need each other—we need to be of use and others need to know they are esteemed by us; that we are not whole without them, nor can our humanity be perfected unless we help others live and grow.

Telephone Counselors: If you are interested in crisis counseling, here is a great opportunity to sharpen your skills through a fine training program and to provide a much-needed service.

Retired: Have you had experience in budget counseling? A downtown agency needs a counselor to help people with budgets and situations dealing with money.

Needed: Men to work with the juvenile probation volunteer aide program. This can be done at your convenience, and a training program is offered. This is a program that is much in need of male volunteers who want to help the youth of the community.[1]

A large metropolitan city's Voluntary Action Center uses posters and a brochure to attract college volunteers with the question: *What Am I Going to Do?* A puzzled student is asking this question on the cover of the brochure while the inner fold contains the sentence: CONNECT TODAY WITH THE REST OF YOUR LIFE—VOLUNTEER! The message is slanted toward trying out various options regarding a career or vocational interest and in gaining experience although not yet qualified for a paying job.[2]

Other appeals can be made on a continuing basis over a local radio station with volunteers being interviewed, discussion panels on agency programs, or direct recruiting for specific needs.

National Volunteer Week (usually the second or third week in April) may invite the interest of television stations to use programs structured around Volunteer Recognition Day, Human Needs in

the Community, talk shows with local personalities on where and how to volunteer, as well as on various types of human interest stories suitable for dramatization (see *Voluntary Action News*—January/February, 1975—for types of ad campaigns including car cards, outdoor posters, billboards, radio, TV, consumer magazines, business press, and newspapers).[3]

General Recruitment

An agency might promote this kind of recruitment with a simple appeal such as this:

EVERYONE A RECRUITER—THREE SURE STEPS!

1. Think of someone whom you would like to see as a member or volunteer in our agency—a former member; one of your neighbors; a friend, a church, lodge, club, or union member; a co-worker; a newcomer to our town who is not yet active in other groups; a student or recent graduate interested in community service; an active or retired businessman or woman.
2. Secure your prospect's willingness to discuss immediate or future volunteer opportunities with one of our officers (or special recruiters, interviewers, staff members).
3. Send in his or her name, address, and phone number as well as your own so that we can call you for more information before contacting your prospect.

Such a recruitment drive should be limited in time because the momentum wears off, but it may also work out as an annual event.

Planned Recruitment by Specially Selected and Prepared Recruiters

In this type of drive, recruiters should be selected on the basis of certain qualifications, which are:

- General knowledge of the agency—purpose, aims, types of jobs for volunteers, training, and help available;
- Conviction and enthusiasm about the agency's aims and program;
- Ability to highlight those aspects of the agency's program, plans, and needs which relate to the prospect's special interests and/or general qualifications;
- Willingness and ability to listen, to encourage the prospect to ask questions, and to communicate a feeling of confidence and sincere interest in him;
- Knowledge of when and how to refer the prospect to an appropriate person in the agency for a follow-up conference.

Recruitment by Volunteer Bureaus and Interagency Drives

Often a Volunteer Bureau or Voluntary Action Center will serve as a clearing house for all volunteer jobs in the community. Such bureaus coordinate the recruiting for established agencies and institutions, although they often provide support and encourage-

VOLUNTEER REQUEST FORM[4] DATE_____

PLEASE TYPE OR PRINT

Complete and submit one volunteer request form for each volunteer's job (e.g. tutor, recreation, arts) to be listed. Use the back of the form for additional information.

AGENCY PROFILE

Please enclose any literature that describes the nature of your agency. The more we know about the agency and its programs, the more helpful we can be in trying to refer the volunteers you have requested.

Material enclosed Yes _____ No _____

1. Agency _____
2. Address _____
   STREET BOROUGH ZIP
3. Public _____ Private (Nonprofit) _____
4. Description of Agency, what you do and for whom: _____
   _____
   _____
   _____
   _____
5. Coordinator of Volunteers _____
   Hours available for contact _____
   Telephone _____
   Assistant Coordinator _____
   Telephone _____
6. Do you ever volunteer assignments that:
   a) Involve work that can be done at home
      Yes _____ No _____
   b) Are of short duration
      Yes _____ No _____
7. Nearest public transportation:

JOB AVAILABLE

1. Description of assignment: _____
   _____
   _____
2. Duration of assignment:
   From _____ To _____
3. Requirements:
   Medical exam Yes _____ No _____
   references Yes _____ No _____
   Others, please list: _____
4. Training provided: Yes _____ No _____
5. Work Location if different from your agency
   Address: _____
   Benefits: Carefare Yes _____ No _____
   Lunch _____ Yes _____ No _____ Others _____
6. Number of volunteers needed for this assignment: _____
7. Volunteers can work: Daytime (9–5)_____
   Weekend _____ (Evening after 5) _____
   List specific days and hours volunteer can work on back of form.

VOLUNTEER WANTED

1. Personal characteristics needed or desired: _____
   _____
   _____
2. Academic level: _____
3. Age: _____
4. Prior experience (if necessary) _____
   _____
   _____

ment to new groups by developing volunteer job descriptions and maintaining up-to-date files on current needs.

It is advisable to supply a Volunteer Bureau with the necessary information on your agency and its service needs, and to check regularly on referrals. If a volunteer is not placed, the Bureau

should be notified immediately. Volunteer request forms and referral cards are made available for this purpose. Prompt follow-up and reporting are important aspects of this type of general recruitment. (See Volunteer Request Form.)

Interagency recruitment drives are often "crash" programs in which all agencies in the community cooperate by pooling advertising or personnel for an intensive campaign to obtain large numbers of prospects. Such a drive may be held annually on a specific day, week, or month; but the time period should be limited. Or an annual volunteer fair might be sponsored with booths staffed by different agency personnel and displaying information about the agency's work and volunteer opportunities. An event such as this promotes cooperation rather than competition among participating agencies regarding recruitment of volunteers, and provides some identification with the Voluntary Action Center and the volunteer movement, not just a specific agency. The fair can also provide the volunteer with "a first step" in his or her learning program. In large communities volunteer fairs could be held in different neighborhoods.

The Recruiter

The key person involved in recruiting is of course the recruiter or recruiting team. Understanding the recruitment process is crucial to effective recruiting as the recruiter is usually the volunteer's first working contact with the agency. A great deal of information about the agency and about its volunteer service is communicated at this time. Therefore, the recruiter should understand clearly that the job will include the following:

- Become informed about the tasks and responsibilities needed and what types of individuals can fill them effectively.
- Locate and contact qualified or potentially qualified volunteers.
- Establish and maintain contacts with appropriate community sources.
- Conduct short-term conferences (which can be held anywhere —in an office, over lunch, before or after a meeting, via telephone, etc.) to:
  —interpret the agency and interest the volunteer in applying or serving;
  —explain the general types of services needed;
  —answer questions of an informational nature.
- Refer the volunteer to the appropriate individual or unit for follow-up.

In addition to individual contacts, recruiters may also approach other groups and agencies with common interests and aims; in this case, they will need skill in public speaking. It is important, however, that following a presentation to a group, there is opportunity to talk with any individual members who indicate an interest in exploring possible volunteer service.

Briefing Packets for Recruiters

Here is a list of suggested items for such packets:

- Agency information—a current fact sheet on "what it is, what it does."
- Short history or significant highlights of the program.
- List of officers, board of directors, and professional staff.
- Annual or biennial report.
- Calendar of events for current year.
- Copies of handout material, such as:
  - Weekly or monthly publication
  - Brochure on fund raising or recruitment
  - Membership requirements or procedures
  - Program of a special event or annual meeting
  - Brochure on "Services to the Community"
  - Answer Sheet re: Frequently Asked Questions

Not many organizations will have individuals whose specially delegated position is that of a *Recruiter*, but any organization can prepare recruitment packets and make them available to officers, committee chairmen, public relations committee members, and others who possess the interest and qualifications mentioned.

Volunteer Bureaus and Interagency Coordinating Centers can prepare packets or kits that contain a list of agencies in the community complete with addresses, telephone numbers, hours when open, and person(s) to contact. A list of current volunteer opportunities should also be included and updated frequently. Informational brochures on the agencies, application and referral forms, sample list of volunteer responsibilities, and other pertinent information on the purpose and program of the service, would be useful to include. While the bureaus and centers are usually alert to various programs in the community, it is advisable to keep them informed about new developments and services. New organizations should take the initiative in contacting the local bureau or interagency center.

The Interview

The process of interviewing entails the assessment of the aspirations and the skills of the recruit as well as guidance in the light of the needs of the agency and the interests of the volunteer. The interviewer reviews the volunteer's qualifications while reassuring the individual that the agency is concerned about how best to utilize the volunteer's skills and abilities. Thus the agency, through the interviewer, endeavors to find out *with* the volunteer how the individual can make the best contribution and where it can be made. This is different from an employment interview in which requirements for a definite job pattern are investigated in comparison with the qualifications of other applicants. This does not mean that job responsibilities for the opening should not be spelled out; indeed, such descriptions are necessary, as will be seen in Chapter 5. It DOES mean that selection is interpreted as selecting the assignment but never ruling out *the person* who volunteers.

10 Points for Interviewers

- Remember there are usually two volunteer applicants present at an interview: the volunteer as he really is, and the volunteer as he would like to appear.
- Keep in mind your main purpose during the interview is to obtain information about the volunteer.
- Prepare a list of simple, informal questions, or "implied," not actual questions, that will accomplish the purpose of the interview.
- Fiud out how the volunteer feels about the job and what his aspirations are concerning the agency.
- Be as informed as possible on all aspects of the agency's work and its present and future objectives.
- Allow time for pauses and reflective moments during the interview. Don't "pressure" the volunteer.
- Develop skill in summarizing ideas and feelings on the basis of understanding, not on the basis of accepting or rejecting the information.
- Be a good listener. Watch for "clues" communicated by gestures, tone of voice, and facial expression.
- Be prepared to interpret to the volunteer the opportunities available in the agency for participation and development.
- Keep a written summary of the interview, using a recording form if available.

It is, of course, also possible to combine these jobs and have a recruiter interest an individual in giving service to the agency (recruitment) and to assess the prospective volunteer's present and potential qualifications (selection).

If two persons are involved, prompt referral and clearance procedures are essential. The following worksheets may serve as aids in this process.

SELF-INVENTORY OF SKILLS AND ABILITIES

This score sheet can be helpful to the interviewer in discussing with the volunteer what he or she would like to do. The interviewer may note that the box under *Using Statistics and Numbers* indicates "do very well" but the individual's full-time job is in research or accounting. The individual may not (and perhaps should not) be interested in volunteering in this capacity but rather in something quite opposite.

The interviewer, however, may keep this in mind should an emergency need for these skills arise in the future. The volunteer may have been placed in a congenial assignment meanwhile but be willing to help out when requested.

How to use:

SELF-INVENTORY OF SKILLS AND ABILITIES

This individual score sheet is to be completed by the volunteer at home or immediately preceding the interview. It is advisable to encourage the volunteer to add items or to comment freely. Additional pages may be used, if necessary.

I CAN DO THIS:	VERY WELL	WELL	SO-SO	NOT AT ALL	COMMENT
Speak and persuade: skill in expressing ideas and in communicating; ability to sell and influence others.					

Teach and train: skill in interpreting ideas; to conduct sessions and relate to people; lead discussion; use AV materials; study and learn on a continuing basis.					
Draw and paint: skill in sketching, drawing, and painting; ability to decorate, make hand crafts; take pictures.					
Sing, dance, play an instrument: skill in choral and solo singing, playing an instrument; dancing, leading a musical group; teach folk dancing; perform for an audience.					
Record-keeping and reporting: skill in filing; keeping neat, accurate records; ability to make concise reports; take minutes of meetings.					
Using statistics and numbers: skill in using numbers and in checking financial reports; ability to collect and analyze figures; to compute and estimate.					
Other skills and abilities: (List or describe here)					

INTEREST AND HOBBY CHECKLIST FOR VOLUNTEERS

An informal checklist such as the one listed below will assist the new recruit in clarifying his or her own interests in relation to the job. The checklist can be a device used for a "first" conversation between the volunteer and recruiter or mailed as a follow-up to a meeting.

Groups or individuals can use the checklist and, if desired, it may be modified or adapted according to the needs of the particular group or organization.

WHAT I LIKE TO DO	ALL THE TIME	MOST OF THE TIME	A LITTLE	NOT AT ALL	COMMENT
Reading and writing					
Taking responsibility					
Speaking to groups					
Meeting new people					
Dancing and singing					
Sorting papers, keeping records					
Typing					
Fixing machines					
Drawing and sketching					
Camping, living out-of-doors					
Research and analysis					
Swimming and hiking					
Working "math" problems					

INTEREST AND HOBBY CHECKLIST (cont'd.)

WHAT I LIKE TO DO	ALL THE TIME	MOST OF THE TIME	A LITTLE	NOT AT ALL	COMMENT
Selling or contacting people					
Experimenting with mechanical devices					
Making things; repairing					
Teaching					
Cooking and entertaining					
Designing clothes and decorating					
Making decisions					
Presiding at meetings and events					
Acting in a play					
Directing a dramatic production					
Leading a discussion group					
Driving a car					
OTHER (list or describe here):					

How to use:

OPINION SHEET—SKILLS AND ABILITIES

This score sheet is to be completed by the interviewer in consultation with the volunteer. The Self-Inventory and the Hobby and Interest Checklist could be reviewed in advance of the interview and used for a productive discussion with the volunteer. The Opinion Sheet can then be sent with the Referral Form and provide significant background for proper placement.

VOLUNTEER'S SKILLS AND ABILITIES	HIGH	AVERAGE	LOW	NONE	COMMENT
Speak and persuade: skill in expressing ideas, in communicating; ability to sell and influence others.					
Teach and train: skill in interpreting ideas; in conducting sessions and relating to people; leading discussion; use audio-visual materials; interest in studying and learning.					
Draw and paint: skill in sketching, drawing, and painting; ability in decorating; making hand crafts; taking pictures.					

VOLUNTEER'S SKILLS AND ABILITIES	HIGH	AVERAGE	LOW	NONE	COMMENT
Sing, dance, play an instrument: skill in choral or solo singing; playing an instrument; dancing; leading a musical group; teaching folk dancing; performing for an audience.					
Record-keeping and reporting: skill in filing; keeping neat, accurate records; ability to make concise reports; take minutes of meetings.					
Using statistics and numbers: skill in using numbers and in checking financial reports; ability to accurately collect and analyze figures; to compute and estimate.					
Other skills and abilities:					

REFERRAL FORM

(Interagency or Intra-agency)

To be filled out as soon as possible after the interview and to be given or mailed to: _____
(Name of person responsible for placement)

Name of Prospect _____ Date of Interview_____

Address _____ Phone_____

New to the Institution or Agency	( )	M ( )	Age (estim.)	Under 21	( )
				22–40	( )
		Sex		41–60	( )
New to Volunteering	( )	F ( )		Over 60	( )

1. If you can, state your first impression of this prospect in a few key words. Do this quickly, relying on your instincts.

2. Special interests:

3. Special skills, if any:

4. Community volunteer experience, if any:
   Kind of organization(s). What did he or she do?

5. Work experience, if any:

6. What does the individual know about the institution or agency?

7. What could he or she do or be willing to do for the institution or agency?

8. How much time does he or she have available?

9. In your opinion, is this person one whose motivation, experience, and education can be developed and used for leadership in the agency?

10. Complete the following if this prospect is familiar with some aspect or activity of the institution or agency:

    a. What was his or her experience?

    b. How did he or she feel about it?

    c. Did the experience motivate this individual to volunteer?

11. Any additional comments:

Interviewer's Name _____

ADDRESS PHONE

INTEREST AND HOBBY CHECKLIST FOR VOLUNTEERS

Here the interviewer may match the volunteer's interests and hobbies with a variety of in-service or program responsibilities. There may be many areas where these assets can be utilized but ones that the volunteer may never have known about. If the interviewer has several job responsibilities available, these might be discussed with the volunteer in terms of the score sheet.

The Referral Process

These three forms are tools to assist in the proper preplacement interviewing and actual placement of the individual, and to provide information for the guidance of the person(s) responsible for getting the recruit started. Any one of these forms may be modified or adapted to meet individual or agency requirements. Their main purpose is to help relate the viewpoints of the volunteer and of the agency right from the start.

It is important that the persons with whom the new volunteer is in contact—recruiter, interviewer, officer, staff member—keep in mind the individualized training plan for the possible positions which are being considered for and with the individual (as described in Chapter 2). But it is equally important that an appropriate sequence of steps be used for each individual case.

Placement

The process of recruitment, interviewing, and placement of volunteers varies according to the respective volunteer responsibility and the individual's qualifications. In order to see clearly this factor of variability, let us consider several volunteer responsibilities, such as:

MOVIE PROJECTIONIST—Direct Service or Program Volunteer

Responsibility: to show movies for hospital patients' evening entertainment.[5]

The recruiter looks for an individual who is alert, personable, with knowledge of how to run a projector, and available from 7–9 P.M. two nights a week. A face-to-face conference is held and references checked.

After referral to the Director of Volunteer Services or to a

person responsible for Recreation, this individual will explain the duties more fully. These include assembling the equipment and taking it to a designated floor. Two people usually are assigned to movies so that one can act as assistant and help with arranging seating and greeting patients. After the showing, the equipment is returned to storage and patients are escorted to their rooms. A tour of the hospital area is then taken and the new volunteer is introduced to the charge nurse and other personnel. The interviewer or staff member may ask the volunteer to run the projector for a trial showing, explaining where to obtain assistance if necessary (such as bulb replacements, spare parts, extension wire, etc.).

ADULT PROBATION AIDE—Direct Service or Program Volunteer

Responsibility: to work with men and women on probation or parole with a state agency. Comprehensive training program provided and required for all volunteers.

Here the recruiter looks for an individual with a mature and open attitude toward people, interested in working long and patiently, and willing to take training.

After referral to the state agency's staff member or director of volunteers, the interview proceeds more in depth and may require several face-to-face conferences. Many people romanticize crime and prison life and see themselves in the role of instant-change agent. Others sometimes have ulterior motives in wanting to work with parolees; therefore, the interviewer has to conduct a careful screening of all candidates. The interviewer will also have to watch for "clues" as to personality traits, ease in communicating, relaxed and nonjudgmental attitudes toward crime and delinquency, possible derogatory comments about groups and individuals, ability to practice confidentiality.

The required training program will also act as a form of placement since the participation of the new recruit in the program can be observed and evaluated over a period of time.

Decision-Making Responsibility: Officer or Board Member

The recruiter here is probably a member of the Nominating Committee. It is the responsibility of Nominating Committee mem-

bers to ask prospective nominees for officers and board membership to give permission for their names to appear on the slate. Before this takes place, however, an informal face-to-face conference should be held:

Nominating Committee Guidelines

- Provide ample time to talk informally in relaxed, pleasant surroundings. Allow no unexpected visitors or telephone calls to interrupt the conference.
- Have all the information you need to give the prospective nominee a picture of the organization (if new) and a review of the responsibilities involved.
- Explain why you think the prospective nominee is qualified, and for what other types of jobs as well. (The prospect might like to indicate a choice.)
- Encourage a genuine exchange of views and ideas during the conference. Keep a checklist of questions or points you may wish to discuss.
- Listen for "clues" and invite expressions of opinion.
- Be frank and honest in answering all queries but do not minimize your own interest and enthusiasm. (This can be contagious!)
- If the prospective nominee is interested but noncommittal, don't "pressure." Allow time for a "thinking it over" period, and make an appointment for a follow-up conference in the near future.
- Have a kit of materials available for reading and select one or two items for perusal by the prospective nominee.

The Follow-Up Conference of the recruiter should cover:

- A brief interpretation of how the board and committees function.
- Why you think the prospective nominee's qualifications will make a contribution to the work of the agency.
- Information about the help that will be available and the kind of training provided.
- An idea of the time the job will take and the people with whom the prospective nominee will be working.
- The election and appointment procedures.

Suggestions for a Nominating Committee Briefing Kit

Items to be included:

- Statement or publication that contains the agency's purpose, program, immediate and long-range goals.
- Fact Sheet on the agency (1 or 2 pages only!).
- Annual or Biennial Report.
- Bulletins or brochures of current interest.
- Official publication(s).
- List of current officers, board of directors, and nominating committee members.
- List of current committees and staff.
- List of positions to be filled with attachment on eligibility requirements.
- Description of positions to be filled.
- Schedule of meetings and special events.
- Relationships with other agencies or organizations in the community (brief statement or report).
- List of questions frequently asked with appropriate references indicated.

The sequence in this case is:

1. Preliminary selection by a group (Nominating Committee) on the basis of information about the prospect's qualifications for an office, frequently demonstrated in other types of volunteer service in the organization;
2. Selection-recruitment interview (one or two face-to-face contacts);
3. Placement on the slate for election to (an) office.

Appointment as Decision-Making Volunteer Member of a Committee or Task Force

Securing of qualified members for a regular or short-term committee—whether for the Program Committee of a Parent Teacher Association, Personnel Committee of a social agency, or Neighborhood Survey Committee for a Community Planning Board—takes place through the combined efforts of the committee or project chairperson—especially the president of the organization, who is often responsible for making or confirming official appointments—and others who refer prospects to these individuals.

A simple *Skill Inventory Chart* (page 96) can be prepared for use by chairmen of such groups to give a systematic overview of the

SKILL INVENTORY CHART FOR A PUBLIC RELATIONS COMMITTEE

Name of Volunteer	Public Speaking	Promotion Writing	Exhibits and Displays	Reporting (Oral)	Dramatic	Radio and TV Interviewer	Presentations	Media	Art	Photography
Mr. A				X	X		(X)	X		
Miss C.		X						(X)		
Mr. W.		X	(X)				X			
Miss N.								(X)		
Miss P.	X				X	X		X		
Mrs. O.				(X)	X	X				
Mrs. H.	(X)					X				
Mr. R.	X					X			X	

jobs to be done and the skills needed by the group members. This chart will assist in quickly determining what jobs or skills are adequately covered or undermanned, and where the gaps are.

How to Develop a Skill Inventory Chart

1. Arrange the chart for the number of volunteers involved in a small group, task force, special project, committee, etc. Include all names and types of jobs or job titles, if available.

2. Across top of chart, write every job indicated, whether routine or complex. In left column, list the names of all volunteers.

3. Place an X under each job or skill that the individual can do or has performed at some time. Put a circle around the ⊗ for the actual job now being carried (as illustrated).
4. Keep chart up-to-date at all times.

Interpreting the Chart

By reading the chart *horizontally,* you see what each individual is doing and what he might be able to do. You also see where jobs and skills may be combined, if necessary.

By reading the chart *vertically,* you can see what coverage there is to each job and where the *gaps* are, both current vacancies and, in the case of emergencies (absences, illness, vacation, etc.), who could double or pinch-hit as needed.

Advantages of a Skill Chart

- Indicator of the number of jobs presently covered.
- Indicator of the number of skills each individual possesses.
- Indicator of how emergency coverage could be planned for.
- Indicator of skills needed by additional members.

The sequence here is:

1. Selection of a prospect with the desired qualifications.
2. Recruitment interview.
3. Appointment (placement).

Assignment as Service or Program Volunteer

Service or program volunteers in hospital settings are members of a corps of uniformed, unpaid, part-time workers who are enrolled through the office of the director of volunteer service. Junior volunteers or "Candy Stripers" are members under 18 years of age.

Such volunteers are assigned by the director of volunteer service to selected hospital departments. They are usually supervised by the personnel in the assigned department, although the director of volunteer service maintains communication with both the volunteers and the department personnel.[6]

The qualifications needed and the service opportunities available should be discussed with the prospect in a face-to-face interview. Particular attention should be given to teen-age volunteers to insure that all legal requirements are met and that the hours of volunteering do not interfere with school and family obligations.

The assignment (selection for, and placement into) a specific area of responsibility should be the result of a careful matching of the

individual's abilities and interests to an activity or task that is congenial and meaningful. Orientation to the institution and on-the-job training should be provided. Experienced volunteers can often assist with this and should be given the opportunity to do so whenever possible.

Beginning Learning Experiences

An informal orientation provides the volunteer with purpose, objectives, current plans, programs and problems of the agency and agency relationships, especially volunteer responsibilities and participation. In addition, individualized learning might include:

1. Specific interests, needs and emphases based on the initial interview, subsequent discussions, specific responsibilities of the job, etc., and formulated with the individual.
2. Plan for *attendance* at programs, conferences, and committee meetings to observe agency activities; *interviews* with leaders on different aspects of the agency's work; *guided reading; assisting* another volunteer with a task or taking on a definite short-term assignment.
3. Scheduling and arranging these activities (including introduction, transportation, hostessing, follow-up, and evaluation).

In the case of a volunteer new to an agency, this exploratory or beginning learning phase is characterized by divergent points of view. Questions may arise on the part of the individual regarding priorities. The agency, through its personnel, may reflect concerns regarding the volunteer's qualifications and contribution. This divergence might be analyzed as on p. 99.

The processes of recruiting, interviewing, and placing of volunteers are not only procedures to fill the personnel and service needs of an agency or institution; they are actually the first crucial phases of a continuous learning program. As the volunteer becomes more and more a part of the agency and its working relationships, he or she will find involvement either meaningful or boring, depending upon the degree and kind of participation.

The agency desires to develop a sense of commitment on the part of the volunteer, and the volunteer seeks responsibility that is rewarding and personally satisfying. The motivations of both are not very far apart in essence, but some agencies and institutions may need to take a long look at what they are presenting as "responsibilities" and what they consider "participation" on the part of volunteers and volunteer service. Otherwise, the gap between the viewpoint of the agency and the viewpoint of the volunteer may never be bridged.

VIEWPOINT OF THE VOLUNTEER	VIEWPOINT OF THE AGENCY
IMPORTANT	
Will what I do make a worthwhile contribution?	Will the new volunteer understand and be committed to the purpose of the agency?
Will I have an opportunity for self-expression?	Will the administrative volunteer be qualified for the position?
Will I be given real responsibility to do a job?	Will the service volunteer be competent and dependable?
Will the experience be stimulating and challenging?	
SOMEWHAT IMPORTANT	
Will I have freedom to operate?	Will the volunteer accept technical direction or professional supervision?
What do I have to know?	Will the volunteer be able to give sufficient time to the job?
What do I have to do?	Will the volunteer learn and follow all rules and procedures?
Will what I do be helpful to others?	
Will I have an opportunity to grow and develop?	
LESS IMPORTANT	
Learning the rules and procedures of the agency.	Understanding of the agency's functions and operations.
Amount of expenses incurred and time involved.	Ability "to get along with others" and to do it "our way."
Forms of recognition and awards.	Follow directions and deliver efficient service.
Understanding of, and commitment to, the long range goals of the agency.	

NOTES

[1]*Cedar Rapids Gazette*, Cedar Rapids, Iowa.
[2]Mayor's Voluntary Action Center, New York, N.Y., 1975.
[3]*Voluntary Action News*, National Center for Voluntary Action, Washington, D.C., January–February, 1975.
[4]Mayor's Voluntary Action Center, New York, N.Y., 1975.
[5]*Essentials for Hospital Volunteer Service, A Guide*, United Hospital Fund, N.Y., 1968.
[6]Ibid.

CHAPTER

5

Continuation of Volunteer Learning in Individual and Group Settings

> Board leaders and [other] volunteers are not born—they are roles we learn. —EVA SCHINDLER-RAINMAN*

Helping a volunteer to get started effectively begins immediately after placement; a job description can be a useful tool during the induction process. As stated earlier, a volunteer job description should be available at the time of recruitment so that the volunteer can discuss in detail various aspects of the job and decide what he or she wants to do. Sometimes this is not possible, but the form itself should usually be completed in time for induction training. Often the volunteer does not have enough knowledge of the job to ask realistic questions, so the job description helps to focus some of the questions for him. Or he or she may have heard others commenting on the tasks to be performed, or a distortion of its requirements, and may need clarification with a qualified person. Looking at the volunteer job, not as one or more tasks to do but as a role to learn, gives dignity to the assignment and points also to the fact that there are other players in other roles whose cooperative efforts are needed for an effective "performance" of the project or program.

* "Volunteers are Everywhere," National Conference on Social Welfare, Atlantic City, N.J., 1965.

The job description form illustrated on page 102 may need some adaptation, depending upon the particular needs of a group or organization, but the essential elements of purpose, area of responsibility, to whom responsible, and qualifications required, should not be omitted. Before discussing the training uses of a job description, the following guidelines may be helpful in producing a description that is both simple and practical.

DEVELOPMENT OF VOLUNTEER JOB DESCRIPTIONS

Title of Service, Committee, or Special Project

In large organizations, information about the geographic or physical size of the area to be served, or the bureau giving the service, needs to be noted under this category. (If the title of "special project" is used, such as a membership or fund drive, camp visitor program, or a rummage sale, this category might be applicable to any sized group or agency.)

Position

A specific job title should always be indicated, whether it be a chairperson of an important board committee or a relatively minor assignment, such as telephone or clerical aide. (A title lends dignity to a task, however small.)

Purpose of the Job

This should be a brief, concise statement in one sentence, if possible. Examples are: "to give leadership to a special study committee on_____"; or "to act as one of four chaperones at a teen-age dance"; or "to serve one or more weekly two-hour shifts in the hospital reception area."

Areas of Responsibility

Listed here should be the specific parts of the job and definite examples of activities, such as:

Chairperson of_____Committee: involves presiding at committee meetings, responsible for, or sharing in, the selection and orientation of committee members, agenda planning, working with the secretary on the minutes and reports, checking with committee members on assignments delegated to them, reporting to the board or other appointive authority, and the like;

or,

NAME OF ORGANIZATION: _____

VOLUNTEER JOB DESCRIPTION

Title of Service,
Committee, or Project _____ Position _____
Purpose of the Job:

Areas of Responsibility: *Typical Tasks:*

Appointed or Elected by:

Term of Office:

Responsible to:

Qualifications (experience, special abilities, etc.):

Training Requirements:

Time Needed (meetings and other):

Comments:

Completed by:

_____

Date _____

Committee Member: attending meetings, plus a description of the way the member is to make a specific contribution to the work of the group;

or,

Program or Service Volunteer: working as a reception aide, plus some specific type of assignment, such as getting out a mass mailing, so that the volunteer has an opportunity to work with others in a team relationship. (This might provide some form of job rotation as well.)

A program aide or group advisor needs to be reminded of the unglamorous aspects of the job by having a description that explains the necessity for record keeping, care of equipment, making an annual inventory, collecting parent permission slips, and the like.

Appointed or Elected By

The complete procedure pertaining to nomination as well as election, to recruitment as well as placement and appointment, should be included under this category.

Term of Office

A specific period of time for the term of office needs to be included here as well as possible extensions such as re-election or reappointment for another period of time. Terminal dates should always be stated.

Responsible To

This category should state the person who appoints the job holder and the person to whom the job holder is responsible. It may or may not be the same person; however, the distinction should be made clear. For example, a chairperson may be responsible to the board of directors through the president; or a program service volunteer may be appointed by a committee chairperson but be responsible to an individual heading up a specific project or task force.

Qualifications

If ability to speak Spanish fluently is required, that should be stated here; or if age, sex, education, etc. are factors affecting the job, such information should be indicated. The words "none" or

"no special qualifications required" should never be written because every job, even a relatively unskilled one, needs to be dignified by some statement such as: "belief in the purpose of the movement," or "interest in office routines," "accuracy," "patience," or even "good eyesight to read small print on a form."

Training Requirements

If basic training or specialized skill courses are necessary for the job, this fact should be noted under this category, plus a realistic appraisal of the time required. If neither group nor individual training are required, a statement such as: "on the job orientation," or "there will be a briefing session as part of the regular committee meeting," or "reading of background material is expected and consultation with _____ is available," will suffice.

Time Needed

An honest estimate of the time required for the job should be indicated here, listing not only regular meetings of a committee, but anticipated special meetings, individual conferences, study, telephoning, correspondence, and representation at community or national meetings.

In the case of service volunteers, the often used descriptive phrase "on call" is too general. A realistic time span and length of work periods should be indicated as far as possible.

Comments

Under this category might be included statements about special events, future developments, or comments by incumbents about specific aspects of the work. Travel, evening hours, weekend duty, out-of-pocket expenses, wearing of a special type of apparel or uniform, and the like, might be described here, if not covered elsewhere.

Other

The job description should always contain the name and position of the person describing the job and the date of the original completion as well as subsequent revision.

A job description needs *periodic revision* in order to serve a meaningful purpose in recruitment, placement, training, and evaluation of volunteer service in any type of agency, group, or organization.

JOB DESCRIPTION[1]

TITLE: *Committee Member in Y.W.C.A.*

CLASSIFICATION: Volunteer

SUMMARY: Participates in planning, study, and policy recommendations and decisions delegated to committee. Accepts individual assignments. Accountable to committee chairman.

TYPICAL RESPONSIBILITIES:

Attends regularly scheduled meetings of committee;
participates in discussion of program planning (long and short term goals) and policy;
studies materials related to committee function and department which is provided by staff and chairman;
participates in at least one segment of work of the committee;*
participates in All-Association meetings and events as much as possible.
Shares in finding solutions to problems;
shares in evaluation of program.
Interprets work of department and committee in other relationships in the YWCA;
interprets work of YWCA to group and personal contacts in the wider community for purposes of better understanding and recruitment of volunteers and staff.

QUALIFICATIONS:

Is a member of YWCA;
has particular or potential interest in work of committee;*
desires to make contribution at policy level;
has an active and searching interest in concerns of women and girls in our community.
Desires to learn if she has no previous experience in specific area of committee's charge.

TRAINING: Attends All-Association volunteer training sessions;
may attend special institutes in community or elsewhere concerning special area of committee function;

may attend special conferences with chairman or staff member assigned when this seems desirable.

Date:

A job description also needs individualization. A new volunteer may be overwhelmed by too extensive a listing of the tasks involved; they should be listed in some order of priority focusing on those with which the volunteer is already familiar. The two starred items on the job description on pages 108–110 of a committee member indicate how a volunteer can gain confidence; in addition to attending meetings, there is opportunity for a specific contribution in line with her specific interest and/or ability.

An example of a very complete job description written in narrative style but containing all necessary items and focusing entirely on the volunteer "role" rather than specific tasks, follows.

THE ROLE OF THE VOLUNTEER COUNSELOR[2]

The role of the volunteer counselor is the very heart of the Rape Crisis Service. The volunteer counselor staffs the office, answers calls and provides crisis counseling to the rape victim and her family. She/he may also on occasion provide transportation for a rape victim, accompany her to or meet her at the hospital or police station, become involved in legal procedures in a rape case, and make referrals to the community agencies for further counseling or referral. Thus, the volunteer counselor must be seriously committed to participating in this service, and willing to give of herself/himself in order to assist the rape victim.

These words, "Help the Victim," indicate the primary goal for each Rape Crisis victim counselor. Each action which she/he pursues with a rape victim should be weighed in the light of this objective.

Perhaps you are asking at this time just what it means to be a "counselor." Basically, a counselor is a person who enters into a helping relationship with another person in order to help her/him deal with some problem or stressful situation. The main tool of a counselor is her/his ability to *listen*, not just to the words spoken by the other person, but also to the feelings which are conveyed. This is particularly important when counseling a rape victim where many emotions such as fear, anger, guilt, or anxiety may be involved, but difficult for the victim to verbalize.

Another important part of the role of a counselor is to build a *relationship* with the other person. She/he must make it known by her/his comments and reflections that she/he truly cares about the problems that

the other person is facing, and that the counselor is a person who can be trusted. When counseling a rape victim, this feeling of trust is crucial, and must often be developed over the phone or in a very short period of time.

One aspect which is *not* a part of a counselor's role is that of advice giving. While she/he may be asked to provide information and should do so, the counselor is never in a position to decide what is best for another person to do. This factor holds true for a Rape Crisis volunteer counselor as well. She/he should be prepared to answer questions for the victim about hospital procedures, reporting the rape to the police, legal procedures, etc., but the volunteer should never advise the rape victim to follow one course of action or another. The counselor is there to help the victim in whatever she decides to do. If you, as a counselor, find yourself saying things like, "I think you should. . . , My advice is. . . ," perhaps it is best to check to see if you are really meeting the goal, to "Help the Victim."

The crime of rape is a traumatic experience, and we all have certain feelings about it. As counselors, it is very important to be aware of these feelings so that we do not let them affect the way in which we respond to the victim. For example, if the counselor has strong feelings that all rapes must be reported to the police, she/he may find herself/himself pushing the victim to report the crime against her will. The counseling relationship at this point is not particularly effective. Each of us also carries prejudices regarding race, moral character, social class, etc. As an example, we may have very different feelings about a rape involving the daughter of a prominent citizen as compared to the rape of a woman with a questionable reputation. While we may be a little ashamed of these feelings, it is important to recognize that we have them, in order that such prejudices will not become a hindrance in our job of helping the victim. Regardless of how the volunteer feels about a particular situation, each rape victim must be assisted to the maximum!

Confidentiality is another vital principle in serving as a volunteer counselor. Rape is a very volatile subject, and the victim is placing a great deal of trust in the counselor by sharing her inner feelings and relying on her/him for emotional support. The counselor *must not violate this trust!* Factual information relating to a specific victim should be shared only with the Rape Crisis Service Coordinator and the other volunteer on duty. Such information can be reported to the next set of volunteers in case further assistance is needed, but should *never* go further. We realize that the natural human tendency when a person has been involved in a crisis situation is to want to share feelings. Opportunities are there for the counselor to ventilate her/his feelings with her/his co-volunteer

and the Service Coordinator. Discussing rape situations with friends, families or colleagues at work, even if no name is mentioned, *is a violation of the victim's confidentiality.*

Hopefully, you are now aware of the vital role which you will assume as a volunteer counselor. It will involve a serious commitment in terms of your time, energy and emotions. We encourage each trainee to seriously consider if she/he is willing to invest herself/himself in this service, since a volunteer who is not committed will be of little help to the victim.

Training Uses of a Volunteer Job Description

If a copy of the job description has been given to the volunteer before induction, then questions or points of clarification can be discussed or amplified as needed at the time of induction to the job. If the form is in the process of being completed during the induction itself, a question and answer session might supply information and instruction simultaneously. Generally speaking, it is better to give the volunteer an opportunity to study the job description in advance whenever possible.

Title of Service, Committee, or Project	This category lends itself to an explanation of the relationship of the service to other parts of the agency or organization, the place of the particular service in the community, and an analysis of the background data affecting needs and interests of the people participating in the service.
Purpose of the Job and Areas of Responsibility	These two categories should provide a full picture of the importance and relationship of the job to the organization as a whole. The listing of the tasks to be done should be discussed with the new recruit and an opportunity for questions about procedures and methods encouraged. The volunteer may have queries about policy and goals of the organization and these should be answered in general terms at this

stage. An orientation session can offer more direct exploration of such matters. However, the questions raised may indicate a need for special information or demonstration sessions.

Appointed or Elected by and Term of Office

Both of these categories can give the supervisor or chairman an opportunity to review various types of selection and election procedures. Information on how the volunteer may participate more fully in the work of agency or group would be useful as well.

Responsible To

A clear explanation of the lines of responsibility and accountability should be provided here. Use of an organization chart might be helpful, if the organization is a large, complex one. In a smaller agency, people and groups can be indicated by informal illustrations on a chalk board or newsprint pad. Care should be taken at this stage, however, *not* to overwhelm the new recruit with a multiplicity of lines, boxes, and procedures.

Qualifications

In discussing this category with the volunteer, an attempt should be made to discover any particular strengths or weaknesses so that the training offered later will be realistic and practical.

Training Requirements

This category is closely related to the one above and should lead directly to the training required for the job and the reasons for it. Stress should be made on the

help available at every stage and the accessibility of people and facilities to support the volunteer job holder.

Time Needed

As far as possible, an honest appraisal of time involved should be discussed under this category. The volunteer should have been made aware at the recruitment interview how much time might be required. But until actually on the job, the time factor may not have any reality for him. He may need help in resolving any conflicts arising from the job schedule and personal commitments. The supervisor or chairperson should use this opportunity to review the planning cycle and calendar of activities of the organization and interpret the timetable of the job in relation to these. The volunteer also may need assistance in assigning priorities to certain aspects of the job and in learning how to use time more effectively.

Comments

Under this category some of the special activities related to the job can be described, or any changes that may occur, as well as the need for periodic review of the job itself. The volunteer at this stage should begin to see himself as contributing to the periodic review and to becoming a more active participant in the work of the group or organization.

Examples of Training for Program or Service Volunteer

The following three-session training event (entitled "get-together" for program volunteers rather than "training") includes a mixture of knowing and doing and a variety of methods in presentation.

THREE THURSDAY MORNING GET-TOGETHERS

FOR

NEW FRIENDLY VISITORS

September 16, 19_____ 9:30 A.M.

Registration, Coffee, Danish—let's get acquainted!

Greetings, and a few words about Volunteering—
Chairperson of Volunteer Bureau

Film: YOU ARE MY FRIEND

Discussion: Are we afraid of the unknown friend? Or are we afraid to get too deeply involved? Possible pitfalls in Friendly Visiting.

* * * * *

September 23rd, 19____ 9:30 A.M.

Greetings and coffee—(of course!)

DON'T .....let your homebound friend
JUST SIT THERE .....let her
DO SOMETHING!

Reading is a creative activity!

About the services of the Library, particularly services to the homebound and elderly. —Director, Public Library

Let's Use Our Hands! Maybe someone is interested to see what we can make. —A representative of Craftsman Unlimited, Inc.

* * * * *

September 30th, 19____ 9:30 A.M.

Coffee and Greetings once more	
Abilities and Disabilities of the Homebound Elderly.	—Public Health Nurse
How to Accentuate the Positive.	Mental Health Consultant
	County Department of Health
Final Discussion	

A more structured approach is used in training volunteers for a telephone counseling and crisis intervention center dealing with family and marital problems, pregnancy, birth control, suicide, drugs, venereal disease. Volunteer training consists of a two-month, fifty-hour period when individuals explore the areas of knowledge and practice the skills necessary to become a volunteer counselor. These volunteers are well diversified in age and background, ages ranging from 20 to 50, including students, homemakers, businessmen, professional counselors, teachers, nurses, and others. The core of the training program is role playing, mostly reflecting actual cases received at the center.

EXAMPLES

Drugs

You are 18 years old. You've been tripping all day and lost track of time. You're feeling dizzy and the whole room looks like a kaleidoscope. You ask "What should I do?"

Family or Interpersonal Relationships

You are a woman, early 30s—"I'm wondering if I should tell my husband's parents about my marital problems? He rants and raves over every little thing I do and don't do. The slightest thing makes him angry. I think some of his feelings come from the way he was raised and his parents should know about it."

Suicide

You are a woman, mid-twenties, barely able to talk. Your husband walked out on you. You have taken some Placydel, you think

5 or 500 mg. You have decided to leave a message for your husband; dying is the only answer.

Abortion

Your husband has left you with four children. There's really no hope of getting back together; you have tried counseling and trial separation, but nothing has worked. You've found out you're going to have a baby and are terrified. You don't want the responsibility of raising another child.

These represent situations given to the trainee playing the role of "client." The trainee-counselor responds. A tele-trainer—two telephones hooked to an amplifier—is used. In this way the trainee group listens to the role play and critiques it afterwards.[4]

The following two examples concern training for *decision-making volunteers.*

Group Training for Delegates

Almost all organized groups have delegates of one kind or another. What does being a delegate in an organization mean? What are the responsibilities of an individual delegate? How can all organizations train their respective delegates for effective participation in decision-making meetings? A delegate is defined by one parliamentarian as "a member sent to represent an organized group and empowered to act for it."

In order to plan the training for a group of delegates, it is necessary first to ask: What does a delegate have *to do?* Listing the duties would indicate tasks such as:

- *attending* regularly scheduled meetings of an organization as defined in the bylaws and participating in the proceedings;
- *becoming informed* on the needs and points of view of the particular group represented by the delegate;
- *voting* "in meeting assembled" and in the best interests of the organization as a whole;
- *reporting back* to the particular group represented by the delegate on the decisions reached and the reasons therefor.

The next question to be asked is: What does the delegate have *to know?* A survey of the duties above indicates that a thorough knowledge of the organization, its constitution and bylaws, and a complete background on the issues to be discussed and voted upon, make up the vital content to help delegates carry out their respective responsibilities.

Plan for Group Training of Delegates

Purpose: To develop an understanding of the important and challenging role of a delegate in an organization; to provide information of the specific responsibilities of a delegate; and to prepare the delegate for effective participation in meetings.

Advance Preparation (INDIVIDUAL)

For reading and review by the delegate:

- Copy of the duties, qualifications and term of office for delegates.
- Copy of "Workbook" or Meeting Manual, if available.
- Constitution and bylaws of the organization.

Information Session (GROUP)

Review of general duties of a delegate and use of resource materials. Use newsprint chart, chalkboard, or overhead transparencies to present the following:

DUTIES OF A DELEGATE
Before the Meeting
Preparation
At the Meeting
Participation
After the Meeting
Communication

Review the above three points with group filling in more details, such as typical agenda items, issues for decision, and examples of direction-setting or reaction-getting in a meeting.
Have "hand-out" material relevant to this content available for distribution at the end of the session.

What the Delegate Does Before the Meeting:

- *Becomes thoroughly informed about the needs and interests of the group represented.*

Cite examples of needs expressed or points of view that individuals or groups might have in relation to organizational issues, plans, projects.

Focus discussion on:

WHY does a delegate need to know the needs and interests of the individuals represented?

HOW can such information be obtained?

Should this be a "before the meeting" task or a year-round responsibility of every delegate?

- *Review and study agenda for the meeting and all attachments:*

If there is a Delegate's Workbook or Manual available, review the agenda of the meeting in the light of the advance material prepared for study, pointing out additional sources of information, need for noting questions to be asked, and marking workbook pages for reference and follow-up.

Describe (for the benefit of new delegates):

HOW the meeting will be conducted.

WHO will preside and what the rules of debate are to be.

Explain difference between an informal discussion and a meeting where the business of the organization is to be conducted.

- *Have pertinent facts at hand:*

Explain need for delegate to have information or facts ready for discussion or interpretation. Stress need for brevity and clarity in the content and presentation.

Discuss why all pertinent facts on an issue should be heard before a decision is made; why this is every delegate's responsibility; and why a delegate has an obligation *to listen* to other points of view before coming to a final decision.

- *Know slate of nominees:*

If a delegate's workbook with biographies and photographs of the nominees is not available, explain the necessity for delegates to find out about and to learn the qualifications and abilities of as many of the nominees as possible.

Discuss how this might be done: by study of qualifications (requesting same if not made available in advance of the meeting); by observing nominees in action; by asking other individuals who may know them; by meeting the nominees and interviewing them in person.

- *Practice skills of participation:*

Information, explanation, and drill will be required on the following:

Knowing and understanding parliamentary procedure
—why it is the basis for democratic participation in a large organization; the terminology involved; necessity for rules of debate.

What are the rights and privileges of an individual delegate? The rationale of majority vote and dissenting opinion; and for being *informed* but not *instructed.*

At the Meeting:

Participate (fully):
- Listen carefully
- Weigh judiciously
- Decide prudently

Vote (intelligently):
- On basis of intelligent analysis and weighing of issues.
- In the best interests of the _____ (name of organization, club, etc.) as a whole

Act (wisely):
- Report actions taken and follow-up to be done.

After the Meeting:

Report on:
- Official actions and reasons therefor (full discussion and vote taken).
- Elected slate of officers and board members.
- Information and/or issues presented at the meeting (for discussion or new information).
- Evaluation
  —ideas, issues, suggestions for future meetings and follow-up.

Discussion:
(GROUP)

POINTS FOR DISCUSSION

What does "in meeting assembled" mean? How does an individual participate effectively in what is essentially a collective enterprise?

Why is it important for a delegate to come to a meeting informed but not instructed?

How does an individual exercise self-discipline in order to insure the true spirit of a democratic meeting?

Why is it important for a delegate to have facts at hand? How can these facts be expressed in floor discussion or debate?

What responsibility does an individual have to make known diverse or divergent points of view?

If not in agreement with a decision made by a majority vote, what is the delegate's responsibility after the meeting?

Practicing Skills:
(INDIVIDUAL AND GROUPS)

In order to have all issues discussed in a free and open manner, to learn to listen and weigh facts, and to act on individual conviction and in the best interests of an organization, opportunity should be provided in the preparation, briefing, or training of delegates for practice in the following skills:

- Parliamentary procedure and debate

- Reporting accurately and clearly
- Marshalling facts and figures to support a point
- Speaking from the floor (and at a microphone)
- Listening to differing points of view
- Modifying or adapting ideas and suggestions made by other delegates
- Analyzing the "pros and cons" of an argument

Various methods such as role playing, dramatic skits, and practice demonstrations can be utilized for this type of training.

Summary: (GROUP)

Some provision for an inspirational conclusion should be made. The showing of a film about the organization's work, a "prestige" person in the organization as a speaker or a combination of the two will create a spirit of challenge and cooperative effort so essential to the democratic system.

Group Training of Planning Committees for Meetings

Meetings are an integral part of organized group activity. Too many meetings are ill-planned, dull, or nonproductive. Some may be inspiring to members or to volunteers who participate in them, but far too many are haphazard in approach and routine in method and program. Some form of training should be offered to the members who comprise agenda committees, conference planning committees, or for planning committees for various types of group or organizational meetings. Usually a one-day training period with two sessions, morning and afternoon, or an afternoon and evening is adequate, although while some groups may find

that a half-day session is enough, others may require several days.

The sample outline offered here might be used for the training of the planning group assigned to plan a club or agency's annual meeting.

OUTLINE FOR THE TRAINING

Purpose: To prepare those responsible for the planning of annual meetings, conferences, etc., for (1) effectively carrying out the assignment, and (2) for insuring the end result of a successful annual meeting of the organization.

Methods

Small group discussion of the individual's personal reactions to meetings attended.

Points for discussion:

- How many meetings attended were significant?
- How many accomplished a purpose?
- How many were really productive in the sense of forwarding the purpose of the club or organization?
- How many provided a satisfactory experience to the participant? Why?

List points—good and bad—as identified. (Use chalkboard or newsprint pad.)

Identify and explain the principles and practices involved in effective meetings, drawing upon the chalkboard list and giving practical examples.

Focus session on the following:

- Why a meeting should have a *clearly defined purpose* and an *attainable* goal.
- Why a meeting needs to be *carefully planned and timed.*
- Why *the participants* should be well-informed and have *advance* material for study and review.
- Why the *time and place* of the meeting should be the best available for the purpose.

Group Review

Various participants assigned individually or in pairs report to the group on how a planning committee might approach the task of planning for an annual meeting.

Group identifies duties and responsibilities of each member of a planning committee.

PROGRAM PLANNING SKILLS FOR MEETINGS

Practice Assignment Distribute prepared Work Sheets for participants to use in working on a hypothetical or actual meeting presentation. (Allow time for preparation.)

WORK SHEET
(page 1)

Who is Your Audience?

What is Your Message?

What Do You Want the Audience to Know or Do?

Anticipated Questions or Issues That May Arise:

WORK SHEET
(page 2)

List points or agenda items in the order to be made including examples. Keep your listener's viewpoints in mind.

List audio-visual materials or other methods to be used to get the message across.

Group Discussion and Summary

Individuals or pairs report on assignment. Allow time for questions and discussion by entire group.

Summarize with following questions on chalkboard or newsprint pad, giving examples of "how to" or practical suggestions:

- Have sight and sound been used to communicate a message? How?
- Did each member in the audience become a resource to the meeting by:
  — participating
  — reacting

— discussing
— voting

- Was an action commitment to the decision or a solution "built in" in the program or agenda? How?
- Has post-meeting follow-up been realistically planned and assigned? How?
- Will the meeting be evaluated for future planning? How?

Teaching Low-Income and Culturally Disadvantaged Adults

There is an increasing need today for literacy volunteers to teach the adult illiterate and the culturally disadvantaged. But to discover the training needs of those with a low level of literacy and with little sophistication in group situations requires a high degree of insight and sensitivity on the part of those who would carry the role of volunteer literacy teacher. VISTA volunteers working in lower-income neighborhoods have learned that asking a group of work-weary or unemployed individuals what their "interests and needs" are does not work out very successfully. "Interests" and "needs" mean different things to a family in crisis, and indirect methods must be used to gain the necessary information on which to plan group training.

The author of *Literacy Instructor's Handbook*[5] offers a number of practical suggestions for those working in this field. For almost every subject taught in the volunteer program, it is recommended that a large group be formed despite language barriers and achievement difference. Developing a sense of belonging is important here, and when accomplished the group can be divided into smaller units. Each session should have something that will reach each participant, new material for some and a review for others. There should be an opportunity for each participant to lead the group at some time in order to gain self-confidence. Praise and encouragement are a vital stimulus for these adults who have experienced so much failure in life.

These suggestions have substance for any staff or volunteer instructor working with the disadvantaged. Patience and sincerity are a must as in an awareness that the individual whether from Appalachia or a lower-income ethnic enclave is "different" but not "inferior." The use of simple words and short sentences is recommended as is the writing of new words or terms on a blackboard or newsprint pad. The jargon of bureaucracy and institutional

procedures often need clear explanations. If such terminology is needed for certain types of assignments, it is useful to encourage the participants to respond to the instructor or trainer by using some of the new words and thus involving them in their own learning.

CONSUMER EDUCATION FOR LOW-INCOME ADULTS[6]

Teaching the disadvantaged adult consumer buying and money management is a much needed service today and volunteers who can do this successfully will find great satisfaction in the task. A project entitled HEVE, Home Economist Volunteers for Education, University of Illinois, successfully demonstrated how such training might be accomplished. Before the actual content of the training was developed, however, the needs of the disadvantaged had to be covered in various ways. Home visits and informal conversations with individuals in a neighborhood were tried first. Occasionally a mother would respond by filling out a simple check-sheet or a group of housewives would answer questions put to them by the volunteer "teacher." In another instance, the volunteers got several women involved in sewing or knitting and listened as they discussed the various things that happened to them, to their children, or to a neighbor. A great deal of information can be gained in this manner because, as a method of planning training, it reveals where the learner actually *is*, and not where the volunteer trainer or teacher thinks he is!

One lesson plan, for instance, was focused on the exchange of food stamps. A dramatic skit on the topic of "How Much Will Our Allotment Buy?" was presented by two trainers representing housewives. The scene then depicts a housewife, her arms laden down with a large bag of groceries, knocking on the door of a neighbor. The neighbor upon opening the door reveals two large bags of groceries on her kitchen table. The first woman compares her purchases with those of her neighbor who appears to have bought much less expensive items and more of them. The two women then discuss the items, one by one, explaining family tastes and cooking plans. Each one analyzes the amounts paid and estimates how long the groceries will last in feeding their families. The skit can provide entertainment while endeavoring to teach the nutritional aspects of food for growing children and wise buying habits. Real food or empty cartons can lend reality to the skit and the conversation between the women often evokes comments from the onlookers who identify with the housewives.

After the performance, the audience will undoubtedly become involved in asking questions and sharing experiences about how to satisfy hungry families with a limited budget and what to do about kids who want a supply of junk foods for snacks. Housewives of different ethnic backgrounds may ask about "soul food" or kosher menus. During the discussion the volunteer "teacher" can get in various pointers on how foods of differing prices may have the same nutritional values, how to pick out a bag of carrots or tomatoes to be sure they are of good size and ripeness, and when to use the "two-for-one" coupons.

If time allows, each participant might be asked to prepare a list for the next trip to the supermarket and explain "the why" of each item. Various items can then be put on the blackboard for further discussion or a resource person from the community, such as a social worker, school dietician, public health nurse, consumer affairs director, might be invited to offer comments and discuss available sources of assistance that the participants may not be aware of, or know how to utilize.

In the protective atmosphere of the training session, the housewives should feel free to ask questions and to make comments as they listen to the professional from the community being probed for information by the volunteer "teacher." This in itself becomes a form of learning for the disadvantaged adults and a fringe benefit gained by the training. Sensitive and aware volunteers working with the other volunteers can often make these exciting discoveries as they learn from each other.

Learning Experiences for Student Volunteers

Volunteer programs for high school and college students combine knowing and doing in different ways; often the "knowing" is linked to a particular activity which the student has studied in regular classes and the service provides opportunity for practice and/or career exploration through work study and internship programs. For example, ". . . a student . . . has put his musical talents to use as a volunteer. Wayne, who plays trumpet, saxaphone, and piano, is now giving saxaphone lessons at (a community center). He finds that teaching has enhanced his own skills and knowledge of the instrument. . . ."[7] In another high school, "the students volunteer one day each week in agencies and jobs that are related to their post-high school plans."[8]

It is possible that such experience will give the students a continuing interest in and commitment to volunteering and citizen participation regardless of whether pre-service briefing, supervi-

sion on the job, or final evaluation include some reference to the idea of volunteering per se. Colleges and universities also feature part-time internships in connection with various courses, especially in political science and human services, again with emphasis on the subject matter of the academic program. However, there are an increasing number of institutions of higher learning which offer specific courses on volunteering, often as a month-long interim program or a summer session. In such programs pre-service class sessions include discussions on the role of a volunteer in various nonprofit work settings, volunteer-staff relations, history, philosophy, and trends in voluntary action in the United States and other countries, in addition to briefing for the specific agency and client system which each student had selected to serve. The objectives of one such course,[9] for example, stated:

to help students gain:

- appreciation of volunteering and citizen participation as a privilege and responsibility;
- understanding of the function and operation of a public or voluntary community service;
- practice as a volunteer with educational guidance by an officer or staff member engaged in a nonprofit making enterprise;
- personal encounter with people of different life-styles.

Each student was to turn in a brief but complete daily log of activities and a final summary report covering the following:

- brief description of highlights from the month's service;
- reviews of at least two books on volunteering;
- an essay on what was learned about the work of the agency and about being a volunteer.

In addition, a final course session gave each student an opportunity to hear about the volunteer experience of the other students in a great variety of local, state and out-of-state agencies, from preschool day care to council on aging, shelter workshop for the handicapped, correctional institutions, an Indian reservation, also the local Voluntary Action Center when VAC pins were presented to all student volunteers by the coordinator of the college volunteer service—herself a student volunteer.

Education for Citizen Action

So far in this book, the term "decision-making volunteer" has referred to leaders in voluntary associations or governmental commissions established for some specific societal goal in the human services area; it has been emphasized that these decision makers

were both initiators of, and participants in, voluntary action and service.

Other community groups exist for action purposes only. From Common Cause to small city consumer groups, from Nader task forces to local professionals working pro bono publico, from housewives angry at children's television to retired people angry at unbridled industrial growth and environmental pollution, volunteers, primarily middle class in background and outlook, are banding together in all sorts of public-interest movements. "A seemingly inexhaustible supply of middle-class people (are) eager to get involved in this or that cause . . . issue—rather than service oriented."[10] They use mailings and group meetings to inform each other on the issue and to plan press releases and various lobbying techniques to influence the votes of legislators from local officials to federal legislators. Many if not most of the members of such groups have an above-average educational background and consider specific training programs unnecessary.

Other organizations, in contrast, feel "that all citizens regardless of race, creed, or income bracket need equipment to take hold of the political process." The Citizens Information Service (CIS) of metropolitan Chicago, set up in cooperation with the Illinois League of Women Voters, started as a bilingual telephone inquiry service staffed by volunteers—"Chicago's poor communities have as many Latinos as do coastal border cities. . . . Publications . . . offer factual unbiased information in simplified language on city problems and government—and how the citizen fits into the total picture . . . most also translated into Spanish. . . . Some are just sheets, partly in type and partly hand-printed. Others are sizable documents and are used in CIS Workshops and classes, for example the four-session political education course, the 12-session course for neighborhood organizers, all set up at a time and place chosen by the participants." People came from a variety of backgrounds. We may start out on the mechanics of running a meeting and may end up by talking about automobiles, biology or poetry—you have to do your homework to run those classes! Teachers are professionals, paraprofessionals, and often graduates of CIS classes. In most cases graduates became resource persons in their communities. . . . The heads of CIS pride themselves with furnishing the average citizen a "third ear to community action. . . . A lot of federally funded programs have not really considered the citizen participant. He or she doesn't get the necessary skills in an independent way that the person can trust. . . . There are no require-

ments to be a member of a leadership class. It's not a question of money or education. Anybody who is interested in the things we offer can join. . . . We have been giving a course jointly with Malcolm X College on Saturdays here, concentrating on writing skills—how to take notes, agendas, etc. But the biggest thing . . . is the Community Education on Law and Justice project . . . funded 90% by Illinois Law Enforcement Agency . . . to develop a program so that communities can conduct self-studies on law and justice. . . . In Chicago there (were) four classes—two in black communities, two in Latin communities—and six classes outside Chicago."[11]

Another community education program is entitled "Adult Armchair Education" described as a combination of adult education, referral to health, social and manpower services, counseling, and community involvement and betterment program for a disadvantaged, predominantly black target population. "Inner-city disadvantaged persons are grouped into small discussion units. The basic objective is to motivate the individual participants to engage in self help for whatever problem appears to them as most pressing . . . the basic unit is the city block. . . . Because the target population is inherently reluctant to participate in organized activity, a basic tactic of the program is to provide a place for the group to meet that is convenient, informal, and familiar. The best place, it has been found, is a home within a block. . . . The groups meet once a week for ten weeks . . . usually from seven to ten P.M. . . . For the group meetings AAE has established a fairly structured curriculum; minority history, consumer education, and communication skills, which include reading, writing and arithmetic. . . . During both recruitment and the group sessions those contacted by the program are encouraged to describe problems for which they would like help. . . . If the request indicates the need for discussion and advice one of the staff counselors is assigned to provide it, in most cases by referral to some already available service facility. . . . Medical, optical, dental, child care, legal, personal and family problems are referred to community resources that offer appropriate help. . . . In addition the group sessions stress the importance of community activity as a way of improving local conditions . . . an effort is made to broaden the participants' concept of community and to initiate the idea of activity that can continue after the ten weeks of AAE sessions are concluded."[12]

All the training programs described here utilize a variety of training methods and techniques which will be explored more fully in the following chapter.

NOTES

[1]YWCA Cedar Rapids and Linn County, Iowa.

[2]Contributed by Martha Ward, Training Coordinator, Cedar Rapids, Rape Crisis Service.

[3]Contributed by Ilse Berk, former director of Northern Westchester Senior Assembly, Mt. Kisco, N.Y.

[4]Contributed by Jean K. Young, former Director, Foundation II, Cedar Rapids, Iowa.

[5]Mary C. Wallace, *Literacy Instructor's Handbook* (Chicago, Illinois: Follett Publishing Company, 1967).

[6]Adapted from *Consumer Education for Disadvantaged Adults,* "A Guide for Teachers," in Illinois Teacher of Home Economics, Vol. XI, No. 1, Fall 1968, Urbana, Illinois.

[7]*This is HSVP,* published by the High School Volunteer Program, Mayor's Voluntary Action Center, New York City, December 1974, p. 3.

[8]Ibid., p. 2.

[9]"Volunteers for a Better Community," January 1975. Interim at Mount Mercy College, Cedar Rapids, Iowa.

[10]Roger M. Williams, "The Rise of Middle Class Activism: Fighting City Hall," in *Saturday Review,* March 8, 1975, p. 12.

[11]Excerpted, by permission, from "The Citizens are Taking Over," *The National Voter,* Vol. XXIV, No. 4, Winter 1975, League of Women Voters of the USA, pp. 12–16.

[12]Summarized by permission from "Adult Armchair Education," in Julian L. Greifer (ed.), *Community Action for Social Change* (New York: Praeger Publishers Inc., 1974), Chapter 10.

CHAPTER

6

Participation methods for volunteer learning

> Deciding which methods and techniques to use in achieving a specific educational objective is one of the important tasks of the adult educator. . . . There is no one best method or technique. —L.L. PESSON*

The understanding of interpersonal relations and skill in decision making are required in every field of endeavor today. The successful and constructive handling of controversy, so much needed by decision-making groups, implies that the participants in such groups possess the skill of accurate analysis and the ability to solve problems.

Board and committee members are particularly vulnerable in these areas. Attitude and human relations training necessitates methods and techniques that involve the participant in his or her own learning. This cannot be accomplished by note-taking, reading lists, study of manuals and procedural reviews, however well done.

Also the "newer" groups of volunteers: youth, disadvantaged, the elderly, ethnic minorities—are not receptive to the more formal types of training or to academic methods. A flexible and relaxed approach is more effective with these groups than the format of the traditional classroom lecture. The teaching of knowledge, skills, values, and attitudes needed in assuming most types

* Professor and Head of the Department of Extension Education, Louisiana University, *Priorities in Adult Education* (New York: The Macmillan Company, 1972).

of volunteer responsibilities can best be learned from a living situation, from reality itself, and, as such, it can stretch the imagination and sharpen the mental ability of the participant. This type of approach is often useful in helping volunteers and staff to work together, and, in some measure, may serve to bridge the communication gap between these two groups.

Experience has shown that there is a real need for active participation by the volunteer trainee to plan his or her own learning goals. Group learning experience can be shared if the trainer or leader provides opportunities for trainees with similar interests and experiences to exchange ideas and to learn together.

Participation in action, learning by doing, testing, practicing in reality situations or vicarious experiences, are ways in which this can be done. The academic approach of lecture, presentation, "talking about" desirable practices—is not sufficient for the impatient young volunteer, or for the less educated with poor reading and writing skills who may be suspicious of a school-like atmosphere.

Then, too, academic methods are particularly inadequate in teaching human relations. As has been said, "Wisdom cannot be taught;" it must be experienced. There are a great many ways this can be achieved, such as observation, problem-solving, role-playing, apprenticeship, practical demonstration by video-taping or tape recording for such topics as interviews, teamwork between a staff and volunteer trainer, or counseling situations.

The "new" volunteer may need a form of tutoring rather than a group training experience for practical reasons: transportation to a training center, unusual or broken working hours, young children and no available baby-sitter, a physical or age handicap, or perhaps unique learning needs that can be fulfilled by experienced peers rather than by a "traditional" trainer.

Too often pre-service and in-service training programs for volunteers are conducted by an agency staff member trained in an academic approach. Perhaps the most important reason for the emphasis on participation in volunteer training is the attitude toward teaching and learning needed by the trainer: this individual, too, is a *learner* who should learn *with* and *from* the volunteer.

The Learning Climate for Participatory Methods

The trainer or group leader must be concerned with the creation of a learning environment for any type of participatory method, whether it be discussion, role-playing, problem-solving, or case

method. In the latter, the participants should not expect ready-made answers from "the expert" and the learning climate must set this tone so that the participants can focus on the particular content which the case study is to help teach.

The creation of this learning climate includes such conditions as are favorable for any kind of participatory training: a manageable group size, a room arrangement where everyone can see and hear everyone else, opportunity for introduction and/or name tags or cards large enough to be seen and read by everyone. The session should start with an explanation that this will not be a question-answer period with correct answers given or judged by an expert. Rather, the session will be in the form of a general discussion with a problem-solving approach; everyone, including the educational leader, will explore the topic together.

In addition, the leader must clarify in his or her own mind whether he or she will carry the role of discussion leader or whether this role will be assigned to a participant. If the participant is to carry the discussion-leadership role, what preparation will be needed? Or can the discussion be carried out in round-table fashion without an identified leader (in that instance, what guidance must be given to the group or groups?). What kind of recording and reporting will be necessary if the case or cases are discussed by subgroups?

The Discussion Groups

Basic to all types of participatory education is the discussion method itself. The main elements are informality, flexibility, and adaptability. The approach should be friendly and informative on the part of the leader and never slick or "professional" in the sense of an authority figure.

As noted earlier, the actual learning takes place through thinking or discussion about the topic, usually triggered by or guided through questions posed by the leader or attached to a written assignment. The group draws upon its own experiences and knowledge, analyzing and assessing the information gained in order to sift the issues and identify the problem or problems involved.

The Case Method

The case method is one of the more important educational approaches for working with individuals and groups. The method itself is more than a technique or an instrument for teaching. Developing skills and abilities in thinking logically and working in

harmony with others are essential aims of this method. The benefits of understanding the behavior pattern and interaction of individuals and groups thus becomes available to those who participate in this type of educational experience.

Rationale for Using the Case Method

When summing up the rationale for using the case method in participatory training programs, the following criteria for using cases might be reviewed:

- The specific case should be carefully selected as an aid in reaching the objectives of the learning experience.
- The general objective should be to teach understanding, attitudes, skill in working with or relating to people individually or in groups, and not the transmittal of new information or the drill and practice of skills.
- The subject matter should be concentrated on interpersonal relations and the topic should permit or require a problem-solving approach rather than *one* correct or best answer.
- The group should be ready for active participation and should be somewhat acquainted with the issue or issues under discussion.
- The participants should be able to feel some identification with persons featured in the case—the case situation must be as realistic as possible.
- The "trainer" or teacher should be willing and able to assume the roles of discussion leader, resource person, observer, consultant, or guide rather than that of lecturer or subject matter expert.
- There should be enough time for full presentation and discussion of the case.

Helping the Participants Carry Their Role

The learners in the discussion method are actively involved in their own learning and are therefore involved as well in a form of self-development. Since a high degree of involvement on the part of group members is required when using this method, each one becomes a contributor to the making of a decision or to the solution of a problem. Each participant must learn to think through a decision or a problem individually; yet work with the group in the discussion process. In maintaining a group role, the participant must learn not to depend on the leader or on his or her fellow group members, but should be interested in them and their contri-

butions. Learning the unique set of abilities, attitudes, and experiences of each group member is the task of every participant, not only that of the trainer-leader.

To achieve this relationship the leader must go beyond the routine procedure of having people introduce each other briefly by name or of using name tags or cards. The leader must help the group members to get to know each other better and to take an interest in why someone manifests a given point of view, opinion, or attitude toward the total topic or one of the persons in the case situation. For example, often in group discussions on case studies or role plays, some group members will raise questions about why people do certain things or why they behave in a particular way. The leader then has a responsibility to help the participants realize the difference between a generalization about "people" (an ethnic group, or all men, all women, etc.), and the behavior of an individual or indiviuals in the case. The effect of the behavior on others and the interaction between persons in the case are important factors for the group to become aware of; it is the function of the leader to help members realize this. The leader does not *tell* the participants what the interaction is or might be, but he or she might pose some questions that will help them increase their sensitivity and awareness not only in regard to the discussion topic but in regard to the others in the learning group.

If the group is large, it is difficult, if not impossible, for every member to make a contribution because many of the participants become invisible and rarely get actively involved in the discussion. On the other hand, if a group is small there may be a lack of variety of experiences to draw upon. Generally, discussion groups are considered small if less than 10, medium if between 15 and 20, and large if more than 25. However, the leader cannot think of numbers only. A small group may not offer the enrichment desired by its members because the number of differences in personality and background are limited which another group of the same size but different composition provides. When the learning group itself is large (50–100), it is advisable for the leader to form subgroups of 12–15 members for the actual discussion.

WORKING WITH SUBGROUPS

Since the trainer-leader cannot be present in the subgroup discussions, he can demonstrate again his indirect rather than only direct leadership role. He can prepare simple and clear instruc-

tions to the smaller groups so that they can function without a prepared leader and/or recorder. Sometimes the leader might give the groups an outline for the discussion, with space provided for a group member to make notes under each question; the sequence of the questions must be carefully considered. It is also possible to give the groups a written case with one or more questions and the instructions to "find someone to lead the discussion and report back to the whole class" or "find a discussion leader and recorder-reporter for your group."

Often it will be advantageous to designate discussion leaders for subgroups ahead of time and prepare them for their task. It is not necessary to find people with expertise in the content area or subject matter, nor need they have equal skill and abilities. What is important is to select individuals with some degree of sensitivity to problems of group maintenance, and willingness to learn more. A briefing session must be conducted to acquaint the discussion leaders with the case, the case method, and with the plan for recording and reporting. If the discussion questions are spelled out and the issues not too complex, the trainer-leader may suggest to the subgroup discussion leaders to ask for volunteers to act as recorder-reporters. They should be selected because of their ability to listen attentively and report accurately in relation to the key question(s) in the case. Since the cases are not very long, the recorder-reporter need not observe group process as an assigned person sometimes does in longer case discussions. If the reporter is new at this job, he or she may not be able to participate fully in the group discussion because he or she may lose the thread of the discussion by thinking up and interjecting his or her own ideas. The trainer-leader must make it clear in the briefing session to the discussion leaders and recorders what their respective roles are and how they are expected to work together.

The most important decision for the trainer-leader is the way in which the subgroups are to be formed. The class may be composed of people who work in the same office or are members of the same club or civic organization. The session may be focused on a recruitment problem or on making a decision in a controversial area. Sometimes there are problems of status differences in homogeneous groups, especially if the members are all from the same company. The trainer-leader can divide the group so that subgroups are formed to include people with the same level of experience and background. For example, supervisors might form one subgroup and office staff another; or administrative volunteers

might be included in one group and program service volunteers in another. On the other hand, the trainer-leader may decide that the topic is one where all points of view would be helpful in which case the subgroups might include individuals with different jobs and status levels; the shared experience and increased awareness developed by hearing directly the opinions and reactions of others may prove beneficial to the agency and the staff at all levels.

"Kickoff" Case Situations

In order to trigger or kickoff a discussion in a large group, occupy a small work group, or help a home study volunteer clarify his or her thinking or plan some possible action, brief situational problems can be used with the challenge: "What would you do if . . . ?" or "What would be your responsibility if . . . ?" Such problems can be used also to "test" the understanding and application of content covered in a previous session.

Examples of "Kickoff" Case Situations

As a board member: What would be your responsibility if . . . ?

- You don't agree with a majority decision on a policy (you voted against it) and are asked to explain it to the membership body.
- You overhear a remark that is very critical of a staff member in the agency.
- You discover a picket line at the entrance of the agency when you arrive to chair a meeting there that morning.

As a committee chairperson: What would you do if . . . ?

- Some members of your committee appear to be trying to form an opposition clique in order not to cooperate with you.
- You find the minutes of the board meetings have not included accurate reports of committee activities or omitted them entirely and no one seems to have challenged this.
- A committee member says he is resigning because he overheard another member of the committee making an anti-Semitic remark about him.

To discuss practical situations like these with, for example, new board or committee members individually or in a group, arouses interest and induces active participation when used following, preceding, or in conjunction with a review of job responsibilities.

For example, one individual or one group could be asked: "What additional information do we need?" or "What are the board member's responsibilities toward the president or the executive direc-

tor in this situation?" or "What are the committee chairperson's responsibilities toward the committee itself or to the staff advisor (if there is one)?"

It should be noted that the questions must be worded so that the implications of only one solution to a problem is avoided. "What would you do?" needs at least the addition of "and why?" "What might you do?" implies more leeway. Sometimes "What possible approaches or alternatives can you suggest?" could be more appropriate in the situation.

By using more specific questions for a case discussion, an even greater variety of questions is possible, as in the following case about the Nominating Committee of a national voluntary organization and a case on shared leadership used in a home study course for adult advisors of a high school health careers club.

CASE: THE NOMINATING COMMITTEE

You are the new chairperson of the national Nominating Committee and presiding at your second meeting. Agreement regarding the officers has been reached, but there is great difficulty with the selection of directors; suggestions for candidates have been submitted by many of the state chapters.

One of your committee members is promoting a candidate from her own state; another recommends a personal friend with whom she has gone to school; Mr. Smith suggests one of his service club pals who is very influential in another national organization to which they both belong; and a fourth committee member who wants to catch an early plane home, suggests either putting them in alphabetical order and then taking as many as needed or taking people from those states which were not represented on the executive board last year since all names were suggested by state chapters anyway.

Questions:

As chairperson what can you do to restore objectivity to the committee deliberations?

or

As chairperson what can you do to help the committee members become aware of their personal involvement regarding their candidate and arrive at a more businesslike and democratic approach to the selection of candidates? The second version gives the hint that the different committee members may need to be approached in

different ways, also that possibly their proposals vary in the degree of merit.

Further questions:

Both versions could be followed by:

What is the job of a director on the national board of the organization? What qualifications make a good director?

or

What qualifications—background in training and experience, other organizational affiliations, personality, special interests, etc. —make a good director?

and

What should the committee be looking for in candidates for the Nominating Committee?

The selection of questions would depend not only on the purpose of the session:

Is the focus on committee management, human relations, parliamentary procedure?

But on the setting:

Are we dealing with people from one organization or several? Is it a special training session or an informal—maybe spontaneous—effort in helping a specific group with a specific problem and using the case example to distract the committee from its own difficulties and thereby forcing a more objective approach?

CASE: WORKING WITH CLUB OFFICERS[1]

If you were the adviser of a high school Health Careers Club, how might you handle the following situations?

a) The club members have elected a very busy senior as president. She is active in other groups, participates in many social activities, and thinks that a careers club president needs only to conduct the business meeting once a month. The other officers complain to yon about the lack of planning and organization.
b) The club president asks for help in keeping two very vocal members from talking too much at business meetings.
c) The club bylaws state that a new president is to be elected each year. The club wants to re-elect last year's president who is willing to be president for a second term.
d) The president asks you what to do with the vice-president.

There are chairpersons of hospitality, membership, program, publicity committees, but the vice-president has no specific responsibility.

e) Some club members say to you that they never get a chance to speak up at business meetings because all decisions are "railroaded through."

The same case situations could be adapted for use in a living room learning group, possibly with the same basic comments, but by rephrasing the instructions on how to proceed in such a group "self-learning" situation without an instructor. For example, it could be suggested that all participants take up all five problems individually and then compare their solutions; or they could work together in pairs or teams on one or more of the problems and then report; or each group member could be given a different problem for a brief thinking period and the whole group would then listen to and question his or her approach. The basic question could remain the same: "What would you do if you were the adviser?"

Example of a Trainer or Volunteer Leader Problem

CASE: WHY DON'T YOU *JUST* TELL *US?*

The program at a weekend conference for teachers of an adult school had included a lecture on how adults learn and a film presentation on discussion leadership—both followed by question periods, and demonstration and practice of audio-visual equipment.

In order to have a change of pace, more general participation, and an opportunity to see some feedback, the group of forty persons was to be divided into groups of eight and assigned different case studies on adult classroom situations.

There was obvious reluctance to work in small groups and after the case studies were distributed, someone said: "These problems are too contrived; they could not possibly happen to us. Furthermore, I think we are all mature enough to be treated as adults instead of having to play games. We are here to hear from you, the experts, the proper methods for teacbing adult students and we are quite capable of taking notes on points applicable to our own situation."

There was at first some hesitation, then quickly increasing applause by the class.

Questions:

- As one of the three instructors and chairperson of the particular session, how might you handle this situation?
- As one of the other two instructors not in charge of the session, what, if anything, might you do?

Consider:

- In which way are the students demonstrating an understanding or lack of understanding of adult learning and adult education?
- If the instructor team wants to give the group a practical demonstration of how students can share in program planning, should they change their original plan—although it would have to be an unprepared, ad-lib kind of class session?
- How could some of the suggestions for getting ready for a case presentation discussed in this chapter be used to create a state of readiness for the case method on the part of the student group?
- What would be the advantages and disadvantages of discussing with the group principles and practices of the case method as such, with definite application to the subject areas of these students, instead of, or prior to, using the prepared case studies?
- Under what conditions would it be possible to have the students develop and test cases instead of discussing the prepared cases?
- How could the instructor team evaluate *with* the group the way in which the conflict was handled and to draw generalizations on handling controversy in groups?
- How could the instructor team get across to the group their satisfaction with the group for speaking up instead of complying—and complaining afterwards?

Writing Case Studies for Participatory Training

The use of the simplified case-study method involves the writing of the case situations in such a manner that the participants can readily identify with both the characters and the problem.

In order to assist those unfamiliar with the development of case situations for training, some guidelines for the writing of simplified cases follows:

The case must be built around an actual or typical core problem,

but the details are different from the actual situation. This is often a more effective learning experience because it is less painful for the individuals concerned; it does not imply criticism of their handling a situation or doubt in their ability to do so, but allows them the freedom to think through thoroughly many facets of a problem, with empathy for another person in a situation similar to their own, but without their own deep emotional involvement.

Case studies can be used in group sessions, individual conferences, correspondence courses, or consultation with two or three persons involved in an actual problem situation; the latter requires particular skill on the part of the supervisor or educator.

The following pointers for writing simple case material for volunteer training programs have been developed and tested by the authors:

1. Be realistic—think of the individuals whom you are helping to learn; they should be able to identify with the key person in the situation.
2. Decide on a specific area of concern within your total topic and emphases.
3. Narrow it down to a concrete problem in volunteer relationships.
4. Think up the cast of persons in your case study.
5. Now think of a specific situation, typical, possible, or actual—an issue or dramatic conflict of real importance. There must not be an easy, plausible solution, but some immediate action with future implications should be required.
6. Now write the case situation.
7. Next, go through the steps of clarifying, stripping irrelevant material or adding missing details.
8. List the question or questions to guide the learners in their thinking about approaches to the problem, stating that there would be several alternatives instead of just one answer.
9. Last, recheck the case in the light of the questions to see whether it is:

- clear and logical?
- plausible?
- interesting?
- impartial and not with an obvious solution?
- neither too detailed nor too general?
- will case and questions stimulate evaluation of the volunteer's own relationships within the organization, not distract from it?

Some Additional Participatory Methods

ROLE-PLAYING AND VIDEO TAPES[2]

An effective way of training volunteers is by combining role-playing with the use of video tapes. In Chapter 5, the authors have included a volunteer job description that focuses on the volunteer counselor role rather than on specific tasks. Here the role, or behavior, of the volunteer is at the heart of the crisis service. The volunteer who provides counseling to a rape victim or a teen-ager with an overdose of drugs must focus on the goal of helping the client. Volunteers often need to be aware of the type of people crying for help, however, and to know how to develop relationships of trust in order to provide the best counseling service.

Role-playing helps to develop a sense of self-awareness that is useful to the volunteer and the video tapes provide a deeper perception of human behavior and a means of evaluating roles.

In using role-playing techniques similar to the situations described in Chapter 5, the trainer could demonstrate with an assistant trainer how to answer a call for help by asking the assistant to create a crisis victim role and then play this role in the setting of the service office. The trainer then conducts the drop-in crisis interview with the assistant "client" which is video taped. The demonstration shonld bring out salient points about how to build trust and confidence with the client, how to elicit as much information as possible on the nature of the case, and how to answer the client's questions without giving advice on a course of action.

During the role-play demonstration, the trainees take notes on the process for the purpose of writing a report on the case. After the demonstration the trainees write the report based on the demonstration. The trainer asks the trainees to read aloud certain parts of their respective reports in order to compare what they have observed and written. This serves the purpose of helping the trainees share the insights of their peers. After sharing the reports, the video tape is played back and the demonstration is reviewed by the trainees again to check on what information was obtained, what is still lacking, and what aspect of handling the crisis call could have been improved.

The training session can be expanded for these volunteer crisis counselors by role-playing the continuance of the situation, as, for example, accompanying the client to a hospital or police station. Two trainees could then play the roles and the situation be video taped as before. When the group views the tape, the trainer might

raise questions such as: "What effect did the counselor's tone of voice have upon the client?"; "What did you notice about the counselor's facial expressions during the interview?"; "What approaches by the counselor elicited responses from the client?"; "What did not?"

These questions can then be answered by report sheets and compared by reading aloud in the training session. Or the questions can be used as leading topics for discussion by the training group. In addition, roles can be played identifying with individuals of differing social classes, ethnic, religious, or racial groups, in order to bring out any problems of bias or prejudice in the counseling process.

This type of training offers a feedback of peer observations and a means of learning by doing so invaluable in interpersonal relations.

MULTIPLE ROLE-PLAYING

Another problem-solving method is multiple role-playing with three participants comprising a triad: the client, the counselor, and the observer. Each member has an opportunity to experience the three roles in a realistic situation.

Problems selected can focus on volunteer-staff relations, new worker versus long-entrenched worker, age versus youth, racial or ethnic situations. The problem should be prepared in writing and read from what is called the "client's worksheet."

If the same problem is given to several triads simultaneously, the trainer can record observations for a summary report.

WORKSHEET FOR MULTIPLE ROLE-PLAYING (MRP)[3]

1. Think of a problem or concern *you* have in working with people. It should be a problem or concern on which it would be helpful to receive some consulting assistance from a colleague.

2. What has been your experience with this problem up to this time?

INSTRUCTIONS FOR MRP

1. Each member of your triad will have an opportunity in each role:
   Client—is the person *receiving* help
   Counselor—is the person *giving* help
   Observer—is an artificial role just for the purposes of this exercise. The observer is *not* to talk during the role-playing of the Client and the Counselor.

2. After each fifteen (15) minutes, members of the triad should rotate roles as follows:

	CLIENT	COUNSELOR	OBSERVER
2:15–2:30	A	B	C
2:30–2:45	B	C	A
2:45–3:00	C	A	B

3. Each role-playing sequence should start with the counselor and the observer reading the client's worksheet. Then, client and counselor interact, with the observer playing no verbal role. His or her observation will be useful later.

LISTENING TEAMS

Group leaders, case aides, volunteer trainers, directors of volunteers, and staff working with volunteers should be aware of the need to develop the ability to listen effectively. Officers of voluntary agencies and board members, including committee chairpersons, often need to improve communication skills in order to carry out their responsibilities. The skill of listening is an important component in the communication process itself. "Telling about" the need to listen or explaining why listening to others may help to close the communication gap is not the way to improve the skill. Listening is a skill that can be learned, but it has to be by experience and participation in the process. Participation as a member of a "listening team" offers one way to learn "how to listen" better.

Listening teams are also an effective way to involve participation of an audience in a large meeting; therefore the following guide may be useful in training and in the conducting of large meetings.

A Guide For Using "Listening Teams"[4]

PURPOSE: A method for increasing audience participation and a technique for improving listening skills.

TECHNIQUE: The audience is divided into teams prior to a platform presentation: speaker, panel, film, etc. This can be done by sectioning on the basis of rows or by marking the auditorium into right, center, and left sections.

Before the presentation, the audience can be asked to divide itself into four listening teams (more or less, depending on the size and nature of the session). Each team is then given an assignment. For example:

TEAM I —to listen for points needing clarification.
TEAM II —to listen for debatable or questionable points.
TEAM III —to listen for ideas on which action should be taken.
TEAM IV —to suggest points that the speaker had left out.

When the presentation is over, each team is asked to make its report, leading into general discussion.
Another technique used is to appoint a team chairman and have contributions written down by each audience member and passed to the team chairman at the end of the presentation. The team chairman can synthesize contributions and report them to the platform. Or each section can be divided into small groups who are given a few minutes after the presentation to perform this synthesis and appoint a reporter to record group findings to the total meeting during the general discussion. This technique is useful for very large group meetings but the audience must be clearly instructed in advance of the presentation so that everyone in the audience understands what is to be accomplished.

GENERAL USE: The general method can be adapted to suit a given program. If a debate is presented, for instance, one team might listen for the "pro" arguments and another team for the "con" arguments. An additional team might be included to draw up a set of conclusions, after hearing both sides.

A GOOD LISTENER: An alert listener tries to understand what the speaker is saying. He holds back momentarily, however, on expressing his own opinions, ideas, and preferences so that he may more clearly receive the speaker's message. He tries to understand it so that he can state it in a way that would be completely acceptable to the speaker. Although this does not mean that he need agree with the message or point of view.

> Next, the good listener tries to match his ideas with those of the speaker—sifting, weighing, accepting, rejecting what has been said or presented. He draws upon his own private store of knowledge to compare and to evaluate—each individual makes his contribution by talking or listening in relation to his own store of knowledge, insight, and experience.
>
> Creative, concentrated listening is as important a skill as talking. Quiet, active listening is not passivity but an art in itself.
>
> The use of a Listening Team or Teams in any meeting indicates a collaboration between audience and platform toward the accomplishment of some common task.

This chapter has concentrated on some participation methods for volunteer learning. The various methods and techniques outlined here are in line with the more recent developments in applying the "reality" principle in the educational process—providing learning experiences that are relevant, concrete, experiential, and readily identifiable to participants.

There are many ways in which the volunteer trainer or "teacher" or staff member responsible for a volunteer training program may adapt and modify the models offered, but the important factor of *involving* the learner in the learning process itself must not be left out. Nor should planning and providing a proper climate for learning be forgotten. Therein lies the challenge to those who would use the participation approach in the training and development of volunteers.

NOTES

[1] *Self-Help Training Course for Advisors of Future Nurses Clubs* (New York: Committee on Careers, National League for Nursing, 1962).

[2] Adapted from "Video Tapes and Training of Volunteers," *Volunteer Courts Newsletter*, Vol. 4, No. 6, December 1971.

[3] Adapted from Training Session for Volunteers in Cooperative Extension conducted by Dr. Einar R. Ryden, University of Maryland, 1970.

[4] Adapted from "Improving Large Meetings," *Adult Leadership*, December 1952.

CHAPTER

7

Development of educational leadership—volunteer and staff

> Time spent in developing leadership is repaid not once but many times over the years. —CHESTER R. LEIGHTY*

In the preceding chapters of this book we noted that the knowledge, attitudes, and skills gained through informed group discussion, the cooperative effort of committees, the team spirit developed when working on a special project, and the analysis of group behavior learned on the job or when working with a task force are positive learnings and an enrichment of the human personality. Therein lies the premise that organizations and agencies with programs based on respect for the dignity and worth of individual volunteers have inherent in their structure a fertile ground for the development of educational leadership. This does not mean that there must be a formal leadership training and development program, but that the agency or organization involves its volunteers in decision making and provides learning opportunities on issues and processes of such participation.

Organizational Climate for Leadership Development

An organization with a simple or with a complex structure, whether large or small in size of membership or constituents

* *People Working Together* (New York: United Neighbors Association, Philadelphia and the National Federation of Settlements and Neighborhood Centers, 1960).

served, whether building-centered or community-centered, whether a public agency or a voluntary association, can find, develop, and utilize its own leadership potential for educational purposes. Such groups need not hire a Training Director and, thus institutionalize training and development. Even if an organization is without a training program, or possesses seemingly limited resources for setting up a formal program, it can recognize that people in an organization are important. One of the goals of any agency should be that of having a sufficient number of people in the right jobs at the right time. Translated into action, this means having qualified individuals contributing their highest skills and possessing a sense of commitment to the success of the enterprise.

The realization of educational goals for individuals and groups, from a metropolitan police force to a neighborhood project, presents a formidable challenge at any time; such an endeavor is not an impossible achievement provided careful inquiry, study, and planning are part of the process. There must be a firm commitment on the part of the administration or the leadership group of any endeavor that the educational development of volunteers or members is important and that constant support and encouragement should be available to every participant.

How can an agency or organization provide the atmosphere and educational opportunities for individual development so that a climate of confidence, appreciation, and encouragement is apparent to all involved?

Special assignments can be given to provide opportunities for development and recognition. Goals can be planned that will insure cooperative effort, a chance to work with others, to learn new ways of doing things, to participate in a stimulating task and meet different people while on the job. A committee member could represent the group occasionally rather than having "always the chairperson" do it. There can be task forces and ad hoc committees with the avowed purpose of developing educational leadership rather than working only with the numerous "institutionalized" committees and departments. The cross-cutting of jobs and the cross-fertilization of ideas to open up opportunities to spot potential leadership are the approaches needed today. This is true in industry and business as well as in government and voluntary associations. But, if such approaches are decided upon, there must always be a clearly defined purpose and an agreement on what skills are needed and what the participants will derive from the experience or from the special assignment.

Sources of Educational Leadership

Every group has individuals in leadership positions who have responsibility for working with other voluuteers individually or in groups. The stated purpose of their position may be to get a task done with the help of others—as in the case of a chairman of a project or operational committee—but only with the double focus on the work to be done *and* the people involved will the participants grow in commitment to the program and awareness of their own abilities as the task is accomplished.

The following chart (pages 148–149) shows that every organization or agency—whether large or small, professionally staffed or run entirely by volunteers—has personnel in a variety of positions with the responsibility for helping members or volunteers become more informed, more active, more effective. The chart can be used as a checklist to help identify the "educational leaders" in an organization. Whether these are in contact with individuals, with groups of individuals or both, they all need the commitment to membership and volunteer education and development if they are to carry out their roles effectively.

Another category of educational leaders make their contribution less on the basis of their position or office in the group than by virtue of their individual backgrounds and special skills. If we look at the individuals serving as volunteers in various organizations (especially on boards and commissions), we will find professional men and women, housewives and schoolteachers, union stewards and company managers, high school youths and retired professors. Within the new and returning volnnteer group will be found persons of prestige and status in the community who will exercise leadership by virtne of that fact. Such leadership will not have a lasting effect, nor will it help to develop others, nnless there is a recognized educational implication in the respective leadership function carried by these individuals.

Among the group of activity volunteers, too, there are men and women, articulate and informed, who can speak for, and communicate with, their co-workers and neighbors with persuasion and skill. The range is wide and varied, despite the particular organizational framework, and it is imperative that the officers or administrative group responsible for fnrthering the purpose of the organization, club, or group, seek, find, and encourage this leadership potential.

Edncational development means more than the right person in the right job, although that is a real achievement in any agency.

KNOW YOUR EDUCATIONAL LEADERS

Check	Leaders	Elected	Appointed	Employed	Individuals or Groups Involved
( )	1. *Officers*				
	President	x			The total membership The board members The executive committee or group of officers The chairpersons appointed by the president
( )	Committee Chairperson		x		The committee members
( )	Program Chairperson		x		The total membership or special interest groups
	2. *Members of Certain Committees*				
	Nominating Committee	x			Prospective officers and board members individually
( )	Membership or Recruitment Committee		x		Individuals or groups of non-members
( )	Volunteer Personnel or Training and Education Committee*				Board and membership groups with whom the committee consults regarding planning and evaluation of training and development programs
	3. *Individuals With Special Responsibility*			either	Any group of members, officers,
	Instructor, teacher, or trainer*		x	x	direct service volunteers brought together for a training program

Know Your Educational Leaders (Continued)

Check	Leaders	Elected	Appointed	Employed	Individuals or Groups Involved
( )	Project Director or Leader or Supervisor		either x	x	Program or direct service volunteer
( )	Coordinator or Director of Volunteers		x	x	All volunteer, staff
( )	Director of Training and/or Development* (if there is one)			x	Members of Volunteer Personnel or Training and/or Development Committees and other administrative volunteers sharing in the planning or administration of training; any member of the organization (including elected and appointed leaders) participating in educational programs.
( )	Executive Director (if there is one)			x	Board, committees, total membership, other staff

* Training and development is primary responsibility.

The world today is not a static one and the rapidity of change has almost become a cliche. Mobility and multiple skills have become imperative for all individuals working in voluntary, industrial, business, or government enterprise. The challenge is one of developing individual potential and of encouraging human growth. Organizations and agencies will need to evaluate their present situation in order to look beyond for future implications. This cannot be done in isolation but might be thought of as a bridge to the next step and the next one with people and resources ready and trained for use when and where needed. The personnel to undertake this training in educational leadership may be found among the policy-making group or it may be found among the rank and file. It will be important to look wide and far, but also to look carefully at what is right at hand. The exercise of educational leadership for adults is often more effectively carried out by persons who possess an inquiring mind and a flexible approach than by those who rely upon textbook accuracy and rigid adherence to compartmentalized knowledge, regardless of whether or not they are holding one of the elective or appointive leadership positions at the time.

Identifying Potential Leaders

There are numerous opportunities to observe and to identify educational leaders, or potential leaders as, for instance, in committee meetings, group discussions, counseling sessions, and in the various types of assignments carried out on a short-term or long-range basis. Persons who participate with skill on panels or in leading discussions, individuals who regularly write and deliver informative and succinct reports, men and women who organize and instruct campaign workers for local fund drives, individuals with special skills or know-how who evidence informal leadership when carrying out a task—these are the people who are worthy candidates for educational leadership. Then there are the individuals who are sought out by others for advice, for information, or for guidance on action to be taken. These individuals may or may not be the status people in an organization. They may not be the office-holders or committee chairmen. Very often they are not. Nor are they the so-called prestige people in the community. But they are the ones that others *seek out* for one reason or another. These are the people who are influential in their own sphere—a neighborhood block, a school district, a village or town. Perhaps they have become known through church work, political activity, long residence, personal or family attributes. When such individuals speak at a meeting, others listen and follow. When an issue

has been raised and feelings are running high, these are the people who *mediate,* who make a productive contribution to the discussion. Sometimes they are the individuals with specific manual skills who initiate a new or better way of doing a routine task or who demonstrate a time-saving method of completing a chore or technical piece of work. This form of leadership which combines "how-to-do" skills with respect for people and their efforts has often been seen and appreciated in hospital coffee and gift shops, on fund-drive mass mailings, on gift packaging for overseas relief, and other volunteer projects. A guide for identifying some of the skills and background appropriate for an educational leader or potential leader follows.

GUIDE FOR IDENTIFYING POTENTIAL EDUCATIONAL LEADERSHIP

Some questions to ask:

General:

What are the individual's convictions and feelings about:

- The purpose and philosophy of the organization, the program and the community?
- Adult learning, including his or her own learning?
- Working with volunteers representing a wide range of age, capacity, education, and experience?
- Social change and social action?

Specific:

- What degree of competence does the individual have in some particular subject matter or skill?
- Does the individual possess personality traits that make for effectiveness in the leadership of adults? For example:
- Is he or she friendly? Interested in people?
- Does the individual exhibit flexibility and willingness to experiment?
- What degree of imagination is evident? Humility? Patience?
- What evidence has been seen that the individual possesses evaluative judgment of programs and people? To what degree?
- What kind of leadership style does the individual have as, for example, interest and skill in stressing content or in furthering group or individual development? Is it balanced between

these two? If so, it is LEARNING-CENTERED, indicating high potential for educational leadership, regardless of specific roles in the organization and community and whether the individual will deal primarily in individual or group contacts.

Most organizations have an elected nominating committee whose task it is to recognize and recruit candidates for the elected leadership of the organization. The members of this committee, therefore, have a tremendous influence on the future of the group and should themselves be very carefully selected for nomination.

Personal and General Qualifications Needed by Nominating Committee Members (not in order of ranking importance):

- Interest in, and enthusiasm for, the purpose and program of the organization or agency.
- Willingness to work and devote considerable time to the furthering of the purpose and program of the organization.*
- Civic-mindedness and social vision.
- Objectivity.
- High qualities of tact, integrity, and discretion; ability to hold one's own counsel.
- Courage to express ideas and to defend one's convictions.
- Sound judgment and skill in evaluating possible nominees.

SELECTING INDIGENOUS LEADERS

The willingness to learn, in special pre-service training as well as with and from the group members, is especially important for the indigenous leader in community development programs. "It is quicker to give the 'insider' technical knowledge than the 'outsider' community knowledge," according to guides for the selection of local workers for community development.[1] But the "insider" must be selected carefully on the basis of evidence of his leadership potential. United Nations field staff in Ceylon held informal conversations with the villagers, keeping in mind those points which are excerpted here. We have added similar simple questions which might be asked in getting nominations for a neighborhood or tenant council or for representation in community development programs in an urban community.

* That the nominating committee work is not done quickly just before the annual election has been discussed in Chapter 4.

Questions Asked of Villagers:	Possible Adaptation to Urban Community:
Whom does this family most enjoy visiting in the neighborhood?	With whom do husband and/or wife have social contact in the neighborhood?
Whom would this family rather entrust their farm to if they had to leave for a short time?	Whom would this family ask to check their home or apartment in case of temporary absence?
Whom does this family most frequently consult in such matters as buying or selling a cow, trading a piece of land, deciding what to plant, etc.?	Whom do husband and/or wife most frequently ask where to get the best deal on household equipment, major repairs, real estate?
In case of emergency, sudden illness, whom would the family turn to for help?	With whom would husband or wife leave young children in case of emergency?
Whom of the godfathers of their children does the family most esteem?	Whom would the parents consult regarding questions about problems with their children, aged parent, or sick relative?
Whom would this family entrust its money to if the need to do so arose?	Whom would the family consult about insurance, investment, or legal questions?

Persons suggested through the use of these or similar questions may be quite inexperienced in community or organizational work, but they would be truly qualified to represent their peers and would most likely be able to learn skills and techniques for working in organized groups, both in formal and informal ways.

Utilizing Help from a Consultant or Resource Person

Resource persons are individuals with a reasonable amount of expertise or experience in a particular field or discipline. They may supplement a leadership team of discussion leader and recorder, but should *not* take over the role of the leader nor dominate the group discussion by reason of authority.

CHECKLIST FOR WORKING WITH A RESOURCE PERSON IN A DISCUSSION

	Yes	*No*
1. Have we clearly stated *why* we need a resource person for the group?	____	____
2. Have we identified how we intend to use a resource person?	____	____
3. Has the discussion leader determined how he or she will prepare the resource person?	____	____
4. Has someone been assigned to collect or assemble the material and background references the resource person may need?	____	____
5. Has the recorder been briefed on the role of the resource person?	____	____
6. Has the leadership team (discussion leader, recorder, and resource person) set a time to confer in advance of the discussion?	____	____
7. Has the leadership team decided on any follow-up after the discussion if appropriate?	____	____
8. Have we determined how the use of a resource person in the discussion group will be evaluated in the light of future use?	____	____

An outside consultant may also be helpful to an agency or interagency leadership group for advice on some aspect of the total volunteer program and the checklist can be adapted for such purpose. Additional questions might be:

9. Has someone been assigned to carry the reporting function during the period of the cousultant's service to the group?	____	____
10. Have we discussed who needs to know about progress to date, proposed plans, suggestions and recommendations?	____	____
11. Have we identified what additional help we may need from other individuals, from the agency, from the community?	____	____
12. Have we determined upon follow-up after the consultant has left?	____	____

Training of Volunteers for Educational Leadership

Planned education of volunteers for leadership roles should utilize a variety of methods; a balance of observation, participation, actual assignments, and evaluation is most effective.

One organization has a specific plan for leadership development of its members with the following statement of purpose:

- to observe jobs which provide opportunity for leadership development;
- to illustrate the continuation of varying experiences which develop leadership qualities.

Procedures include:

- attendance at a committee meeting to learn by observation how committee work is shared through the joint efforts of all;
- attendance at a board meeting where committee work is presented, considered, and disposed of by the board as a whole;
- briefing on items of business at a general membership meeting evolving from board/committee work and requiring membership action;
- attendance at regional and national meetings and conferences, again after thorough briefing;
- service on interagency community boards and preparation either in informal discussion with other members serving on such boards or in board orientation and training programs conducted by the community group;
- guided reading; for example, on parliamentary procedure as a tool for effective participation in large group meetings.[2]

These "procedures" can be adapted for use by many organizations, large or small, especially in preparing elected or appointed board and committee members and officers.

A very different plan for leadership development from the ranks is based on the evidence that self-government or membership management in day care centers for older adults is a very effective device for stimulating older people to use their capacities for leadership, initiative, and responsibility. The positive values of self-government involve members in planning, in carrying out plans, in assuming responsibility for the center's management, in using the democratic process, and in the development of indigenous leaders. Members make their program preference known to the center staff, take part in solving problems of daily management (how meals are served, rooms are arranged for special programs, etc.), and plan for a fair rotation for the use of facilities. However, individual consultation and specific leadership training were found to be needed in order to avoid such problems as favoritism and other misuses of leadership positions. The training sessions provided opportunity for informal discussion of leadership problems as the leaders themselves saw them. Such practical topics as

agenda planning, opening a meeting, and writing minutes and reports were included also.[3]

Apprenticeship or short-term practical experience for new leaders can be used in any group regardless of size or program. An individual appointed as chairperson of a special project or ad hoc committee has an opportunity to try out his or her leadership skills, possibly with close supervision and help by the overall chairperson. At the same time, the organizational leadership has a chance of seeing the individual in action with other people, observing him or her unobtrusively, and possibly getting other members to know the individual in a leadership role. In a large organization, where the members do not know each other very well, the candidates for officer positions cannot only try out their leadership skills in this way, but also get acquainted with some of the voting members so that the name and qualifications on the slate become a person whom the voters have met and seen perform.

Special gatherings, programs, or large conferences are particularly suitable for this purpose; the program planning committee can involve incumbent as well as potential chairmen or officers in discussion team leadership roles. While it is true that there are differences between chairing a decision-making group—such as a committee or board—and a discussion or learning group, discussion leadership ability is absolutely necessary for any chairman or presiding officers—especially asking provocative questions, stimulating participation, handling controversy, refraining from voicing one's own point of view, and superimposing one's own opinion on the group except when there is a tie vote. Furthermore, serving as a member of a discussion leadership team—discussion leader, recorder, observer, or resource person—provides a practical experience in shared leadership and teamwork, an important aspect of educational leadership in any organization.

Teamwork and partnership can also be learned in the practical experience of shared responsibility by chairpersons, presidents, and other officers with their vice-chairmen, vice-presidents, board and committee members. It is a temptation for a good leader to be aware of the quality of one's leadership, of one's contribution to the organization or project, or of high standards of performance; but an educational leader tries not to make him/herself indispensable. Instead, he or she builds continuity and stability of leadership in the organization. The leader provides opportunity for a vice-president and others to take on real responsibility and to represent him or her, thus demonstrating confidence in their ability to carry

on. This does not mean that every vice-chairman has the qualifications for the chairmanship and automatically "moves up" into the top position. Rather, it emphasizes the two principles of "earned leadership" and "shared leadership" and the responsibility of the top leaders to make it possible for others to learn leadership by practicing it. These various possibilities of team teaching and team leadership will not guarantee that teamwork is learned and practiced; this can only happen in an organizational climate where everyone is concerned with the search for able people and with aiding in increasing their competence, confidence, and satisfaction as volunteers.

Training Staff Members for Educational Leadership of Volunteers

It cannot be assumed that all professional staff members in agencies, organizations, or institutions working with volunteers have the qualities of educational leadership, listed earlier, just because they are "staff." Their expertise may be in working with clients—individuals and families—in health care, fund raising, or public relations, but not in group work, informal adult education, or educational counseling. Some may look at supervision "as a management responsibility for overseeing work to be done" and not "as an educational relationship."[4] Others may, of course, also be lacking in genuine conviction about volunteering and be ineffective in the advocacy role for volunteers needed in the agency by the staff; for example, in working with board members who may feel no identification with program and service volunteers.

The opportunities for developing educational leadership within the staff group are similar to those for volunteers, discussed above. Here, too, the organizational climate is of great importance. This starts out with a common understanding that volunteers should not be considered "free help" or "primadonnas,"[5] that they supplement and enrich staff work, that they do not replace, and therefore are not a threat to, the paid staff. These concepts must be taught in the orientation programs held by an agency to all its employees—professional, clerical, maintenance. They all must realize that volunteers have other, primary responsibilities in jobs or home which must be considered in planning meetings and activities—in regard to time—("Please don't phone me between three and four when the children come home from school!" is a legitimate request) or place (such as changing a recruitment interview, committee meeting, or work session to a home or other place in the neighborhood).

It could mean that staff may occasionally have to be available before or after regular office hours in order to make it possible for volunteers—especially students or employed people—to be available for voluntary action. A volunteer's time must be respected, and staff must be ready on time with work materials, with written instructions on how to handle an office project, with work space for a group of oldsters or youngsters to send out a mass mailing, or with typed letters and reports for approval and signature of a board officer. These may be small things, but they are indicators of a total staff's attitude toward volunteers and some staff leader—executive director or coordinator of volunteers—must be sensitive to the agency's social climate and actively responsible for improving and maintaining it.

Professional staff members need more specific training depending on their role in working with volunteers. Two examples on how to plan and organize interagency training programs for directors or coordinators of volunteers were given in Chapter 3; these staff members are responsible for the total volunteer program of a school system, hospital, or large institution.

The Washington, D.C., Department of Human Resources secured a grant from the National Institute of Mental Health to research the impact of an organized and structured volunteer program on the work of a children's institution. A "Process Guide in Developing a Volunteer Program" was set up, tested in other departments of this multiservice agency, and systematized in "Guide for Staff to Work with Volunteers."[6] Its goals are to further "better understanding and better communication wherever volunteers and staff have opportunities to work together . . . in service-giving units."[7] This manual would be of help to any staff member working with program and service volunteers, with the ultimate educational leadership responsibility resting with a director of volunteers or an executive.

The many staff members working with boards, committees, and commissions need training in what constitutes effective staff service to a group of decision-making volunteers, a very special kind of educational leadership. Involved are assistance to the chairperson in preparing the agenda, planning for the discussion at the meeting, and handling the follow-up; assistance to the committee secretary by arranging for the typing and duplicating of minutes and reports; assistance to members with delegated responsibility for follow-up on decisions reached or preparation for the next meeting.

There are special situations where the staff member records the minutes or prepares minutes from tape recordings of the meeting. It is essential in all cases that minutes are carefully scrutinized by the committee and officially approved—with any needed corrections. This is based on the principle that decision-making volunteer groups with elected or appointed membership are an arm of the policy-making (legislative) sector of the agency while staff is "executive," carrying out the work within the framework of stated policy. For this reason it is inappropriate for staff to act as chairperson of a standing or special committee set up by a volunteer board or commission and accountable to such body. The staff advisor to a committee or the executive director working with the board of directors must give *indirect* leadership to such a group, "enabling" leader and members to function effectively. This educational role, in addition to working with individuals *before and after* a meeting, must be carefully handled also *during* the meeting in such manner as to add to rather than distract from the leadership role of the chairperson. Questions, rather than definitive statements, pointing to a resource or reference, or to some other aspect of the problem or issue, suggestions to call on one of the less outspoken committee members for an opinion, or for looking into notes of a prior discussion of the subject matter, or of some related topic, are some of the methods to be used with great tact and a careful sense of timing.[8] The staff advisor or executive must feel secure in this role; impressing the volunteer group with technical knowledge and jargon is not helpful but counterproductive to the board's or committee's functioning. Nor should staff feel inferior to a volunteer who may have great social prestige or a highly paid job elsewhere if a teamwork and partnership relationship between volunteers and staff is to be maintained.

EDUCATIONAL LEADERSHIP OF LEARNING GROUPS

Leaders working specifically as "trainers," "instructors," or "teachers" with a group of volunteers are often professional staff members or consultants, but the number of organizations working with volunteer trainers of volunteers is increasing. Many agencies realize that so-called lay leaders in adult education can make a significant contribution and that being taught by a member of "their own group" is always acceptable and effective among volunteers, providing that these volunteer teachers have the proper qualifications. The volunteers are often able to deal with life situa-

tions as their own life experiences have prepared them to do.

Staff and volunteer trainers need two kinds of qualifications: experience and/or training in the particular field or subject matter, and in educational methods and techniques for informal adult education. These include planning of a session or series of sessions, use of audio-visual aids, discussion leadership, and other participation methods requiring special leadership roles as described in Chapter 6. The trainer-leader in the case method, for example, needs not only competence in an instructional situation in general, group acceptance, and the ability to lead a discussion, but also knowledge of how to help a group draw upon its own experience and to discern the interaction among the individuals featured in the case study. This trainer should assist the group members to make their own decisions and to learn to make better decisions in the future. He or she should be able to change roles from discussion leader to resource consultant to evaluator, helping the group to unlearn some of the things experience has taught them and to recognize principles in the case which may be applicable with possible modifications in other situations. The role-play method—equally suitable in teaching problem solving and human relations—requires similar ability in helping learners reach their own conclusions rather than expecting approval of "the right answer" from the instructor. Agencies should make training in informal adult education methods available to their volunteer and/or staff trainers of volunteers—in special workshops or through apprenticing new with experienced trainers and following through with a systematic discussion and evaluation of the apprentice experience.

LEARNING TO WORK AS LEADERSHIP TEAM OF A LEARNING GROUP

In informal adult education and leadership training, team teaching has been widely used as one practical approach in teaching team work and shared leadership. The workshop method, frequently used in conferences and residential training of voluntary organizations, works with leadership teams. Groups utilizing the help of volunteer and part-time instructors often assign two or more leaders to a training program. There can be a variety of staffing patterns: a chairperson or generalist and one or more specialists or resource consultants to supplement his or her background; a head instructor and one or more assistants to work with

subgroups or special topics, consult with individual participants, assist with planning and arrangements; an instructor and an apprentice to learn through observation and assistance with specific limited tasks.

Whenever more than one leader are responsible for a group learning experience, it is essential that they plan together and decide in advance on division of responsibility for such things as teaching sessions and consulting with participants. However, each one should be ready to pick up on unforeseen responsibilities. For example, sections of a session to be taught by one or the other trainer should not be scheduled so tightly that a discussion of great interest is broken off abruptly; the second trainer must be willing and able to adjust the plans to some extent. And supportive, indirect leadership help from a colleague can be invaluable whether it is done by operating a projector, distributing materials, adjusting ventilation or temperature in the room, or asking a clarifying question at the right moment. This is not only appreciated by the training partner, but it demonstrates teamwork to the learning group, and is, therefore, a most appropriate approach to the training and development of teamwork and shared leadership in volunteer groups.

A special aspect of shared leadership in group learning experiences of organizations or agencies with employed staff is team teaching by a volunteer and professional leader. Whether the volunteer or the professional has the role of head trainer depends on the individuals and the training program. It is possible that the full-time professional is an expert in a field other than adult education or the special topic of the session, and it is very important for the trainees to see that it is the individual expertise which counts in volunteer training and education, not the position or status; and that a volunteer leader is not a "subprofessional" but a colleague and partner.

Self-Help for Potential Leaders

So far in this chapter the authors have charged the organizational leadership—both volunteer and staff—with the responsibility for creating a climate that encourages the development of educational leaders throughout all levels of the organization.

We now submit that educational leadership can also develop in the absence of such an organizational climate; for example, in a newly developed organization, or within a group in the process of expansion, reorganization, or one faced with a financial or person-

nel emergency. Sometimes the leaders of a well-established agency find themselves under internal or external pressures to produce "quick and tangible results." A shortsighted panic approach may lead to an administrative focus on the management of things and activities to the detriment of a focus on the development of people. The result is often low morale, apathy, or disunity within the membership and among the volunteer group.

Therefore, we address ourselves *now* to individuals with strong conviction about the purpose and goals of an organization or community program and about the capacity of adults to learn and develop, to persons whose leadership qualifications may not have been recognized. Such people are not to be considered "busybodies," "troublemakers," or "social climbers." Rather, they are to be considered worthy personnel of the agency as long as they are working within its purpose, policy, structure, and procedures.

What can an individual do who finds himself placed on a poorly managed committee? Should he resign; stay away from meetings? Or are here also methods of indirect leadership, of playing a supporting role? The field of group dynamics provides us with both rules and tools for sharing in group leadership, tools that enable the individual to work for the benefit of the group, including the leader or chairman. Group dynamics helps us to act in the interest of the group's task or purpose, not for self-aggrandizement nor with the intent of being divisive, but toward the goal of strengthening and unifying the group as a whole.

Often board and committee members are tired of just "sitting" at meetings and of leaving the preparation and follow-up on decisions to a chairperson. In accepting a motion (goal) the individual in a decision-making group must also accept a responsibility for the means of attaining that goal. This usually means making a commitment of time, effort, or money.[9] In other words, the individual must accept a *sharing of responsibility* and *participate in a cooperative effort*. The group member can influence others through example. He or she can ask for complete clarification regarding the detailed activities implied in the proposed decision and offer to assume responsibility for carrying out some part; other members may then follow suit. The member can also take the initiative in reporting back on the assignment or discuss problems encountered and advice needed in completing the task; this, in turn, will put the chairperson in the position of checking on progress of delegated work which should have been done in the first place. A group member can accept rather than refuse a specific assignment, de-

spite its relative unimportance, and put full effort into doing a quality job and setting an example to others of: "*Do*—not *talk*—democracy."

What could a highly qualified volunteer do when asked to help in getting out a mass mailing, repairing toys, or sitting at a reception desk—jobs that are usually rated as "unskilled"? It is a fact that such chores are definitely not utilizing the skills of the individual concerned, yet routine work sometimes can provide satisfaction when done with congenial teammates or undertaken in the spirit of fun or under emergency conditions. The lone volunteer left with a boring task may know that he or she is making a contribution and gain a certain degree of satisfaction through this knowledge, but the person whose potential abilities and skills are consistently not recognized nor used will become frustrated in the long run. Often a high rate of recruitment resolves into an equally high rate of "volunteer dropouts" and may be traced to this very lack of challenging assignments.

Consequently, highly qualified and already busy volunteers may be asked to perform tedious jobs and long shifts because of a serious shortage of volunteer personnel. The potential educational leader, in this case, could recruit an alternate or substitute for his or her own assignment and additional volunteers for the other jobs which need to be done. The potential leader could assist in orienting the new volunteers to the organization and in so doing become himself better informed and knowledgeable about the total program and personnel needs of the organization. Perhaps, too, there are special functions and activities the volunteer could attend and, thus, offer his or her services in an additional program.

What about a volunteer who has been asked to report for office aide work and finds that materials and supplies are not ready or that the hours assigned have been duplicated by another volunteer? Should he or she go home in disgust? Should he or she discuss personal feelings about the poor management of officers or staff with another disappointed volunteer? The volunteer should and need not do either of these things, but it takes patience, tact, and a practical kind of imagination, in addition to a strong commitment to the group's purpose, to offer some immediate concrete help in assembling the needed resources or in reconciling the overlapping time schedule.

The volunteers conquering the above situations will need to possess two characteristics in common: a strong personal commitment to improve a situation in trouble and an equally strong

conviction about the purpose and total program of their own group. Only then can they find out on their own what has been called "a major dimension of leadership"—the ability to learn from disappointments, frustrations, and failures, as well as from achievements in groups to which they belong.[10] This also implies that they possess another attribute of an educational leader: knowing how to judge organizational problems in terms of goals and values, rather than being critical of the mistakes made by persons in charge. The topic of evaluation is dealt with in the following chapter.

NOTES

[1]United Nations, *Social Progress Through Community Development* (New York: U.N. Bureau of Social Affairs, 1955).

[2]Kathyrn Oliphant, *Basic Provisional Course Outline* (New York: Association of Junior Leagues of America, 1961), pp. 51–52.

[3]Gertrude Landau, "Leadership Trends in Senior Centers," in National Council on Aging, *Second National Conference of Senior Centers* (New York: National Council on Aging, 1965).

[4]Helen M. Feeney, "Volunteer and Professional—The Role of Adult Education," in David B. Rauch, ed., *Priorities in Adult Education* (New York: Macmillan, 1972), p. 96.

[5]"A Bill of Rights for Volunteers," written by Mrs. Richard L. Sloss for the American Red Cross.

[6]Elizabeth M. Cantor and Margaret R. Pepper, "What About the Staff?" in *Voluntary Action Leadership*, Spring 1975, p. 10.

[7]Ibid., p. 15.

[8]See Chapter 5, "The Group Worker and Committees," in Alan F. Klein, *Society, Democracy and the Group* (New York: Woman's Press and W. Morrow, 1952).

[9]Roger Gray, "Problem Solving and Executiveship Can Improve Leadership," in *Adult Leadership*, June 1963, p. 42.

[10]Gordon L. Lippitt, "Elements of Leadership Growth," in *Leadership in Action* (Washington, D.C.: National Training Laboratories, National Education Association, 1961), p. 95.

CHAPTER

8

Evaluation of volunteer learning

> Evaluation of voluntary action is a major concern to administrators and to volunteers. Instead of evaluating people, methods are being devised to define desirable outcomes against which performance can be measured—not the person but the impact on clients, organizations, and the volunteers themselves. —HARRIET H. NAYLOR*

Evaluation of some kind, informal or formal, is the basis for any decision reached—that a training program shall be repeated or discontinued, shortened, lengthened, offered at an earlier or later date, under the same or different leadership. However, such decisions are not always reached on the basis of some systematic appraisal process which involves collecting evidence to show the extent to which objectives were reached, as well as analysis to indicate the reasons why this was so.

In a preceding chapter, evaluative judgment was noted as an inherent part of educational planning and programming, and as one of the important qualifications of educational leaders. In this sense, evaluation means using every opportunity to take a critical look at ourselves and our activities in order to discover the means for improving our educational efforts. Evaluation also precedes goal setting and planning, and requires special planning by individuals and groups.

* "Mobilizing the Efforts of Volunteers for a Just Society—Are They Effective?" at National Conference on Social Welfare, 1974, Cincinnati, Ohio.

WHY AND WHAT TO EVALUATE

This chapter is concerned with the question: How can the value of the total volunteer training and development program be assessed, from the point of view of the individual volunteer, the learning group, and the agency or organization?

This involves more than appraising specific group learning experiences in terms of attendance, participation, quality of teaching, carry-over into volunteer job performance, and morale. It also includes ongoing evaluation with individual volunteers and periodic assessment of the effectiveness of the total volunteer effort in the agency and community. This must be done cooperatively by those responsible for specific learning experiences: by the volunteers themselves, and by those with whom the volunteers work.

When the objectives are not specified, it is of course not possible to evaluate; i.e., "to draw out (or discover, find, determine) the value or worth of something by an active process."[1] A volnnteer training and development program may have different objectives from the viewpoint of the volunteer, the educational leader, and the agency or community group in which the volunteer functions. In order to assure maximum use of the results of the evaluation process, these different publics have a part in the evaluation process from planning to utilization.[2] For example, a course for Volunteer Friendly Visitors may be given by a local Council on Aging or Voluntary Action Center, and the volunteers placed with varions voluntary and public agencies serving the aging; to what extent is satisfactory volunteer activity the result of the training course, of careful selection and placement, of well-planned on-the-job help, or of opportunity for growth and advancement? What factors beyond the control of the individuals and groups concerned contribute to successes or difficulties and need to be taken into consideration in future planning? And concerning the training program itself: is it important to know what the participants knew and were able to do at the beginning and use this as the baseline against which to assess their knowledge, skills, and understanding at the end of the educational program? The following criteria include these different viewpoints.

Evaluation of Group Learning Experiences: Criteria

An educational program is of high quality when:

- attendance at training sessions is consistently high; training sessions or individual conferences are enjoyed; participation is active and thoughtful;

- there is a positive attitude toward further training and learning.

An educational program is effective when volunteers:

- demonstrate greater resourcefulness, imagination, initiative;
- show more enthusiasm and greater understanding;
- do more independent planning or more planning with, rather than for, people;
- conduct better group meetings which, in turn, are more enjoyed by the group members;
- stay longer in the organization;
- find and use more resources.

Evaluation of Group Learning Experiences by Volunteer Trainees

Many organizations habitually use some written forms at conferences, meetings, or training courses to get a general idea of how well the program was received. Often a comment form similar to the following is distributed.

END OF SESSION REACTION FORM

	(a)	(b)	(c)	(d)
1. Were you interested in this session:	Very much( )	Quite a bit( )	Some, but not much( )	Very little( )
2. Did you feel that most of the group was interested in the session?	Very much( )	Quite a bit( )	Some, but not much( )	Very little( )
3. Did you learn any new facts or get any new ideas?	Certainly did( )	Probably did( )	Maybe( )	Not at all( )
4. Was there enough opportunity for participation?	Too much( )	All that was needed( )	Should have been more( )	Should have been much more( )

5. What did you like best about the session?

6. What suggestions do you have for improving future sessions (content, techniques, materials, tempo, etc.)?

In order to assure some degree of validity, assistance on distribution and analysis of the form by the leaders of the program may be needed.

1. *Guidelines for Distributing the Forms to the Participants*

EXPLAIN the purpose of the evaluation in general and of this program in particular: *why* frank and honest answers are requested

and *how* the comments will be used in improving future sessions; *why* forms need not be signed; that this is an assessment of the value of the training or meeting for the participants and not criticism or praise for the trainer(s) or chairperson of the meeting. SET A TIME LIMIT: 5 to 7 minutes is probably adequate.

2. *Tabulation, Summarizing, and Analysis of Answers*

Answers to the multiple-choice questions need to be counted. For a very small group, a copy of the form itself could be used as a work sheet. However, this method does not allow for an analysis of the answers given by a particular individual and it is preferable to make up a work sheet such as this:

	Question 1				*Question 2*				
Student #	a	b	c	d	a	b	c	d	etc.
1	x					x			
2		x				x			
3			x			x			
4		x				x			
etc.									

Participants' forms can be numbered and the trainer can see whether a given individual (whether the name is known or not) always checks the middle column, or feels negative about all aspects of the training, etc.

As the answers are totaled, the trainer can see how the program as a whole is judged—on a normal distribution curve with a small number of very positive and very negative comments? Slanted toward the positive side, etc.?

Answers to the open-ended questions (#5 and #6) could be organized according to some categories; for example: comments regarding subject matter, teaching methods, size of group, materials given out, etc. Sometimes it is best to copy the answers on individual cards or slips of paper and develop categories by putting the items into logical piles. The items in each category then are counted again and the question must be asked: *What does it mean* when a given number of comments are made, for example, that over half of the group thinks the course was too short, or that no one has a concrete suggestion for improving future sessions?

All of these questions are particularly important for the leader

of the program itself—a president, program chairman, trainer, or discussion leader who wants ideas both for improving future meetings and for strengthening his or her own leadership. A board of directors, program or education committee, or an educational director, responsible for many programs need the participants' answers *and* the leader's analysis, explanation, and comments in planning future programs; in helping the leader strengthen his skill as a chairman or instructor; in deciding whether a future similar program should be handled by this leader or not; and how to improve on any logistics problems which may have been present.

This end-of-session reaction form is helpful in one-shot meetings of various kinds when there is little time for an evaluation by the participants, or when different groups attend similar programs with the same or different leader. For longer training programs, another form may be more suitable, and additional time should be allowed to have it filled in. (See "Course Evaluation Form.")

1. *Guidelines for Distributing the Form to the Participants*

Write title, dates, and goals (yours or those stated on the material from your Training Department) on the blackboard (or large piece of paper) for participants to copy on their forms.

EXPLAIN the purpose of evaluation in general and of this program in particular: *why* frank and honest answers are requested and *how* the comments will be used in improving future training sessions; *why* forms should or need not be signed; that this is an assessment of the value of the training for the group members and not criticism or praise for the trainer(s). SET A TIME LIMIT: 8 to 10 minutes is probably needed.

COURSE EVALUATION FORM

Title:

Dates:

Trainer:

The goals of the training event were:

1. What did you most hope to learn in this training event?

2. What did you actually fiud of most value?

3. What was least valuable or least interesting?

4. What specifics can be most easily applied in your own volunteer job?

5. How do you plan to continue learning what was started in this training?

6. Which sessions—if any—did you miss?

2. *Pointers for Perusal and Analysis of Answers by the Leader*

Are the answers to question 1 telling you anything new? Generally, did the participants expect from the training what you had hoped they would get?

Answers to questions 2 and 3: did some of the participants change their expectations in line with your goals and emphases? Answers to questions 4 and 5: on the whole, did the participants find the training helpful? Do you agree with them?

Answers to question 6: do participants with regular and irregular attendance react differently?

In view of the above, what changes in planning similar training events do you suggest? What strengths and weaknesses in your training do you note?

Some trainers have found it interesting to cut the forms and organize answers to each question accordingly to types of answers; for example, answers to questions 1–4 might have subheadings such as: general information about the organization, specific program activities or skills, exchange of ideas with other participants, certain teaching methods, etc.

If one wants to know later how an individual answered various questions, one must note the questionnaire numbers at every question before cutting the form into strips.

There are advantages and disadvantages in the use of these two types of forms. The second one (Course Evaluation Form) takes more time for the participant to fill in and for the leader to tabulate and evaluate. It is more difficult to categorize answers to open-ended questions. But from the point of view of the leaders, this kind of form—which can be adapted to many different situations—is also helpful in clarifying his or her own thinking. Question 5 may give an idea to consider taking another training program, doing some reading, or reviewing class notes as follow-up on the training sessions to which previously no thought had been given.

The next form crystalizes the learning experience for the participant to an even higher degree. It is suitable for use in various kinds of training programs, organizational or community wide. The authors have found it particularly suitable in conference training sponsored by national organizations for participants from state or local affiliates.

As a summary of this training, take _____ minutes to write:

A MEMO TO MYSELF

covering:

1. What are a few major learnings for use in my volunteer job—new ideas, suggestions, points of view, old ideas emphasized here, skills, attitudes, resources, etc.?
2. How I hope to use and share these—when, where, how, and with whom?
3. What are some important questions which I would have liked to see included or stressed more?

1. *Guidelines for Distributing the Form to the Participants*

EXPLAIN that this is indeed a memo to each one individually which should serve as a summary; that these forms will not be collected by you (the leader), but are for the future use of each person. Indicate that there might be a brief discussion on some aspects of this assignment, however.

DECIDE ON A TIME LIMIT and fill it in before giving out the forms; probably 7 to 10 minutes should be adequate.

Unless the group is very large, some persons might be willing to share some of their comments.

As answers to Question 1 are shared, the group will see that different members probably find very different things most helpful and most important for their volunteer job. The trainer has a golden opportunity to point out why this is so, especially in any group leadership training program.

Question 2 gets at the problem of transfer of learning in a concrete way; it may or may not be appropriate to share the answers.

Question 3 provides the leader with suggestions for future training programs; these answers might be written on the blackboard and discussed in more detail to find out how general the particular reaction is, to point out that this was (or was not) to be particularly emphasized and why, that it would have meant leaving out something else, etc.

2. *Summary and Analysis*

Since answers are not turned in to the trainer, he or she must record impressions or whatever discussion has taken place in connection with the "Memo to Myself" project after the session. This can provide the following information:

What did the group members who spoke up find most helpful and important? How many spoke up? Were their answers thoughtful, specific, varied, etc.? Were they in line with the leader's objectives and emphases? What content did the trainees miss; was this within the framework of the training?

Even the simplest discussion or summary of student comments provides an opportunity for the trainer to look critically at the training program and get help for future programs. This method is largely an aid in self-evaluation by the learner and less an objective instrument for assessing the quality of the teaching. Sometimes very unstructured comments by the participants are helpful in assessing the value of a learning experience. At the end of an extensive community service education program "co-sponsored by a local Junior League and a Community College," individual participants wrote comments.[3] Reflecting on the (content) unit on poverty, one student wrote, "Now we have more ideas of how poverty feels in the kitchen, dining room, stomach, and the mind. . . . Since planning and cooking took longer (during the experiment of living on a typical Aid to Dependent Children allotment) our minds were nearly constantly occupied with the thought of food . . . cheap food . . . trying for good nutrition . . .

on 50¢ a day. . . ." Commenting on the group dynamics labs, one participant said, "This exercise has taught me that I have much to learn in the area of really *listening* to what people are really saying to me." These and similar comments tell an instructor or sponsor more than what participants liked about the course, but indicate personal growth, self-awareness, and deeper understanding of a social problem.

Involving Course Participants in Designing a Course Evaluation Form

If students help set up a system and instrument for evaluating a learning experience, their interest in the process and result is likely to increase and lead to application in their own practice, as was demonstrated in a community-wide eight-session course "Administrative Leadership in Voluntary Community Organizations" initiated by a YWCA and co-sponsored by a community college and Social Planning Council. Leaders of such varied groups as PTA, League of Women Voters, Civic Music Association, Neighborhood Councils, Girl Scouts, League of Nursing, in addition to YWCA, participated. "In session six, brief mention was made of steps in planning evaluation of a meeting or series of meetings. The following principles were used: 1. There must be standards, criteria, objectives ("values") against which to assess the group experience. 2. Everyone must be assured that honesty and objectivity are expected and that constructive criticisms not generalities and conformity are expected. 3. There must be understanding of the purpose of the evaluation: Who wants to know it? Why? 4. What is going to be done with the information secured?

"The group members answering questions or making comments must be assured that something is going to be done with their criticisms, suggestions, and comments.

"The purpose and importance of this particular course evaluation were also discussed:

"What did the group want to know about the reactions of the participants and what did everyone want to say about it? What might the YWCA and the college expect from the comments?

"On the basis of this discussion the instructor and the YWCA Training Chairman developed a tentative questionnaire form for comments by the group in session seven which was then mimeographed for distribution at the next (last) session. All evaluations and comments from the participants gave evidence of great appreciation of this stimulating training experience."[4]

Evaluation of Learning After Some Application in Practice

A shortcoming of questionnaires, or other student comment forms used immediately upon completion of a learning experience, is "that the individual respondents may not be immediately aware of the full impact of the experience." Therefore, questionnaires were sent out to the participants in a Workshop for Directors of Volunteers three months later asking "for new developments in the administration of their volunteer programs, for expectations which the training had not fulfilled, and for suggestions for future training programs."[5] Comments may tend to be more thorough and practical, but, of course, a 100 percent return of answers is most unlikely. It may be those whose feelings were most positive, or most critical, about the program who will respond in writing. This problem is avoided by talking individually with volunteers.

Evaluation with Individual Volunteers

The following informal evaluation form can be used as a guide for a face-to-face conference after a volunteer has been on the job three to six months.

It will be helpful if the conference is conducted in comfortable surroundings and without interruption. The individual conducting the conference should maintain an objective attitude throughout the conversation, expressing neither approval nor disapproval. It is advisable not to write during the conference, but to complete the form as soon as possible afterwards.

It should be noted that these questions again are more or less "open-ended," leaving the volunteer wide latitude in giving opinions or feelings about the job, the training, and the help and direction received. Frank, candid answers are desired and this can be accomplished by a friendly atmosphere and a neutral attitude.

INTERIM CHECK-UP FORM

Prepared by:

NAME

POSITION

DATE

For:

VOLUNTEER'S NAME

POSITION

From To

(dates in current position)

1. When you first started as a _____, do you think you had a good idea of what you would be expected to do, and how much time it would take?

2. If *no* on the above question: What sort of things weren't you prepared for?

3. What kinds of help are you getting:
   —from your chairman or supervisor?
   (fill in appropriate title of person to whom the volunteer is accountable)

   —from the individual or persons concerned with training?

   —from other sources in the organization, if any?

   —on your own? How?

4. (a) To what extent have you received information and guidance from such aids as books, instructional manuals, kits or packets, audio-visuals, etc.? Have these been adequate? Too many? Too few?

   (b) What would you like to have in the way of *immediate* help? In the near future?

5. Further comments, if any. (Record any suggestions or opinions expressed, "clues" received, etc.)

Self-Evaluation by Volunteers

Similar periodic check-ups could also be handled by volunteers themselves. The following self-evaluation questions are suggested for volunteer leaders of groups for older people:[6]

- Are we really interested in working *with* older people rather than providing a program *for* them?
- Are we able to accept older people no matter what their handicap, difficulties, or unattractive traits?
- Do we ourselves really believe that older people have a place in the total pattern of community life?
- Are we comfortable in our relations with our own aged parents and relatives and not tempted to be a leader of other older people as a way of making up for the poor job we may have done in our own personal relationships with older people?
- Have we satisfying social relationships with groups comprised of our own age mates so that we will not need to depend on our relationships with older people to fill our emotional need for response and recognition?

Similar questions can be developed for volunteer group leaders of any age group and can also be used by supervisors in preparation for one-to-one informal evaluation interviews.

The Interviewer in Evaluation Conferences

Who should conduct such an interim evaluation interview? It may be: the person who originally recruited the volunteer, or the director or chairperson responsible for supervision of the work; maybe the president, or chairperson of volunteer activities; or a staff member, either a director or a coordinator of volunteers or the staff member who works most directly with the volunteer.

An individual conference comparable to an employee exit interview is particularly important when the volunteer is giving up the post for any reason—leaving town, end of a term of office, resignation for personal reasons, or not being reappointed or reassigned because his or her services are no longer desired or needed. Especially in the latter situation, hard feelings and unfavorable public relations can be reduced if both viewpoints are heard and put on record.

In the use of such record, two principles must be followed: that of sharing relevant information with those directly concerned, and that of confidentiality; personnel records must be handled carefully and serve the best interests of the agency and the individual.

Volunteer Evaluation and Recognition

It is possible that many informal "interim checkups" have taken place and there does not seem to be any problem. Nevertheless, some more comprehensive and more official—though informally handled—conversation is extremely important, especially if the

organization has a formal recognition program for volunteers at regular times. Expression of appreciation should be individualized and personalized; a token of appreciation or an official recognition at a public meeting will be much more meaningful if an evaluation discussion has taken place, and if the volunteer knows that not only the hours of service or years of membership, but the particular contributions are known and appreciated. Leaders in the field of volunteering are in agreement that recognition is an important part of the volunteer program in an agency or organization, and that it should be based on an evaluation of the performance of the individual. ". . . the greatest recognition comes from the feeling that you are doing something important, that you are a part of the team, that what you are doing means something . . . people don't want to feel that they are taken for granted, they want to know that their being there has made a difference . . . if you pat someone on the back it can't be phony, must be appropriate . . . certificates without some kind of on-the-job recognition mean nothing. . . ."[7] "Recognition means that someone cares, someone sees the difference an individual makes. Recognition builds the self-confidence of the person, therefore, making him/her happier with himself/herself and thus, more able to do a productive, caring volunteer job."[8]

Trainer Evaluation

In many agencies and organizations, assessment of the effectiveness of a volunteer staff instructor or trainer is mostly self-evaluation, using a summary of student comment forms and discussions with group members as an aid. Some groups have standards and procedures for selecting trainers (see Chapter 7) and, therefore, need some additional means for evaluating their current work and their continuous learning on the job.

One tool for collecting comparable information about members of a volunteer trainer corps might be the use of situational tests such as the following:

1. In the last session of a leadership course, one of the two trainers gave erroneous information on organizational policies and procedures to a large group. The colleague did not want to cause embarrassment by making corrections in front of the group and said nothing.

Do you think the colleague was right?

yes ( ) no ( ) depends ( )

I think so because

2. In a session on committee management, the group had many questions on the program and structure of the total organization and wanted to discuss these topics further. This meant leaving out, or drastically shortening, the areas of agenda planning and chairing meetings, which were scheduled as the main content of the session. The trainer changed the plan and went along with the group's interest.

Do you think the trainer was right?
yes ( ) no ( ) depends ( )
I think so because

Such situations must be selected so that there is no clear-cut answer; the supervisor or administrator must judge by the rationale given in the explanation whether the aspects of individual and group learning, of content and method of presentation, were all considered. The follow-up could be on an individual or group basis, helping these trainers increase their understanding and skill in regard to discussion leadership, group learning processes, flexible handling of subject matter within the framework of the session purpose, and other trainer problems apparent in the "tests." Both testing and follow-up should be done in a friendly, informal manner which does not pose a threat to the individual, but is a step in the process of educational supervision.

A more systematic approach to assessing the volunteer program through both group and individual inquiries is sometimes appropriate for a large organization such as a hospital, institution, welfare department, or youth organization working with many volunteers.

Making a Comprehensive Survey of a Volunteer Program

A survey of the volunteer program can be undertaken by a regular or special committee on volunteer personnel when a new or extended recruitment or training program is being considered, or when such problems as a large volunteer turnover or extensive criticism of training programs call for an explanation and new approaches to action. A comprehensive self-study of an agency's volunteer program should use materials and methods of evaluation which do not only produce the needed facts, but are valuable as an educational process for the participants and sponsors. This requires careful planning and interpretation from the start by the committee or task force in charge. (Such a planning group could

also secure the help of an outside consultant, for actual advisory help and often for prestige reasons.)

The purpose of the survey should be clearly stated and widely interpreted, for example, in a letter from the president which might state:

The PURPOSE of this survey of types of services rendered by volunteers in all units, departments, committees, and special projects is to find out:

1. How to *strengthen* current volunteer activity through
   - recruitment of additional qualified volunteers,
   - clarification of practices and procedures pertaining to recruitment, placement, supervision, evaluation, and recognition procedures,
   - orientation, training, and other helps to individual volunteers or groups;
2. How to *expand* current volunteer activity under the present setup;
3. How to *plan new areas* in the program where volunteers could serve.

It is advisable that survey materials have heen pretested, even if they are very simple forms.

One or more of the following materials could be used:

1. A *questionnaire* sent to all or to a sample of volunteers. Anonymity is essential. Questions could be multiple choices with optional comments and some open-ended ones, such as:

- Check which activities are involved in your volunteer position or service:

advising ____
follow-up on meetings ____
handling funds ____
handling the public ____
interviewing ____
keeping records ____
participating in activity, discussion, or decision making ____
planning ____
presiding ____
public speaking ____
reading materials, notes, minutes ____
reporting ____
representing another group ____
preparing materials (art work, visual aids, etc.)
supervising others ____
taking notes or minutes ____
teaching ____
telephoning ____
writing correspondence or materials ____
other (list):

- How much time (approximately) do you spend on volunteer activities altogether (including time spent at home (phone!) or elsewhere)?
  less than ½ day a week ____ ½ day a week____
  1 day a week____ 1½ day a week____
  2 or more days a week____ other____ (specify)
- What is your present volunteer position?
- Describe the kind of training you have received for this position to date?

  How helpful was it?
  very helpful ( ) somewhat helpful ( ) insufficient ( )
- Describe the help on the job you are receiving.

  How helpful is it?
  very helpful ( ) somewhat helpful ( ) insufficient ( )
- What general ideas do you have about the place of volunteers in this organization?
  Do they have
  too much____
  too little____ responsibility?
  just enough____
  Please explain:

  Do they get
  too much____
  too little____ training and other help?
  just enough____
  Please explain:

  Do they get
  too much____
  too little____ recognition?
  just enough____
  Please explain:
- Other comments regarding improvement of present setup or training for currently active and recruitment of additional volunteers:

2. *Interviews* of volunteers—program and decision makers on a random or stratified sample basis. Interviewees must be assured that their remarks will be treated confidentially. Interviewers must

be carefully briefed and provided with a form either with specific questions or with an outline of questions, such as these:

- Examples of activities done as a volunteer in this organization:
- Which of these is your most important contribution to the organization? Why?
- Which of these is most satisfying? Why?
- Which, if any, would you prefer decreasing or eliminating?
- Which, if any, would you like to do more frequently or more thoroughly?
- Timewise, do you think you give
  too much____
  too little____ of your time to volunteer service?
  just enough____
  (Explain)

- How do you keep up-to-date about changing needs and trends in the organization?

3. *A group interview* at a committee meeting could provide important information about committee management; it should not be conducted by the committee chairperson but by an outsider. It should be brief and attempt to get answers and general reactions to specific questions, not discuss the items in great detail or depth.

4. *Group discussion* with a committee or council group. Such discussion can be of the "brainstorming" kind, the object being to collect as many different constructive ideas as possible on a topic such as "How can the volunteers in this organization get more help" or "How can we make volunteer service more enjoyable and worthwhile?" Or the discussion could be more structured and based on such questions as:

a. What is the function of this committee, council, branch, unit, board, etc.?
b. What are the responsibilities of:
   (1) every member?
   (2) some members only, such as chairmen of sub or special committees, secretary, etc.
   (3) the chairman? the vice-chairman (if any)?
c. In what ways could the volunteer program help strengthen the effectiveness of the committee or other group and/or the competence and satisfaction of the group members?

This kind of group discussion particularly is a learning experience in itself for the participants and the leader.

5. Staff members should be involved in an evaluation of the volunteer program, not only as part of a special survey, but on a regular, periodic basis. A questionnaire might be helpful.[9]

In order to maximize the educational value of a survey—regardless of the methods of fact finding used—there should be reporting back to those who helped provide the information. In one organization the findings were organized in the form of excerpts from the answers according to these headings:

Volunteers say that volunteer work gives one

- a sense of participation in a challenging vital service
- a working fellowship with other volunteers
- a working partnership with staff
- personal growth and development

Volunteers want

- meaningful jobs
- utilization of skills and experience
- a clear statement of the amount of responsibility, help available, and time involved
- clarification of purpose and function of committees and other groups in the organization with which they are affiliated
- a feeling that their opinion counts
- to be prepared and kept up-to-date

As stated in Chapter 3, the educational program for volunteers must be part of a total effort by the agency to strengthen the activities of the volunteer in those aspects revealed as weaknesses in the survey. One frequently found problem area is that of evaluating volunteer-staff relationships. The following cases may help in this evaluation process.

Evaluation of Volunteer-Staff Relations: Three Case Studies

CASE A

Pinchhitting by Staff—the Absentee Volunteer

Program service volunteers are not doing jobs which should be done by employed staff—they do not take the place of a paid worker. In fields such as fund raising, health and welfare service,

and office help, the volunteers may work with, for, and under the supervision of a staff member who is responsible for their job performance. Sometimes it is difficult for both parties to establish and maintain the cooperative relationship and the respect for each other's part in the enterprise which has been emphasized throughout this book. The volunteer knows, and the staff member realizes, that the assignment must be as interesting and meaningful as possible and fill a real need rather than being busy work. At the same time, they both know that the volunteer does not *have* to do the work, and that emergencies in his or her personal or business life may necessitate absences, hopefully with at least some *advance* notice.

There may be illness in the family keeping the mother at home who was going to address an important mailing at the TB and Health Association or United Fund office; or an unexpected business trip which makes it impossible for the fund drive chairman to preside or speak at the campaign kickoff luncheon. The flowers on the hospital ward must be taken care of even if today's candystriper volunteer is absent for some justifiable reason; reluctantly, the orderly or paid nurse's aide adds the care of the flowers or pushing the library cart to his or her already busy shift and complains to the supervisor about unreliable volunteers. The executive of the fund drive telephones around for a substitute chairperson or speaker and other work piles up, even if he or she is successful in finding a volunteer who, furthermore, needs briefing, materials, and other help. At the office, the remaining volunteers or office staff members try to get the mailing out in time, possibly griping about the additional burden and not knowing or appreciating that it was a real emergency which kept the volunteer away.

The effect of this—necessary—pinch-hitting on the human relations between volunteers or volunteers and staff is the core problem in these examples. There is no plan for an office temporary or part-time nurse's aide who can be called on when a paid staff member is absent because of illness, and no plan for an assistant director to take over for an executive during his absence.

Possible Points for Discussion: Under what conditions could the organization arrange for a stand-by without making him or her and the regular volunteer feel not needed or not trusted? What interpretation must be given to all concerned, including the office force? How can the work be rearranged without expressed or implied criticism of the absent volunteer?

CASE B

The Expert as a Committee Member

It has been pointed out frequently in this book that business and professional people, still working or retired, are increasingly available and active as volunteers in a variety of voluntary enterprises. A special difficulty in volunteer-volunteer and volunteer-staff relationships can arise when the high-power executive serves on a committee with a lay chairman. This kind of volunteer is used to prompt action and sometimes unaware of the slow planning process in voluntary and governmental groups. The reasons for including those involved in carrying out a decision in the decision-making process—sometimes in regard to operational details which might be handled through executive directive—causes impatience, frustration, and doubt in the "efficiency" of the voluntary organization. The organizational leadership, even the staff advisor, on the other side, may be so impressed with the "businesslike" approach of such a volunteer that matters are handled by executive action which should have been referred to various groups in the organization for deliberation and interpretation. Other volunteers on the same board or committee with an "expert" in some field begin turning to him to see how he may be voting on all sorts of issues which are within or outside his occupational competence. The lay chairman of the committee feels more and more inadequate in giving leadership to the group and is less and less able to achieve active participation from *all* the members.

Questions for Consideration: What kind of help should the "expert" be given in learning to understand his role as a member of a volunteer group? How can a chairman learn to utilize the special contribution of experts without neglecting the common-sense layman's point of view? How can the staff advisor help?

CASE C

Rubber Stamp or Real Decision Making

In large and small organizations board and committees nowadays have to deal with more and more complex issues and problems. The agenda gets longer, the group members get impatient, and the chairman is torn between limiting debate and not getting the necessary decisions made before it is time to adjourn the meeting. Enter the experts—either a subcommittee or task force, which has

studied the situation thoroughly (or thinks it has done so), or an individual—staff member or outside consultant. A detailed plan for action is presented with competence and conviction (and sometimes using many technical terms) and the board or committee is asked to approve the plan. Very few questions are brought up at the meeting because the committee members are shy in the presence of the expert and do not wish to reveal any indication of ignorance; the proposal sounds convincing; one does not wish to question the judgment of a study committee; everyone else seems to be in favor of the proposal; the agenda has many other items which must be covered. So the recommendation is approved and the chairman thinks to himself or says to the staff advisor, "Wasn't this a good meeting; it went exactly as we had planned; they approved the proposal without any objections!" Maybe he adds: "How good that Mr. Smith or Mrs. Brown were absent; there would have been a lengthy discussion, counterproposals or amendments, and maybe no unanimous decision." After several such meetings, some volunteer committee members will arrive late, leave early, or stay away altogether with the justified complaint that the meetings are just routine, uninteresting, require "just listening to reports and approving recommendations and involve no real decision making."

Discussion Questions: How can a chairperson plan for problem solving at meetings even if the issue is complicated? How can he or she make sure that the agenda and supportive material are mailed to the members ahead of time and read? Are there situations where one solution is the only possible one and it would be a complete waste of time to think up alternatives? How can the committee or board agenda be planned so that there is a variety of topics—some requiring thorough discussion from various angles, others action on recommendations? What is the staff role?

Educational Implications

These situations, as stated before, involve more than a personality conflict between volunteers or volunteer and staff people. Three principles must be considered in handling the problem:

1. Respect for the individual(s) must be maintained: even a very ineffective volunteer is entitled to it.
2. A problem-solving approach must be used; alternative solutions and approaches must be considered from the point of view of the individual and the agency.

3. Educational help—consultation and training—must be provided for both the volunteer and the professional worker or volunteer leader representing the side of the organization.

It should be noted that the curricula in most professional schools in the health, welfare, recreation, and education fields do not include, much, if anything, on professional-volunteer relationships; agencies or organizations themselves have to include this topic in the orientation and in-service training programs for their staff members. Staff supervisors, therefore, must be aware of the feelings of staff toward volunteers—the threat which a highly qualified and able volunteer can mean to a new or not so new professional; the slight resentment about the public recognition which the volunteer receives after the professional has helped him or her to do the job; the disappointment and frustration over the few unreliable and unqualified volunteers who require more professional effort and time than the many enthusiastic and competent people; the slight concern about the integrity of a volunteer in handling confidential personnel matters without having had the benefit of intensive graduate study in the field. The development of a regular course or short-term program on "working with volunteers" designed for staff members from many disciplines and for their volunteer partners might be a valuable undertaking for a community college or other center of continuing education.

Guidelines for Evaluation by Individuals and Organizations

As a recapitulation, here are twelve guidelines for evaluating volunteer training and development programs in community groups.

By Volunteer Participants

1. Individual learning plans and group learning experiences should be developed with a clear statement of purpose, considering the volunteers' needs and interests within the purpose and goals of the organization.
2. Opportunity for evaluation by and with the volunteers, individually and in learning or task groups, should be provided, using purposes and goals as criteria.
3. Volunteers should be helped to look at their learning experience in regard to their position or job.
4. Volunteers should be helped to look at a particular learning experience as part of their continuous learning plan.

By Educational Leaders

5. Trainers and other educational leaders should be given the freedom to set specific learning goals for and with the participants within the framework of the organization's goals and activities.

6. Trainers and other educational leaders should be encouraged and helped to use a variety of formal and informal methods for appraising the effectiveness of individual and group learning experiences.

7. Trainers and other educational leaders should be helped to analyze and assess the formal and informal comments made by the participants in small and large group sessions.

8. Trainers and other educational leaders should be encouraged and helped to evaluate and strengthen their own effectiveness as adult educators.

By Administrative Leaders and Organizations

9. The administrative planners should consider evaluations by volunteers and educational leaders of volunteers in developing goals and plans for the volunteer program.

10. Administrative leaders should interpret the purpose, methods, and uses of evaluation as a means of increasing the quality and scope of volunteer training and development programs.

11. All volunteers and volunteer leaders should feel convinced that their thinking is honestly desired and will be carefully considered, not ignored.

12. Throughout the agency, there should be a growing interest and enthusiasm for volunteer education and development and a sense of freedom to submit constructive criticisms and innovative ideas to help both the individual volunteer and the organization grow and change in response to ever changing community needs.

NOTES

[1] David Horton Smith, *Evaluating Voluntary Action* (Washington, D.C.: Center for Voluntary Society, Occasional Paper No. 3, 1972).

[2] Carol H. Weiss, "Alternative Models of Program Evaluation," *Social Work*, Vol. 19, No. 6, November 1974, p. 675.

[3] Jim Rogers and Ralph Wahrer, "A Six Month Experience in Education of Adults," *Adult Leadership*, Vol. 19, No. 7, January 1971, p. 221.

[4] Beulah M. Edgett and Anne K. Stenzel, "An Inter-Agency Approach in Training Volunteers," *Adult Leadership*, December 1963, p. 168.

[5] Tessie B. Okin and Carolyn K. Wiener, *Planning, Implementing, Evaluating a Workshop for Directors of Volunteers* (Washington, D.C.: National Center for Voluntary Action, 1973).

[6] Florence E. Vickery, *How to Work with Older People—A Guide for Professional and Volunteer Leaders of Social Activity Programs for Older People* (Sacramento, Calif.: Division of Recreation, State of California, 1960), p. 38.

[7] NCVA Clearinghouse, *Volunteer Recognition* notebook. Publication No. 23, January 1973, p. 25.

[8] Ibid., p. 20.

[9] See Ivan H. Scheier, *Orienting Staff to Volunteers* (Boulder, Colorado: National Information Center on Voluntarism, Inc., November 1972), p. 21.

CHAPTER
9

Outlook for volunteer training and development

> The Challenge of Volunteering is first of all to extend the concept of public involvement to more people. Any new volunteer initiative in America that was purely elitist in its concept would not work because we won't soon back away from the notion of wide citizen participation, of participatory democracy. —DOUGLASS CATER*

In this manual the authors have made some assumptions about the need for more commitment to and understanding of the purpose and programs of voluntary organizations and community agencies to which volunteers give their services. We also stressed that more utilization of the interest, skills, and potential of the volunteer is needed in order to assure benefits to both, the community program and the individual.

Looking about the world of today and the trends for the future, these assumptions appear to be even more pertinent than ever before. If our democracy is to endure, will it be enough for individual citizens to participate in a political campaign, elect to office, and pay taxes? Are there not more significant roles for individuals to learn and to practice? Governmental officials, elected or appointed, directors of a corporation or foundation, chairpersons of voluntary organizations or semigovernmental committees, all carry responsibility for the fulfilling of a public trust. The community

*Keynote Speaker at Conference: *Voluntarism and America's Future—Prelude to the Third Century* (Washington, D.C., January 16–19, 1972).

must hold its leadership accountable for the proper execution of their respective duties. The overseeing of public responsibility is the duty of every adult who must ask for a reckoning on how tax money is spent, how and what services are delivered, and the standard of performance or workmanship of public officials and community leaders in whatever capacity.

Herein lies an educational implication and one in which the volunteer movement can well perform. The rapid expansion of governmental activity in the solution of social problems increases rather than diminishes the responsibility of voluntary groups and individuals for meaningful and active participation. There is a deep sense of commitment on the part of public service and social action volunteers today, but frustration and resentment will result if this sense of commitment becomes diluted by procedural constraints and bureaucratic controls.

Many individuals and many groups can assist in giving guidance and direction in the task of diagnosing and initiating community action and in providing programs and services that will assure genuine involvement and participation. Leadership will continue to be needed on all levels to implement equality of education, better housing, improved social services and medical care, conservation of natural resources, and leisure-time activities. But any organized effort to accomplish these tasks must include plans for sharing responsibility, for seeking opinions, and for involving those affected by the results of a decision. This means that voluntary associations must have representation of the recipients of their service on their boards and involve them in policy making in a participatory rather than procedural manner. It means taking seriously the provision of Title 20 of the Social Security Act which gives new opportunities for citizens and citizen organizations for sharing actively in the planning process for social services in their states so they fit the needs of people in local communities, not a federal model.[1] In other words, "rather than centralizing citizen activity so it functions under an elite hierarchy, organizations should be defined and led primarily by the people themselves. . . ."[2] Genuine representation of constituent groups to whom the representatives are accountable—whether teen-agers on a Girl Scout Council board of directors representing their "Girls Congress" with upper (Senior High) and lower (Junior High) "Houses," or members of Citizen Advisory Councils to a County Department of Social Services representing Senior Citizen groups, Welfare Rights Organization, and clients from agencies serving the

handicapped, ethnic minorities, military families—such client or membership representation should and can be more than "tokenism." This assumes that there is educational leadership making the representation an effective antidote to the growing impersonalization of human life in general and the human services in particular.

Grassroots voluntary groups continue to spring up, functioning with a minimum of organization and maximum of participation, often initiated by people who either needed or found the specific kind of service. The Seventh Step Foundation is a national organization for prison inmates and ex-convicts interested in people reform, not penal reform. Volunteer counselors meet with prison inmates for weekly rap sessions not open to attendance by prison guards; other volunteers provide transportation for inmates' wives and children who otherwise could not visit the prisoners and assist ex-convicts in finding jobs. The Fortune Society in New York has a similar program and publishes a monthly *Fortune News.*

A toll-free telephone service for runaway youth was started in Texas and extended into at least 37 states. It is staffed by volunteers, including some grateful rnnaways who have returned home.

FISH* is a world-wide volunteer organization devoid of red tape and administrative cost. Each chapter is independent and operates within the community without a controlling national or international body and with expense only for postage and telephone service. If a volunteer provides transportation, he pays for his own gas; other services include temporary help with cooking or housekeeping, babysitting or companionship for the elderly. In order to avoid duplication of services and to utilize professional help when needed, referral to existing services is provided by this international group.

And then there is a 74-year-old businessman and civic leader wbose typical day might be "to counsel a small businessman as a representative for the Service Corps of Retired Executives, attend a United Way Committee conference, do some promotional work for the Chamber of Commerce, and chair a Council on Aging meeting. The next day he might serve in his advisory position with the Motor Club, take part in church or Boy Scout activities, or act in his role as chairman of the Linn County Senior Citizen Transportation Committee. 'I like people and have always enjoyed everything I've done to do some good in the community. I don't bowl,

*The group's symbol, the fish, is the same one that secretly was used by early Christians during centuries of persecution to identify themselves to each other.

golf, fish, or hunt. My hobby is working with people. . . . We all owe *civic rent* (our italics) and I've always liked to be a rent payer.'"[3] His female counterpart calls community work "a citizen's duty" and has made "volunteer service in virtually every area of community affairs" a career. She holds office in the Junior League, is a board member of neighborhood centers, Home for Aged Women, Hospital Auxiliary, and the National Institute of Social Science. She believes a volunteer "has a vital watchdog role and is able to combat what she feels is a lack of accountability in big government."[4]

Is this kind of volunteer activity not citizen participation, but the kind of service-oriented voluntarism so severely criticized by some women's groups? We certainly think NOT, and have emphasized throughout this book our agreement with the conclusion reached at a recent conference on Volunteering that "to make a distinction between the service and change-oriented volunteer . . . (is) no longer useful since . . . every volunteer has the potential to create change even on a one to one basis."[5]

The participants at this conference—individually, not as representatives of a variety of organizations—agreed that in order to achieve for volunteers "the power, personal growth, and development to which they are entitled," a number of specific recommendations need to be implemented. We concur that research is needed on "the effects of voluntarism on roles and status of men and women . . . the impact of volunteering on paid work opportunities . . . and the cost of a volunteer program"[6] in dollars and staff time. Also, "ethnographic studies of the diverse worlds encountered in volunteer work . . . would reveal the existence of a power elite in volunteerism, a group of women who exert considerable influence in their communities and perhaps in the larger society."[7]

We also concur with many of the items of the "Volunteer Bill of Rights" proclaimed by the conference asking for

- a variety of options for volunteer involvement recognizing every form of citizen participation and the need for recipient satisfaction;
- Utilization of special skills;
- Involvement in policy and decision making with recognition of the volunteer as an agent of change;
- Recognition and acceptance of the impact and potential of voluntary services and action through research (as noted above), education regarding volunteerism from elementary through graduate school."[8]

We disagree, however, with the proceduralizing and institutionalizing of volunteering implied in some other parts of the proclamation and promoted elsewhere:

- The notion of development as "upward mobility" within a career ladder from unpaid volunteer to paid employee. In fact, a skilled volunteer can make his or her contribution on a highly specialized, professional level; it is not competence and ability which distinguishes volunteer and professional workers;
- The materialistic rather than basically altruistic incentive as another aspect of "upward mobility." Voluntarism must remain outside the merit and status value system of our competitive society as a free and creative enterprise;
- The formalizing of relationships, working conditions, and other benefits as specified, for example, in the model "contract" for the "volunteer professional."[9]

We believe that cooperation, teamwork, partnership depend more on the attitudes and actions of people than in cut and dried rules and procedures. If an agency's social climate is people-oriented rather than only job- and task-oriented, volunteers *will* have the opportunity to grow and develop in confidence, competence, and satisfaction; appreciated, respected, and enjoyed by their paid colleagues—naturally and *voluntarily*, not because of prescribed policies. "The nice thing about volunteering is that you can try different things to see whether you like them; you don't have to make a lifetime commitment. I want to try other fields because the more I do, the more opportunities I find," said a 32-year-old bachelor who finds happiness as leader of both a Brownie Girl Scout and a Webelo Cub Scout troop.[10]

There are some other important issues under consideration within today's volunteer movement, also related to the question of volunteer recognition.

Should universities and colleges provide credit for volunteer work of students and under what conditions? Many academic programs, not only in the helping professions but in law, political science, and business, have expanded their curricula from the classroom into all kinds of experiential learning experiences and internships in the community, often in volunteer situations. Does granting academic credit imply more than practical volunteer experience such as some "academic" activity—library study, written reports, or evaluation on the evidence based on what was *learned*, not only on what was *done*, as described in Chapter 5. On the other

hand, ACTION's University Year for Action gives students both academic credit and stipends similar to other ACTION volunteer programs for a year's off-campus social work in some antipoverty program. Is a field supervisor's reference sufficient for credit in this case?

A related issue is that under study by the Task Force on Volunteer Accreditation of the Council of National Organizations for Adult Education. Women, for example, who did not complete their college or graduate education, or interrupted their careers before marriage, plus men and women who are changing careers for many reasons, may have acquired knowledge, skills, and understanding in volunteer work closely related to their new field of endeavor. The Educational Testing Service in Princeton, New Jersey, and representatives from a number of national organizations with diversified volunteer programs have begun to analyze carefully the competencies acquired for example by a volunteer researcher or advocate/lobbyist in the League of Women Voters, a group leader for a Volunteer Youth Organization, an advisor/counselor or educator/trainer. Credit might be given for a specified number of years in a position with full responsibility, not in an assistant or apprentice role.

What kind of record keeping by the agency and individual might be necessary? Would a test-out procedure of individuals be justified? Would volunteer agencies need to be accredited or certified for such transfer programs? How would tbe volunteer's *training*, not only service, in the agency be evaluated, especially if an individualized continuous education program as described in this book is an integral part of the agency's volunteer program?

We think there are many challenges ahead for the volunteer movement in this country and abroad. In 1976, the third conference of the International Association for Volunteer Education (IAVE) will meet in San Francisco witb the official title "Learn Through International Volunteer Effort" (LIVE); 80 countries are expected to be represented and will share their volunteer training experiences in the fields of health, welfare, education, recreation, and culture. Meanwhile, Alexis de Tocqueville, whom we quoted earlier in the book, and the Bicentennial, remind us of volunteering in the American tradition as a privilege and a responsibility.

The authors have endeavored to provide some simple and tested methods and techniques for strengthening volunteer participation —individually and in groups. For those individuals and organizations choosing to *work and learn* in partnership with each other for the

achievement of social responsibility, the rewards will be great and lasting. The history of totalitarian governments bears witness to the demise of voluntary groups and to the strangulation of individual responsibility. Nonparticipation breeds apathy and indifference. As Lindeman has said, "The habit of participation is the most precious possession of democracy's citizens."[11] There can be no greater challenge to the volunteer movement today and tomorrow.

NOTES

[1] U.S. Department of HEW, *A Citizen's Handbook—Social Services—75*, Washington: SRS 75-23038.

[2] Lori Nizzi Benz, "Citizen Participation Reconsidered," *Social Work*, Vol. 20, No. 2, March 1975, p. 114.

[3] *Cedar Rapids Gazette*, January 28, 1975.

[4] *Park East*, Vol. 12, No. 22, June 5, 1975.

[5] *Voluntary Action News*, Vol. 5, No. 6, November–December 1974, p. 6.

[6] Ibid.

[7] Arlene Kaplan Daniels, *A Survey of Research Concerns on Women's Issues* (Washington, D.C.: Association of American Colleges, May 1975).

[8] *Voluntary Action News*, Vol. 5, No. 6, November–December 1974, p. 6.

[9] *The Volunteer Professional—What You Need to Know* (New York: Volunteer Professional Consultants; Straus Communications, 1972).

[10] "The Bachelor and the Brownies," *Voluntary Action News*, Vol. 5, No. 6, November–December 1974, p. 5.

[11] T.V. Smith and Eduard C. Lindeman, *The Democratic Way of Life* (New York: Mentor Books, 1951), p. 151.

Appendices

Appendix 1

Volunteer Jobs

Descriptions and Training for Decision-making Volunteers

Descriptions and Training for Program and Service Volunteers

Appendix 2

Staff Roles in Working with Volunteers

Appendix 3

Training Programs and Outlines

Appendix 4

Training Methods and Techniques

Appendix 5

Sample Forms, Guides, Charts

Appendix 6

List of Cast Situations

Selected References

(In Addition to Chapter Notes)

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