ROLE REVIEW

BY PROPERLY DEFINING AND NEGOTIATING ROLE RESPONSIBILITIES, STAFF AND VOLUNTEER LEADERS CAN FORM A MUTUALLY BENEFICIAL PARTNERSHIP.

By Michael J. Marx, Ph.D.

MANAGEMENT THEORISTS HAVE KNOWN FOR years that role ambiguity decreases individual performance and increases job stress. To avoid these outcomes, organizations need to specify, in written terms, exactly what they expect from their employees. Volunteer organizations are no exception. Staff and volunteers need to have a clear understanding of their individual and mutual job responsibilities. Those who have leadership roles and work in tandem, recruit, place and orient new volunteers. They prepare, conduct, and follow up meetings in which decisions are made, goals set, strategies developed, and actions taken. Their success depends upon how effectively they work together to manage other volunteers. This, in turn, depends upon how well they have defined and negotiated their role responsibilities.

In a recent needs assessment, volunteer and staff leaders from a large human service organization were asked to list the major barriers to effective volunteer leadership in their organization. Nearly all reported that the volunteer-staff partnership was ill-defined. Volunteer leaders reported uncertainties about what was expected of them, the procedures they should follow for taking action, and the extent and limit of their authority. Staff leaders echoed many of these same uncertainties. Both groups acknowledged talking about their mutual responsibilities. Some even had job descriptions. However, grey areas still existed and problems often arose during the year over who should (or should not) perform certain tasks. The underlying reason for these problems was that volunteer and staff leaders rarely defined and negotiated their respective role responsibilities in a collaborative and systematic manner.

In the long run, clearly defining the nature of volunteer-staff partnerships can prevent a lot of aggravation. It can also increase an individual's accountability, since opportunities are given to define the leadership role he or she is most able and motivated to enact.

The following is a step-by-step procedure to assist leaders in properly defining and negotiating their role responsibilities. It requires two persons, e.g., a volunteer chairperson and staff director, who share responsibility for managing volunteer programs, to hammer out cooperatively a firm definition of their respective job duties.

STEP 1

Set a Time and Place to Meet Together

There are two things to remember when making an appointment to define and negotiate roles. First, arrange to meet when you both have plenty of time to devote to the process. Allow two hours, or more, if possible. In this way, the discussion can continue until it reaches a natural conclusion or break. It is disconcerting to reach a critical point in a negotiation and have to leave for another appointment; especially if one is unable to arrange another meeting in the very near future.

Second, plan to meet on neutral ground. A conference room in the office building of one of the parties may be fine, but either of their private offices may not be. Meeting on one person's turf can create the illusion of superior power as one person sits in an executive chair behind a large desk, surrounded by symbols of achievement and authority. Meeting on neutral ground has an equalizing effect. It mitigates the common tendency of one person to act in a domineering manner and the other to respond submissively, a communication pattern not necessarily conducive to a healthy partnership.

STEP 2

Update and Distribute Task-Specific Job Descriptions

A job description usually includes major areas of responsibility, skills required, and time involved for a particular position. A "task-specific" job description goes a step further. It lists the major tasks involved in each responsibility area. For example, the Public Education Chairperson, a volunteer, may be responsible for preparing committee meetings. This could involve several major tasks: (1) selecting the date, place and time of the meeting, (2) preparing the agenda, (3) inviting other volunteer or community members to the meeting, (4) calling members to confirm their attendance. The Public Education Director, a staff person, may be responsible for providing administrative support when preparing committee meetings. This could involve: (1) scheduling the meeting on the activities and facilities calendars, (2) arranging parking and delivery of box lunches, (3) sending a notice of the meeting and copy of the agenda to members, (4) inviting other staff members when appropriate, (5) arranging for any special presentations, e.g., films, videotapes, speakers, etc; (6) arranging for any equipment that is necessary.

One of the major reasons for uncertainties in volunteer and staff leaders' role is the failure to write task-specific job descriptions. Most leaders are content with a listing of overall responsibilities. Yet, it is easy to see in the previous example of meeting preparation how a lack of task specificity could cause confusion. The Public Education Director might reasonably expect the Public Education Chairperson to instruct the company secretary to type and mail the agenda unless this is otherwise written in the job description. This same confusion can and does occur with regards to other responsibility areas: conducting meetings, following up meetings, preparing budgets, handling problems, etc. If major tasks are not listed, false expectations can arise. Under these conditions, problems are inevitable.

New directors or chairpersons are particularly susceptible to role confusion. Therefore, at the end of each year or when a position holder leaves, the job description should be updated and made task-specific. Then, prior to their role negotiation session, the volunteer and staff leaders can each review copies of the updated or previous position holders' job descriptions. An overall picture of the two roles and their relationship to one another should emerge. Ultimately, a framework within which to define and negotiate a new volunteer-staff partnership will have been constructed.

STEP 3

Discuss the Organization's Perspective on Volunteer and Staff Leadership Roles

Many volunteer organizations have learned through years of trial and error that they are most effective when volunteers and staff assume different, but complementary, responsibilities. One well-known human service organization has adopted the position that a volunteer-run system is the optimum arrangement. Volunteers take primary responsibility for certain decisions and activities, while staff is expected to provide them with necessary guidance and support.

Usually, the specifics of a large organization's philosophy on volunteer-staff roles are left to the local units to define according to their unique circumstances. This leaves wide latitude for defining and negotiating roles best suited to those involved. Some organizations, however, are more rigid. They may operate under legal or political constraints that require them to assign certain responsibilities to staff and others to volunteers. This leaves less room for flexibility in role assignments and ought to be clarified before negotiations begin.

The organization's position on the purpose of volunteers and staff should be discussed prior to defining and negotiating the specifics of leadership roles. The discussion should continue until both parties understand and reach agreement on how this position relates to them individually. In this way, if confusion or conflict arises later over division of responsibilities, the position of the organization can provide a basis for resolution. Experienced members should be careful to avoid distorting the organization's philosophy in order to manipulate an inexperienced member into compliance. If the latter would have resisted otherwise, forced compliance may only lead to difficulties in the future. This can be minimized if the organization has a written statement of its position on volunteer-staff roles.

STEP 4

Give Each Other Permission to Redefine or Negotiate a Role

Often, people will accept a definition of their job responsibilities without voicing objection. New volunteers are vulnerable to this trap, particularly when they are dealing with experienced staff. Even though they anticipate problems when accepting certain tasks, they acquiesce to the will of their seasoned colleague. As a result, it is not uncommon to hear top-level volunteers privately utter things like, "Everything is going fine now, but in two months I'll be responsibile for recruitment, which I hate. That's when I'm going to wish my term as president was over!" Problems like this could be anticipated if the volunteer felt at ease about expressing true feelings during the discussion of various job responsibilities.

Negotiators may also suppress their true feelings during initial encounters in order to "put on a good face" or "start off on the right foot." These can be better achieved, however, if both persons genuinely give each other permission to redefine or negotiate the partnership so that it is mutually acceptable. Simply because the previous volunteer chairperson defined committee recruitment as a major responsibility does not mean the new chairperson will feel capable of doing this. Even though the previous staff person may have dealt with community and volunteer complaints, this does not mean automatically that the new one will have time to do this and coordinate newly established community programs. If a person is not motivated, lacks the ability, or is constrained by circumstances from carrying out a certain responsibility, being forced to assume that responsibility increases the "costs" associated with the job. This ultimately reduces one's motivation to exert the effort required for successful performance. A good partnership needs all the motivational drive it can muster.

HOW WELL IS YOUR LEADERSHIP ROLE DEFINED?

The following exercise is an abbreviated version of one developed by Dr. Marx to facilitate the role definition and negotiation process for volunteer and staff leaders. Carol Phelps and Carroll Phrommer of the American Cancer Society, California Division, Inc., contributed to the creation of this task list.

INSTRUCTIONS

Listed below are a number of different tasks involved in the management of a volunteer committee. Volunteer and staff partners should make separate copies of this list, privately review their updated job descriptions, and without conferring with each other, circle the appropriate letter to indicate whether they believe a task is the responsibility of:

V	—	*the Volunteer*
SV	—	*Shared, but predominantly the Volunteer*
SS	—	*Shared, but predominantly the Staff Person*
EDS	—	*Either person Depending on Situation*
S	—	*Staff Person*

(If the EDS option is selected, each respondent should briefly describe, on a separate sheet of paper, those situations in which the volunteer should act and those in which the staff person should act.)

Still without conferring, both persons should return to the first area of responsibility and proceed through the list, putting stars in front of those tasks they would like to see assigned differently.

When the volunteer and staff partners have completed the exercise on their own, they should come together to discuss the results along the lines suggested in the article.

When the discussion is completed and agreement reached, the final results can be typed into a task-specific job description as described in the article.

A. SELECTION AND RECRUITMENT OF COMMITTEE MEMBERS

Whose job is it to:	Circle one:
1. Identify the qualifications to serve on the committee?	V SV SS EDS S
2. Contact potential volunteers to be recruited for the committee?	V SV SS EDS S
3. Explain to potential committee members what is expected of them?	V SV SS EDS S
4. See that additional volunteers are recruited to carry out committee programs or activities?	V SV SS EDS S
5. See that these volunteers are properly oriented to the organization?	V SV SS EDS S

STEP 5

Redefine or Negotiate Responsibilities and Tasks

This is the most important and delicate step in the process. First, volunteer and staff leaders review the job description for their positions. They can check off any major responsibility or task about which they have questions or lack the desire, ability, and/or circumstance to carry out effectively. Then they can review the job description for their partner's position and again check off any major responsibility or task about which they have questions or possess the desire, ability or circumstance to carry out themselves. When both persons have completed this procedure, they can compare the job descriptions and begin discussing them.

During the discussion, each person briefly explains why a responsibility or task was checked off and then invites the other person to respond to this explanation. For example, the volunteer may feel that meeting agendas should be prepared by the director and then sent to him or her for final approval. The director may feel that just the opposite arrangement is preferable. In the discussion which ensues, both persons undoubtedly will come to a better understanding of such things as how the system operates, e.g., volunteers report to volunteers and staff report to staff; how certain tasks require performance of other tasks, e.g., running the meeting requires preparing the agenda; how staff and volunteer responsibilities can complement each other, e.g., one prepares the agenda, the other has it typed and mailed; the nature and extent of their partner's role responsibilities, e.g., the director is often out of the office and does not have time to handle meeting preparations alone.

Forcing agreement or belaboring a particular point is unwise. If both people agree to redefine or shift a particular responsibility during this discussion, the change should be written into their job descriptions. If agreement cannot be reached immediately, the item should be starred for future reference and the next one discussed. This procedure should be followed until all checked items either have been changed or starred.

There are several ways to dispense with the starred items. First, it may be possible to delegate one or more of them to someone else, e.g., the chairperson-elect. Second, the responsibility could be divided between them, each could take a turn, or they could perform the task jointly. Third, one person could agree to assume a responsibility, but schedule a tentative renegotiation session in the event of difficulties. Finally, both persons could bargain for the remaining responsibilities. Typically, one would agree to perform an

6. See that these volunteers are trained to carry out the committee's programs? V SV SS EDS S

7. See that these volunteers are properly oriented to the committee's function and programs? V SV SS EDS S

B. MEETING PREPARATION FOR COMMITTEES

Whose job is it to:

1. Select the date, place and time of the meeting? V SV SS EDS S

2. Make arrangements for the meeting, such as parking, room, lunch, etc? V SV SS EDS S

3. Prepare the agenda for the meeting? V SV SS EDS S

4. Provide background data or a situational analysis on a particular decision or agenda item? V SV SS EDS S

5. Send a notice of the meeting and copy of the agenda to members? V SV SS EDS S

6. Invite other volunteers or community members to the meeting for consultation, etc.? V SV SS EDS S

7. Invite other staff members or volunteer unit executives to the meeting? V SV SS EDS S

8. Make arrangements for any special presentations, e.g., films, speeches, videotapes, to the committee? V SV SS EDS S

9. Arrange for any equipment that is necessary for the meeting, e.g., flip charts, visuals, etc.? V SV SS EDS S

C. CONDUCTING COMMITTEE MEETINGS

Whose job is it to:

1. Provide the organization's policy perspective or position on certain issues? V SV SS EDS S

2. Delegate responsibility or give "charges" to committee members? V SV SS EDS S

3. Conduct the meeting and maintain order during discussions? V SV SS EDS S

4. Bring out facts, share past experiences, or point out alternative approaches to guide decisions? V SV SS EDS S

activity in exchange for not having to do another.

If a tough role negotiation session is anticipated, this should not encourage procrastination. Instead, it should act as a harbinger of potential conflict in the future. Negotiating when feelings of goodwill are strongest is the wisest policy. Delaying the confrontation only makes it more serious, especially if bad feelings arise from unmet expectations.

Once negotiations are complete, volunteer and staff job descriptions should be retyped with the changes. Volunteer responsibilities and tasks can be listed in the left column and staff responsibilities and tasks in the right column. Both persons should receive copies, sign and date them as though a contract was being approved.

STEP 6

Redefine or Renegotiate Responsibilities If Problems Arise

Sometimes a person will accept a responsibility or task in good faith, but discover it involves more time and effort than expected. When this happens, it may be necessary to redefine or renegotiate one's role. Volunteer and staff leaders can often sense when one or the other of them has a problem. If there is evidence the problem is related to roles, it is often fruitful to arrange a relaxed meeting to discuss possible changes. It is a good policy automatically to set a date for three or four months after the original role definition session to meet and discuss roles again. The two persons involved can review any change in their circumstances and proceed to renogotiate roles as they did in the previous step.

A large number of leadership problems in volunteer organizations are due to inadequately defined roles. Volunteers and/or staff often lack a complete understanding of the overall purpose, major responsibilities, and typical tasks involved in their jobs. Yet, this understanding is critical. The six steps suggested in this article, if followed carefully, will contribute greatly to mutual understanding. They will also contribute to a more effective volunteer-staff partnership, if in the process of defining and negotiating their roles, both persons create a relationship based on equality, openness, cooperation and interdependence.

Michael Marx is owner of Michael Marx Associates, a consulting firm that provides management expertise "in all areas of human productivity." He designed the volunteer/staff leader exercise described above as part of a training module for the American Cancer Society, California Division.

5. Take minutes and see that they are typed up for distribution? V SV SS EDS S

6. Generate new ideas for the conduct of ongoing or new programs? V SV SS EDS S

7. Settle disagreements that arise between volunteers during the meeting? V SV SS EDS S

8. Assign volunteers to sit on other committees to act as a liaison? V SV SS EDS S

D. FOLLOW UP COMMITTEE MEETINGS

Whose job is it to:

1. Mail out the minutes to committee members with any additional reference materials? V SV SS EDS S

2. Write and send thank-you letters to the appropriate agencies or people? V SV SS EDS S

3. Contact volunteers to follow up on their progress? V SV SS EDS S

4. Be informed by volunteers of their progress on a particular project, task, etc.? V SV SS EDS S

5. Handle day-to-day routine business of carrying out program plans? V SV SS EDS S

E. PROBLEM SOLVING

Whose job is it to:

1. Replace a volunteer or committee member who is not fulfilling his or her responsibilities? V SV SS EDS S

2. Solve problems or conflicts that arise involving volunteers? V SV SS EDS S

3. Solve problems or conflicts that arise involving staff? V SV SS EDS S

4. Handle difficult requests for information from the community regarding committee activities? V SV SS EDS S

5. Clarify procedures, program objectives, or policy questions raised by volunteers? V SV SS EDS S

A VOLUNTEER PROGRAM EVALUATION CHECKLIST

WAYS TO GATHER INFORMATION TO ASSESS THE PRESENT AND PLAN FOR THE FUTURE.

By Jeff Pryor

ONE HUNDRED PASSENGERS on a northbound jet had just had their dinner trays cleared and were preparing to land. The pilot had completed all the necessary procedures and notified Air Traffic Control of his arrival. Air Traffic Control granted clearance for landing, specified the runway and informed the pilot of local weather, wind speed and traffic patterns. Because the sky was clear, the pilot flew the plane visually, siting the runway off in the distance. As the plane descended, however, he became concerned about the length of the runway. Even with full brakes and reversed engines, the jet rolled to the end of the runway, its front wheel easing off the pavement into the mud.

Everything the pilot had done was standard procedure—except that he had landed at the wrong airport, some sixty miles from his destination. Each year the little town of Buffalo, Wyoming, celebrates the day the pilot put them on the map.

Program evaluation is much like this plane trip: All programs have a desired destination or outcome. However, where they get is not always where they should be going.

We in the human services field have a tendency to become too caught up in the activities of our programs to find the time to evaluate them. If we are serious about finding solutions to problems, however, we must constantly analyze what we are doing and what we need to do to improve our programs.

Jeff Pryor is the executive director of Partners, Inc., a nonprofit program based in Denver that matches adult volunteers with juvenile delinquents and predelinquents.

The following checklist outlines ways to evaluate all aspects of your program. Each method is simply a way of collecting information. They are particularly useful measures for volunteer programs, which usually work with very scarce financial and human resources.

Programs Goals

The overall function of a program, its charter and principal goals should be reviewed annually (perhaps at a board meeting). This review allows regular modification in the overall design of the program.

Outcome Measures

Outcome measures are simply a study of a program's impact on its participants compared to a control group of similar situations and backgrounds not involved in the program. Outcome measures can provide information on reinvolvement, school or work performance, volunteer behavioral and attitudinal changes, etc.

In most cases, outcome measures are taken over a three-year period. The first year is spent in designing and organizing the evaluation; the second and third years are spent in data collection, review and analysis. This evaluation can be complex and often expensive, for it requires finely tuned measuring devices (instruments) given to a sample group of people who represent a larger population over a specific period of time. Local academic institutions often can assist in the development and contracting of outcome research.

Internal Measures

Program managers can obtain immediate information and perceptions about their program from the people they work with. As supervisors they give individual staff an opportunity to voice their opinions, insights, frustrations and recommendations. The volunteers as well can provide the same information from their vantage point. In addition, the manager can obtain the observations of each individual who comes in contact with the program. Such information may be related to the program's services, or it might provide indications about staff and volunteer morale, clarification of responsibilities, the individual's sense of importance.

Process Measures

The steps we take towards a solution—the direction in which we are headed—is a process. Recruiting volunteers—a process—is a difficult task. Finding out what types of methods work and what type of volunteers are generated from a different recruiting method is an important process measure. Others are:

____Number of volunteer assignments.

____Active volunteers. (This number will be somewhat different from the number of volunteer assignments because it should measure on a monthly basis the number of people involved to account for attrition.)

____Interested potential volunteers. (Those who have not participated in program orientation, training or screening but have expressed an interest and are readily available volunteers.)

____Average number of days before assignment. (This measure can help prevent a long wait for both volunteer and individual being served by the program. Breakdown according to sex is important to some programs, because it can be used in helping to change marketing plans.)

___Volunteer assignment completion. (Each volunteer in the program should have a job description and an understanding of the tasks to which they are responsible. Monitoring accomplishments of their tasks gives an understanding of how well they are performing. Specifics might include number of hours, contacts, services, etc.)

___Client assignment completion.

___Number of support contacts for volunteers from program staff or volunteer coordinators. (Volunteers usually are more productive if they are supported. Keeping tabs on the consistency of such support can provide useful information. Analysis may deter the types of contacts for the future.)

___Average duration of volunteer participation. (Most programs require a commitment of time and duration. Some volunteers move or quit. Measuring their duration can give program staff insight about time commitments and perhaps ideas as to how to give better support to volunteers during their critical period.)

___Participation by volunteers and clients in program activities. (If your program has such a component, this information can provide insight into desirability of activities and their effect on volunteers and clients. In addition, the percentage of volunteers and clients participating in activities can be compared to those who do not contribute.)

___Participation by volunteers and clients in special activities. (From time to time, every program involved in the development of special activities must measure the impact of these special assignments and opportunities. If a certain activity is successful, then additional analysis might be used to determine whether or not such special activity should be incorporated into the program. One of Partners' programs made recommended assignments for juvenile offenders to participate in community service projects. The impact of the service was significant. Not only did the community feel more positive about the efforts of the juveniles and volunteers, but the juveniles also felt good about their ability to contribute. Because of its success, the community service project was incorporated into our program. Be careful to measure all aspects, including time, money, services and impact on the overall program.)

___Hours contributed by volunteers by assignment. (It is important to be able to document to the community-at-large the number of hours volunteers participate in a program.)

Be careful about process. It cannot tell you everything. You may require a volunteer to spend five hours a week counseling a client. You may average six hours a week of time per volunteer, but you will also need to know whether the contacts in general are producing results, how much the contacts cost, if the volunteer feels that the activity is meaningful; what impact is the total contribution by volunteers having.

A program manager plugs process measures into the total informational picture. If outcome measures show that client behaviors are changing because of the volunteer, for instance, it may be assumed that the time spent by volunteers is critical to the behavioral change.

Process measures should be taken on a monthly basis, which allows trends and specific problem areas to be identified for quick modification in program activities.

Program Measures

Other information used to determine the health of a program are:

___Budget accuracy. (Monthly evaluations should occur to determine the accuracy of proposed budgets. The information can be used to help modify other expense items, if one area increases, or can be used to help determine a more accurate budget for the future.

___Funding. (A continuing evaluation of available financial resources.)

___Staff/volunteer client training. (This measure consists of subjective observation to review pre-service and in-service training for all program participants.)

___Relationship with community agencies. (Program managers should keep in close contact with their peers in other agencies and invite critiques and comments.)

___Public relations. (A program from time to time should spot check its relationship to its community. A study conducted on national delinquency prevention programs, for example, found that only two of eight had significant public identity. In some cases, people who lived next door to a program's facilities had no idea what was going on!)

___Board and committee participation. (A function of most human service programs of which an evaluation should determine the level of participation. Such involvement can benefit a program and should therefore be the subject of careful review.)

___Accomplishments. (Management, staff and volunteers should document accomplishments to understand the nature of the success and modify the program to increase the opportunity for success.)

___Concerns. (Documentation of concerns may lead to a greater ability to avoid problems through experience.)

___Information on special projects. (An evaluation plan should be designed and completed in relation to all special projects to determine their value and relationship to the overall program. The amount of special time the activities consume and any specific information that might be useful should be included.)

___Cost effectiveness. (A general evaluation can simply take the number of clients served and divide it by the total cost of operating the program. More complex but more useful information can be obtained by comparing the cost of the specific program to ones of a similar nature or other alternatives.

___Similar programs. (A manager should always have access to what is happening in other programs of similar nature. "Competition" has never been a positive word in human services, but "resourcefulness" has. Evaluating the performance of other agencies, their problems and successes, can give insight into how to capitalize on their experience.)

___General program information. (Unsolicited complaints or compliments should be documented. If frequency goes beyond coincidence, it may lead to modification of the program. For example, if compliments come in regarding a special function of the program, perhaps the priority of the function will change.)

Time audits. (Periodic review of time expenditures by staff and volunteers can determine the percentage of time those people dedicate to specific functions of their jobs. Time audits can break down a person's time into categories.)

____Historical information. As an organization grows and people change, much can be lost in the evolution unless good documentation is kept. A running log should be kept by program staff, managers and volunteers. Program managers can contribute to the vitality of the organization by understanding the possible effects of its history.