

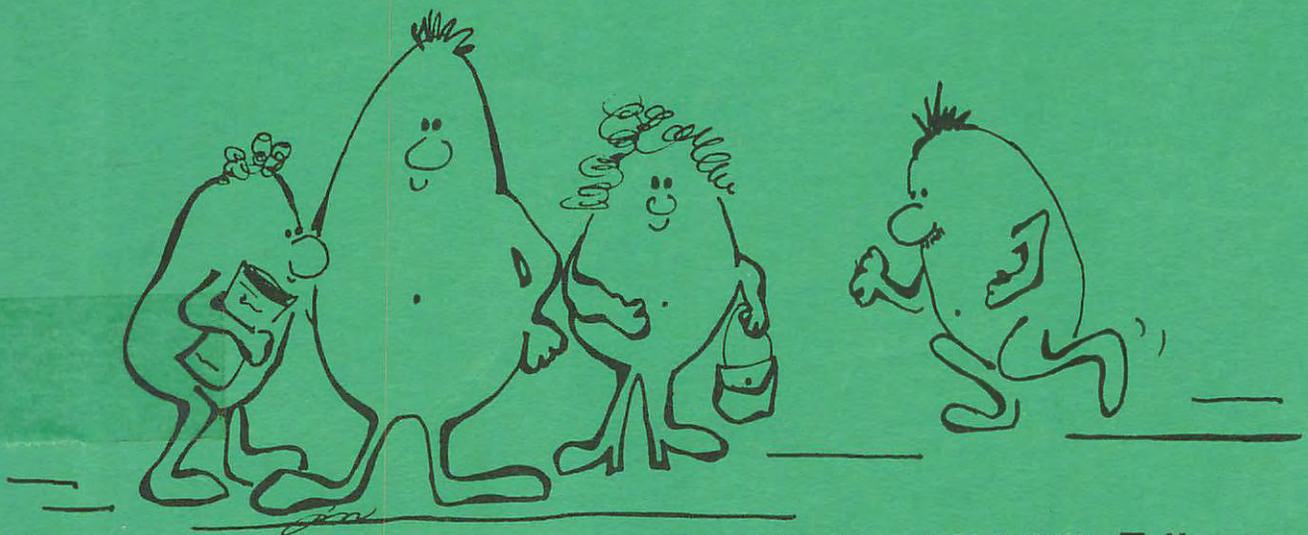
# **VOLUNTEER**

# **Recruiting & Retention**

**A Marketing Approach**

**by**

**Nancy Macduff**



**JANIE MILLGARD, Editor**

**JEANNE MEABON, Illustrator**

VOLUNTEER RECRUITING AND RETENTION:  
A MARKETING APPROACH

by  
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1985

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DEDICATION

To the hundreds of volunteers of the  
Walla Walla Council of Camp Fire who  
taught me to be a volunteer manager.

#### ACKNOWLEDGEMENTS

Special thanks to Janie Millgard, my patient editor; Jeanne Meabon, my inventive illustrator; my students who aided the editing process; Jean Benson, an understanding boss; and especially Floyd Bunt, who helps me see that all things are possible.

N.M.  
Walla Walla  
1985

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INTRODUCTION

## INTRODUCTION

The management of volunteer programs is often done by people who have no special training. They begin with a skill in one aspect of volunteer management and then learn that a whole array of skills are needed to successfully direct the work of volunteers. This manual is designed to help those working with volunteer programs see their efforts as a sequential process.

The manual is divided into steps related to successful volunteer management. In each chapter, there is a narrative section which develops and explains those skills and ideas necessary to the successful volunteer program. The next division is an exhibits section which provides outlines, handouts, and/or overhead displays, and a bibliography for further reading on the topic.

The philosophy of volunteer management espoused in this book comes from two sources. The marketing strategy of profit making business is wedded to the theories and practicality of adult development and learning. It is an attempt to join the best of both worlds for the effective delivery of program services through the efforts of volunteers.

The manual also displays the author's opinion that the best volunteer programs are those owned by the volunteers who work in them. The trend to staff decision-making is doomed to failure. Volunteers want in on the action. Their work and commitment will be in those agencies/organizations that include them as partners dedicated to delivering service. The bias of the manual is in favor of intense volunteer involvement, responsibility, and authority.

CHAPTER 1  
MARKETING



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## CHAPTER 1

### MARKETING

"Marketing" is the process of conducting business used by profit-making companies. Some volunteer organizations have used the "marketing" process with success. Frequently, volunteers and staff use the word marketing to describe the advertising and sales phase of a marketing plan. In fact, advertising and sales are the final steps of the marketing plan. Research and planning are the first steps and need to precede advertising and sales. Philip Kotler, a noted author on marketing says "marketing includes needs assessments, market research, product development, pricing, and distribution." (Kotler, 1983) Selling, advertising, and promotion are the result of product development.

The marketing steps of volunteer programs in private non-profits, government agencies, or corporations is the same. It merely uses different jargon.

## Marketing Plan for Volunteer Program

1. Conduct needs assessment
  - a. Community
  - b. Program
2. Program Review
  - a. Develop new program
  - b. Revise existing program
3. Research the people who will buy the program
  - a. Clients
  - b. Volunteers
4. Establish a plan to recruit volunteers to the program through promotion and advertising
5. Develop support for the program
6. Evaluate the program

The following chapters will help you achieve your marketing plan. Chapter 2 will tell you how to do a community or program needs assessment, the first step of a marketing plan. Chapter 3 describes a simple strategic planning process. In Chapter 4 you will learn to plan new programs or refurbish existing ones. Chapter 5 deals with market research. It defines the type of research you must do to attract clients and/or volunteers to a program. It also provides worksheets to help volunteers

and staff complete this part of a marketing plan.

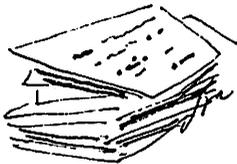
Chapters 6 - 9 break the recruiting phase into its component pieces. This includes information on job descriptions, how to select and train recruiters, tactics for advertising and promotion, and effective application, interviewing, and contract techniques. It relies heavily on the first three chapters for its support. Chapters 10 - 12 deal with the personnel issues that must be addressed by all volunteers programs: motivation, training, and supervision. This is the maintenance phase of a program.

The last three chapters cover the evaluation and recognition aspect of volunteer programs. The last chapter especially brings the marketing plan full circle. The program is evaluated by reaching back to the needs assessment and goal setting phase of the marketing plan.



CHAPTER 2

CONDUCTING A NEEDS ASSESSMENT



## CHAPTER 2

### CONDUCTING A NEEDS SURVEY

These Americans are the most peculiar people in the world. You'll not believe it when I tell you how they behave. In a local community in their country, a citizen may conceive of some need which is not being met. What does he do? He goes across the street and discusses it with his neighbor. Then what happens, a committee comes into being and then the committee begins to function on behalf of the need.

Alexis deTocqueville

For over 100 years, the needs survey or community assessment has been a major responsibility for volunteers. These are the tools needed to make decisions about the programs offered by agencies/organizations in local communities. The best program planners conduct them with regularity. It should not take twelve months to complete one. The process should be simple. The assessment should evaluate programs individually. It should look to the community for needs that could be filled by the agency. It must ask questions about programs which exist and programs that should exist, but do not.

## Community Needs Assessment

The Community Needs Assessment should be conducted on a regular schedule every 3 - 5 years. Its purpose is to ask people inside and outside the organization what they perceive as the needs for your client in the community and how they assess the job you are doing. This is the first step in strategic planning. It lays the foundation for a Board of Directors or Advisory Committee to establish future directions for the agency. Begin with the Board of Directors or Advisory Board authorizing the formation of a small, but select committee of volunteers, staff, and citizens not affiliated with the organization. The committee should be balanced demographically and in their spheres of influence. Include people from different social and economic groups, and user or client groups and the work of the committee will be more effective.

The Needs Survey Committee has several tasks.

- 1) Establish a schedule for conducting its survey.
  - 2) Outline the format the survey will take.
  - 3) Conduct the survey.
  - 4) Draft a report presenting the results.
- The schedule is most realistically accomplished over a six month period. The following is a sample schedule:

January: Formation of Committee  
February: Establishing Schedule/Survey format  
March: Conducting Survey  
April: Draft of Survey Results  
May: Conclusions/Final Report  
June: Presentation of Report to Advisory Committee

Surveys can be conducted by mail, by telephone, or face-to-face. They can be comprehensive written documents of several pages, or a brief oral interview. The Community Needs Assessment Committee should decide the depth of information required for the agency and clients they serve. Outlining the format includes making decisions about who conducts the surveys and who receives the data once collected.

When Boards of Directors or Advisory Committees begin to use strategic planning, the process should be simple and effective. Professional staff are teaching adults a method of planning. "Furthermore, the enormity and complexity of contemporary societies changing needs and interests demand continuous and comprehensive ... education." (Boone, 1980) The Needs Survey Committee should follow a format for conducting a community survey

that is easy. (See Page 20) Questions should be written and consistent for each interview.

The Needs Survey Committee must interview its own membership/clients. The people who have valuable answers about programs and services are those who receive them. Be sure to include specific administrative volunteers, clients, members, chairpersons of committees, members of the Advisory Board, and volunteers who work closest to the members.

A critical part of the planning process is to make sure the data doesn't already exist. Research is done by many agencies. The committee can shorten their survey process by checking with local community action agencies, county/city government, United Way, or other agencies which regularly collect needs assessment data. If demographic information is available and current, the list of people to be interviewed could be shortened considerably.

Next designate a member of the committee or staff person to communicate with those conducting interviews to see if they are completing their work. Compile the report into a draft for the committee to review. It is critical that the person responsible for writing the

report make clear that revisions and suggestions are welcome and expected.

The report should include copies of written material used; description of the survey process; a list of persons surveyed; questions asked, and demographic information collected. The report should be purely statistically information with no interpretation of the data. Numerical values should be included as well as percentages.

The raw numerical data is used by the committee to draw conclusions. These conclusions are used to provide recommendations to the Advisory Board or Board of Directors. Recommendations are part of the report to the Board of Directors/Advisory Committee.

A Needs Survey should be done every 3 - 5 years. The research and recommendations are reviewed regularly for accuracy and relevance. The Survey findings and recommendations should be used to draft goals and objectives for the agency. Work plans for administrative volunteers, staff, and committees are formulated from the goals and objectives of the Advisory Committee.

Edgar Boone makes a strong case for involving volunteers in the process of determining community needs.

Regardless of whether the setting is urban or rural, however, planned community development is imperative. Such activity begins with an educative process that involves local residents. Without their full participation in establishing need ... such programs ... will fail. (Boone 1980)

#### Program Needs Assessment

Agencies and organizations should also evaluate programs currently in existence on a regular basis. At least once a year, a program review committee or a committee of volunteers working directly with a program should examine the services of each program and determine its effectiveness. Additionally, they are beginning the process of setting objectives for the coming year. (See Chapter 3)

A Boy Scout Council might ask the Program Committee to examine the Explorer program. The Committee would look at quality as well as quantity of service. The Hospice Program would review the levels of service and determine the quality of counseling given. All programs need continuous monitoring and evaluation. There is a hand and glove relationship between needs assessment, the establishment of agency goals, and program development by committees of the Board of Directors/Advisory Committee.

The Program Needs Assessment is similar to the Community Needs Assessment, in format, but reduced in scope. Sometimes a program committee can review all programs offered by an agency. This depends on the scope and numbers and organizational structure of the agency. The Committee determines who in the agency should be questioned. Sometimes it is wise to question the complainers as well as those who are supportive. Another group to be interviewed is other agency staff and/or volunteers who work in concert with the organization. Hospice, for example, might want to include doctors, nurses, and hospital staff in a needs assessment, as well as clients and family members. Cooperative Extension might talk with farmers, agri-business owners, and/or other youth agencies.

The interview should be uniform and the questions designed to get accurate information, areas to improve, and recommendations to reduce, eliminate, or expand the program to better meet needs.

Another area that is critical is the effective use of volunteers. The best program design in the world will not make up for ineffective or non-existent volunteers. Following the needs assessment interviews,

the committee should examine the volunteer component.



This includes a brief explanation of how volunteers are utilized in the program. This would indicate that volunteers are used as peer counselors, receptionists, secretaries, troop leaders, or big brothers. Once you have identified all the volunteer placements for a program you would comment on their effectiveness. Has the secretarial support been adequate? Does the volunteer receptionist segment need expansion because it works so well? Is there a continuing problem with recruiting troop leaders? The final step is to make recommendations. Should some segment of the volunteer placements be discontinued. Should the Board of Directors be urged to raise funds to impact the recruiting effort? Are there places where volunteers could be used and are not?

The results of this survey should lead to recommendations which can be shared with the Board of Directors and staff. The Program Committee can also be directed by its evaluations. Using the organization or agency goals, the



committee objectives are more wisely drafted if they speak to real needs. For example, if the focus of the organization is to increase volunteer involvement by 10%, the Program Committee will be guided to concentrate on improving those areas of a program that would most impact an increase in volunteers.

Program Committee members should be wise enough to recommend the discontinuation or suspension of programs. If the organization has offered a program for several years, and the need is largely being met . . . then retire it. The March of Dimes is an agency of volunteers who worked hard. The result of their efforts saw the eradication of polio in the 1960's. During this period they identified another need . . . birth defects. Now their efforts are focused primarily on the elimination of birth defects. They survived a substantial change in the focus of their agency. More organizations should adopt the same attitude.

Volunteer organizations and agencies should always offer traditional programs such as: classes at the YWCA, a youth trash pick-up program by a state government agency, or tax assistance for senior citizens by the Internal Revenue Service. Needs assessments tell

volunteer agencies of services they might provide which meet community needs: YWCA offering a career planning and placement center for women, a youth volunteer program to enhance rest stops on highways by a state government agency, or tax assistance to refugee families by volunteers of the IRS.

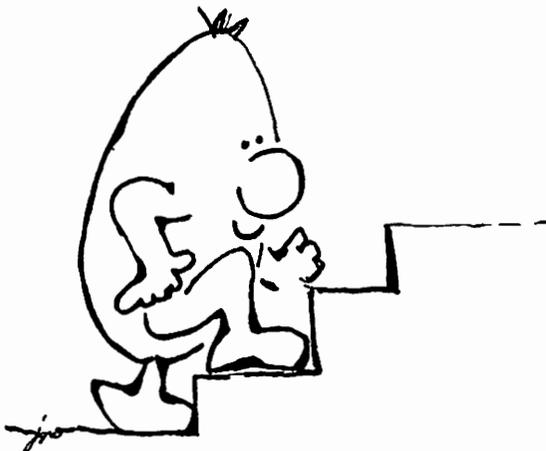
Volunteer programs operate best who adopt the "Baskin and Robbins" theory of program development. This theory purports that to be successful you always offer vanilla, chocolate, and strawberry. Periodically you run in a "flavor of the month" such as "Bubble Gum Crunch".

Once an agency has compiled the reports on a Community Needs Assessment and internal Program Needs Assessment, they move to the next stage of marketing. The first step in program development is to establish goals and objectives and work places for staff and volunteers. This is commonly referred to as strategic planning.

All programs need continuous monitoring and evaluation. There is a hand and glove relationship between the needs assesment, the establishment of agency goals, and the programs development by committees of the Board of Directors/Advisory Committees.

## STEPS IN NEEDS SURVEY

1. Community or Needs Survey
2. Compilation and Interpretation of Data
3. Recommendations to Advisory Committee or Board of Directors



## COMMUNITY ASSESSMENT

### A Guide to a Three Month Community Assessment

1. Board of Directors/Advisory Committee decide to conduct a Community Assessment.
2. President/Chairperson appoints an Ad Hoc Community Assessment Committee.
3. Ad Hoc Committee develops a plan for the areas to assess and questions to ask.
  - A. Who do we ask about our community and our agency?
    - 1) educators
    - 2) church leaders
    - 3) law enforcement personnel
    - 4) other social service agencies
    - 5) our own members
    - 6) our own Board
    - 7) members/clients
    - 8) non-members/clients
    - 9) elected officials
  - B. What questions do we ask of those outside the agency?
    - 1) what does our community do well in the area we serve?
    - 2) what are your top concerns for our community in our area of service?
    - 3) what do you think of our agency?
  - C. What questions do we ask of the people who are a part of our agency?
    - 1) the same questions for those outside the agency
    - 2) what does our agency do for you personally?
    - 3) what services do we provide that meet your needs?
    - 4) what services could we provide that would help you?
4. Ad Hoc Committee/Staff compile the raw data.
  - A. Analyse the raw data and develop an outline of report and conclusions.
  - B. Prepare report to present to the Board of Directors/Advisory Committee.
5. Board of Directors/Advisory Committee establishes goals/objectives based on Community Assessment information.
6. Committees and staff develop work plans based on the goal/objectives.

## PROGRAM NEEDS SURVEY PROCESS AND QUESTIONS

1. List major constituencies of our community that are knowledgeable about our services and/or clients. (racial, religious, ethnic, educational, political, medical, governmental, agricultural, etc.)
2. Decide which persons in those constituencies who should be asked their opinion about our agency. (Example, Chief of Police, school principal, director of mental health center, members/clients of our agency/organization, and Chairperson of Crop Association, etc.)
3. Collect demographic data on the client group or geographic area served. (population, races, sex, employment, single parent households, etc.)
4. Decide what questions you want to ask those persons, such as:
  - \* What services does the agency offer to the community that you perceive as being successful and meeting current needs of our clients?
  - \* What image do you have of ..... (insert name of organization)?
  - \* What needs exist in the community related to the client group we are serving?
  - \* How could those needs be met?
  - \* What recommendations would you make that could help us improve our current services?
  - \* What recommendations would you make for new programs we could offer?
5. Assign who will interview each person.
6. Provide the committee conducting the interviews with a sheet containing questions and room for answers? (Multiple copies)
7. Determine date for interview completion.
8. Designate person to receive interviews as they are completed and call members to see how they are progressing.

This needs survey could be completed through telephone interviews in less than a month.



## PROGRAM ASSESSMENT PROCESS

1. Decide which persons in the organization should be asked their opinion about our programs.  
(Example, clients, parents, relatives, staff, direct service volunteers, companion agency staff and volunteers)
2. Collect statistical information (clients served, number of volunteers, retention rate, volunteer turnover)
3. Decide what questions you want to ask those persons, such as:
  - \* What do you perceive as being successful about this program?
  - \* What image do you have of our programs?
  - \* What needs exist that are not being met in this program?
  - \* How could these be met?
  - \* What recommendations would you make that could help us improve our current services?
  - \* What recommendations would you make for new programs we could offer?
4. Evaluate volunteer use and effectiveness.
5. Assign who will interview each person.
6. Provide the person conducting the interviews with a sheet containing questions and room for answers?  
(Multiple copies)
7. Determine date for interview completion.
8. Designate person to receive completed interview forms and call members to see how they are progressing.

This needs survey could be completed through telephone interviews in less than a month.

VOLUNTEER EFFECTIVENESS CHART

NAME OF PROGRAM	VOLUNTEER USE	EFFECTIVENESS	RECOMMENDATION

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CHAPTER 3  
STRATEGIC PLANNING

CHAPTER 3  
STRATEGIC PLANNING

The Board of Directors is charged with the responsibility for determining the direction of the agency. (In a governmental organization this might be done by staff and advisory committee members.) Once the community and program needs assessments are complete and have been reported to the Board or Advisory Committee, the strategic planning process begins. (See Page 32A)

Goals

There are two ways to establish goals. The first, and by far the most effective, is for the entire Board of Directors/Advisory Committee to participate in a process which allows everyone to contribute their ideas about the direction for the agency. (See Page 33) This can be done in a retreat session and be most effectively facilitated by an outside consultant who is seen by the participants as neutral. The second method is to assign this task to a small group. They most often are members of the Board of Directors, but might also include outsiders who have experience with strategic planning. (See Page 33A)

Whichever method of establishing goals and objectives chosen, the actual process should be highly

interactive. Volunteers and staff who participate in the determination of goals should feel a sense of ownership. Research on motivation would indicate that adults who really have a hand in the decision making process are more apt to work to insure the outcomes. Organizations and agencies that want meaningful goals and objectives to unify the volunteers/staff team must make everyone a part of the decision making process.

Goals are specific areas of organizational endeavor that will be attempted in the near future. For most volunteer organizations, a two year goal would be optimum. It must be achievable, measureable, observeable, flexible, and demanding. For example, this would be a goal:

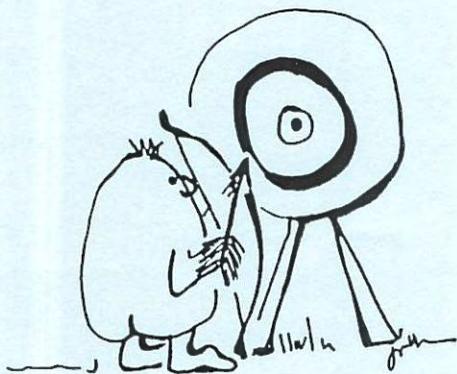
To increase the participation of non-Board members in the planning and implementation of Red Cross programs by 25%, by Annual Meeting of (year).

The goal sets an ideal for all committees and constituencies of the organization. Staff, volunteers, clients, and the public should be able to understand the direction established for the organization. The goals should reflect the results of the Needs Survey. The

purpose of the needs assessments is to guide the decision makers in the establishment of goals. The outcome should be 3 - 5 well crafted goals.

Keep in mind that it is appropriate to decide not to tackle a community need. A youth agency conducted a needs assessment. They discovered a real concern about drug abuse. After much discussion and soul searching they decided that launching a drug abuse prevention program was not in line with the purpose of the agency. They elected to support the efforts of others through participation on volunteer committees and by incorporating a stronger drug education program in their already existing format. They elected to support other existing programs, but not create an additional one.

#### Objectives



The specific target of an agency's or organization's endeavors can be found in its objectives. Objectives must be achievable, measureable, observable, flexible, and

demanding. (See Page 33B) Objectives are drawn by all areas of agency operation. If a Board of Directors has a

Finance Committee, Personnel Committee, and Public Relations Committee, each group would have a set of objectives based on the organizational goals. In the previous example of a goal, the Red Cross Chapter is intent on increasing community participation. An objective of the Blood Drawing Committee might be:

To establish the membership of the Blood Drawing work force as 50% Board members and 50% non-Board by December (year).

This specifies the exact target of their volunteer recruiting efforts. Each area of the organization should draft written objectives. These are used to focus work plans for both volunteers and staff.

#### Work Plans

Once objectives have been established, volunteers and staff should develop individual work plans. This effort is guided by the Executive Director, President, or head of the governmental agency most appropriate to oversee their accomplishment. The work plans relate to both goals and objectives. These too should be achievable, measureable, observable, flexible, and demanding. (See Page 33C)

The Executive Director, President, appropriate

staff, or Committee Chairpersons work with committees and or staff to develop specific work plans. To continue the Red Cross example, the Committee work plan proceeds from the goal and objectives:

Goal:

To increase the participation of non-Board members in the planning and implementation of Red Cross programs by 25%, by Annual Meeting of (year).

Objective:

To establish the membership of the Blood Drawing work force as 50% Board members and 50% non-Board by December (year).

Committee Work Plan (See Page 34)

Established objective: 50% increase in non-Board volunteers at Blood Drawing

How we will accomplish this objective:

1. Develop recruiting brochure for employee volunteers - Fall (year)
2. Ask each current volunteer to bring new person - campaign "Each one bring one" - June (year)
3. Special recognition for new volunteers at Blood Drawing - Annual Meeting (year)

The Committee's Work Plan is based on the original goal and then an objective for which the committee is

responsible. There are several ideas listed to meet the goal. At the time of planning committee members should be expected to take the responsibility for one of the projects offered as a suggestion.

Every committee should list the on-going tasks for which the volunteers and staff are responsible. In the example we have been using, you would list an objective related to conducting nine Blood Drawings a year. The work plan is a listing of the major components such as: location, doctor/nurse recruitment, volunteer groups providing snacks, etc.. Strategic planning must always include those things that are done year after year and the objectives and work plans aimed at helping serve more people in more effective ways.

#### Staff Work Plan (See Page 34)

The staff work plan should reflect the goals of the agency, the objectives of a committee or committees with which the person works, and the work plans of those committees.

#### Staff Work Plan

Established objective: 50% increase non-Board volunteers  
at Blood Drawing

How will I contribute to accomplishment of this objective

1. Draft brochure/costs for committee - Spring (year)

2. Work with Bob on proposed "Each one Bring One" campaign - Spring (year)
3. Review current recognition for Blood Drawing volunteers - report to committee Aug. (year)

The nuts and bolts of everyday work is left to the committees, volunteers, and staff. The plan is now a tool giving unified direction and focus to all the people working in a volunteer agency or program.

#### Monitoring the Plan

For a strategic planning process to work it must be monitored. (See Page 35) The Chairperson of an Advisory Board, President of a Board of Directors, and the paid staff must work together to keep the plan on track. This is not complicated, but requires an active involvement with the progress volunteers and staff are making as they work through the year. Strategic plans that are written, put on a shelf, and never used are a waste of time and money. Planning is a healthy process that will become easier the longer an agency practices it.

A synergistic relationship exists between all levels of an organization with this type of strategic planning. A cooperative effort from top to bottom is the most effective means to get results. The planning by a large

state agency in the capitol can only be as good as the individual work plans established by workers in the field who manage volunteers. Field staff of the state Heart Association can be most effective when their work is tied to the goals of the agency. Then there are both monies and human resources directed toward a mutual effort.

SUGGESTED OUTLINE FOR  
BOARD OF DIRECTOR/ADVISORY COMMITTEE  
GOALS AND OBJECTIVES

1. A meal
2. Review of the previous goals/objectives and how the agency has achieved them.
3. Each person lists 3 - 5 items they would like to see as goals for the agency in the coming year.
4. Participants number off by 3's. Small groups are formed and assigned a working area.
  - A. Write down everyone's ideas for goal/objectives
  - B. Eliminate duplicates
  - C. Group prioritizes the list by consensus
  - D. Write a new list on newsprint
  - E. Select a reported to report back
5. Small groups come back to one large group.
  - A. Each group presents report
  - B. Large group decides on the 2 - 3 major goals and objectives
    - 1) discussion is on issues
    - 2) use colored 'stick on' dots for participants to vote on their first and second choice or decide by consensus
6. Decision of the group is publicized in the newsletter or special mailing and is voted upon at the Annual Meeting of the Organization.

Participants in the workshop must include: Board of Directors/Advisory Committee, Staff, Committee members.

Time Frame: About 3 1/2 hours

## Strategic Planning Process

1. Complete community needs assessments and/or program needs assessments.
2. Report the results of a needs assessments to the group establishing the plan for the organization.
3. Group determines goals for the organization.
4. Committees establish objectives based on goals for each program or area of operation.
5. Committees create work plans based on objectives.
6. Staff create work plans based on objectives and workplans of committees to which they are assigned.
7. Top administrative volunteer and staff monitor the progress of the plan and see the reports are freely shared within the agency.
8. Plans become programs. (See Chapter 4)

G O A L S

must be

- |                |              |
|----------------|--------------|
| 1. measureable | 3. flexible  |
| 2. achievable  | 4. demanding |
| 5. observable  |              |

Write one to three goals you would like to achieve in the next year. Be sure they meet all of the above criteria.

1. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

2. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

3. \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

O B J E C T I V E S

must be

- |                |              |
|----------------|--------------|
| 1. measureable | 3. flexible  |
| 2. achievable  | 4. demanding |
| 5. observable  |              |

Write one to three objectives you would like to achieve in the next year. Be sure they meet all of the above criteria.

1. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

2. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

3. \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

COMMITTEE WORK PLANS

Established objective: \_\_\_\_\_

How will we contribute accomplish this objective?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

Established objective: \_\_\_\_\_

How will we contribute accomplish this objective?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

Established objective: \_\_\_\_\_

How will we contribute accomplish this objective?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_
5. \_\_\_\_\_

VOLUNTEER AND/OR EMPLOYEE WORK PLAN

Established objective:

How will I contribute to accomplish this objective?

- 1.
- 2.
- 3.
- 4.
- 5.

Established objective:

How will I contribute to accomplish this objective?

- 1.
- 2.
- 3.
- 4.
- 5.

Established objective:

How will I contribute to accomplish this objective?

- 1.
- 2.
- 3.
- 4.
- 5.

GOALS AND OBJECTIVES:  
Monitoring Strategic Planning

1. Complete a written document containing goals and objectives.
2. Distribute PLAN to all Board and staff.
3. Executive Director directs staff and committees to complete work plans.
4. President monitors objectives --
  - a. Quarterly committee up-date to Board on achievement of objectives
  - b. written reports to Board on objective progress
5. Executive Director/Volunteer coordinator monitors work plans --
  - a. regular monthly reports from staff
  - b. report to Board on how staff work is impacting objectives
6. Evaluation of completion --
  - a. at Annual Meeting
  - b. at last Board meeting of year
  - c. at first Board meeting of year
  - d. at following year's meeting to set new goals and objectives
7. Regular meeting to establish goals --
  - a. each year review/establish objectives
  - b. every second or third year review/establish goals (committees do objectives on year-by-year basis)

THIS IS A REPETITIVE PROCESS!!!

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CHAPTER 4  
PROGRAM PLANNING

## CHAPTER 4

### PROGRAM PLANNING

There is a close relationship between market research and program development and revision. The process is an overlapping one. It is virtually impossible to untie the two areas. They are separated here so program planners can examine the process in an isolated way. Thus, when the effort is underway at the organizational level, there will exist a system for making changes.

#### Reviewing Current Programs

One function of a Program Committee is to be involved in an on-going monitoring of services and/or programs. Staff can present regular reports, members can observe the program in action, or talk with clients or recipients of programs. Every 2 - 3 years the committee should undertake a thorough examination of all continuous programs, paying particular attention to the volunteer component.

The written assessment should be part of the objectives and workplan for the committee. A simple chart can provide a quick look at programs and services

(See Page 42). Using the organization needs assessment and Program Assessment Chart will provide background information necessary to revise a current program.

#### Developing New Programs

The Program Committee of the Board of Directors can carry out the investigation and development phase of new program offerings. However, this time consuming job can be done by representatives from the Program Committee, other Board or Advisory Committee members, and outsiders with knowledge of the program area, client group, and staff. This study committee can make recommendations to the Program Committee. This allows for well-crafted proposals to be presented to the Board of Directors or central administration of a governmental agency. It does not interfere with the ongoing work of the committee and provides a thorough development of a program/service.

The Study Committee has a short life and very specific direction, from the Program Committee and/or Board of Directors/Advisory Committee. (No longer than one year.) Their job is to review needs, current community services to meet those needs, preliminary program format, financial support capabilities of the organization, and brief descriptions of the anticipated

volunteer support structure.

For example, a Study Committee assignment for a local youth agency is to present a program model for physically handicapped youth. They should start by verifying that there is a need, where the need is greatest (geographically, by school, by neighborhood), and what need can be met by the program of our agency. Whether revising a program or beginning a new one, the development stage is similar.

#### Program Plan

The plan for a program change has several elements. Begin with the identification of the client or member. (See Page 43) Who are you trying to reach and what do you know about them.

The major portion of program development is outlining what happens to individuals who participate in the program. Those planning the new program or revising old ones must determine if the program is an individual, group, or community activity. This information will lead to the selection of a program technique suitable to meet needs previously identified. Program techniques are the method or methods, selected by an agency or organization, to deliver a program or service to a community or client

group. The Boy Scouts use small groups, Sweet Adelines use singing. (See Pages 44-45) In some cases, multiple techniques will be used in one program. A Respite Care Program for families of Senior Citizens might include counseling, field trips, programmed instruction, and/or lectures.

Simultaneously to the selection of program techniques is the determination of devices to deliver the services. (See Page 46) A device is usually a mechanical way in which a program or service technique can be delivered to a community or client group. A Nuclear Freeze group could present a panel discussion on television or radio or both. Multiple devices can be used by agencies and organizations to deliver programs.

An example of program revision would be the use of closed circuit television to deliver the Cadet Girl Scout program to handicapped youth living in an institutional setting. Instead of transporting the youth to an already existing troop, the troop comes to the client via television. The program is similar to that used in troops all over the United States, but television is used to bring instruction to the bedside. A volunteer in the institution assists the client. Existing program, new

delivery devices.

In most voluntary agencies and organizations, the key to the program delivery system is the individual. The volunteer is the person recruited to bring together various techniques with the client and/or member. Programs should be developed to support the person doing the job. Part of the marketing strategy for attracting volunteers is being clear about the expectations. Program planning is the focal point on what it is we want a volunteer to do to deliver our program.

PROGRAM DELIVERY

Name of Program:

Client	Age	Sex	Benefit

PROGRAM ASSESSMENT CHART

CLIENT	SERVICE	BENEFIT	RESOURCE SUPPORT	VOLUNTEERS

- \* newspaper - a form to reach client or service group with information about the program
- \* panel discussion - a group of citizens, experts who provide information; dialogue
- \* programmed instruction - a mechanized tool to teach skills or behavior such as computers, movies, video tapes
- \* radio - provide information, instruction, discussion on the radio
- \* role playing - asking clients to participate in a process where they gain some knowledge or experience through the use of acting out how someone might react in a program situation
- \* simulation - to recreate a situation as close to reality for clients or members to observe
- \* singing - providing a service to a community through singing or playing an instrument
- \* television course - teaching or presenting information in a video format

## PROGRAM PLANNING

### TECHNIQUES

DEFINITION: A technique is the method selected by an agency or organization to deliver a program or service to a community or client group.

- \* apprenticeship - an individual affiliating with expert or experts in a field or industry
- \* brochures - communicating information about the program through the use of informational pamphlets
- \* case study - using real or hypothetical examples to solve real problems
- \* community forum - large group meeting to achieve some end
- \* consultation - involving people in activities with noted experts in a field
- \* demonstration - presenting the information through showing others how it is done
- \* discussion - talking over a situation; dialogue
- \* displays - photography, graphics, art work designed to communicate the goals and aims of the program
- \* field trip - visiting a place to learn more about the program, its goals and aims
- \* intern - providing students the opportunity for learning inside the agency or establishing an intern program for agency/organization's volunteers to learn from others
- \* interview - having interviews conducted by people or having people in an organization interviewed
- \* magazine - provide information on a topic through printed format

DEVICES

for

PROGRAM DELIVERY

Definition: A device is usually a mechanical way in which a program or service technique can be delivered to a community or client group.

slide/tapes  
cassettes  
newsletters  
movies  
handbooks  
newspapers  
radio  
television  
puppets  
telephone  
posters  
brochures  
people  
samples  
kits  
games

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CHAPTER 5  
MARKET RESEARCH

CHAPTER 5  
MARKET RESEARCH

If the planning process of an agency or organization suggest program development or revision of existing program, the next step is to conduct market research in that area. The purpose of the research is to obtain information about two groups: 1) potential clients or members and 2) potential volunteers.

The committee and/or staff charged with the responsibility for this area are overlapping the work of the program development committee. It is ideal to combine the market research and program planning function into one group. They can use a two step market research process to begin the program planning process. (See Page 57) The plan should be written and shared with members of the committee. The first step is a series of questions that will establish information about clients and or members.

Client or Member Research

- a. What is the mission of this program/service?  
(See Page 58)
- b. Who are we offering this service to? How many will be served? How will we know when we have

served them? (See Pages 59-60)

- c. What will happen to the people we serve during the program/service?
- d. Why are we doing this program service? Are we clear about our intended objectives? Are others clear about our objectives?
- e. Where will the program/service be performed?
- f. When will it occur?
- g. How much will it cost to provide this service?  
The client or user?/the agency? (See Page 61)



If you developed a new candy bar to sell, you would need to know everything possible about that product and who your expected buyer (or market) is. This is part of the planning stage in any successful effort to provide a product, service or program. It begins before anyone is buying the product or service.

The second step in the marketing plan is the most important to volunteer recruitment. It is here that you summarize the strategy to achieve the mission of the

program/service.

There will be more volunteers as we move toward the year 2000, from a volume standpoint, but they will give less time to agencies and organizations. Thus when we look for volunteers we need to be able to tell them exactly what it is we expect them to do and the rewards and benefits they can expect if they join the volunteer effort of a program. This is done with a marketing plan in advance of the effort to recruit volunteers. You must know what you are selling in order to develop a sales plan.

- \* Examine existing resources.

- \* Are volunteers within the organization available to accept a new assignment?

- \* Can the current administrative structure support the program/service?

- \* Are the resources of the agency sufficient to support the new program/service?

The answers to these questions should be outlined for the marketing plan. People affected by the answers to these questions need to be included in the planning process. Adults respond poorly to decisions imposed by others.

\* Identify resources and volunteers necessary to achieve the mission of the program/service.

\* Where will the money be raised?

\* What building will be used?

\* Is there a local day camp site available?

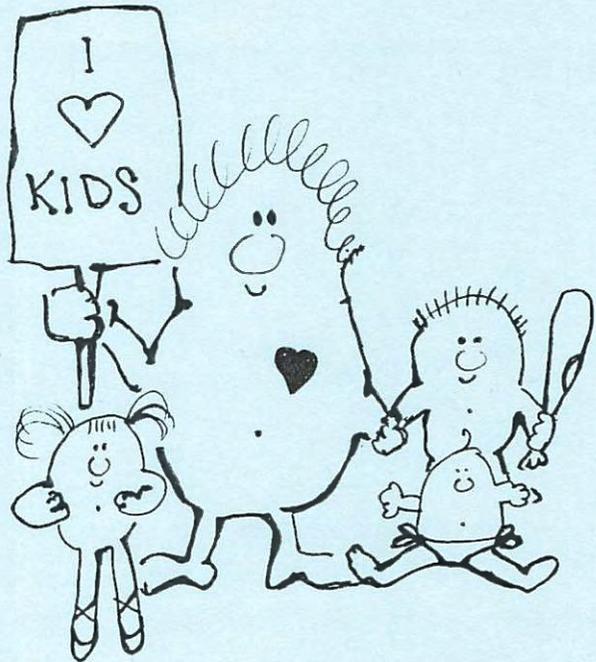
\* Could a church building be utilized?

\* Who will donate the rafts, canoes, clay, tools, etc.?

"Where will we find volunteers to run this program/service?" If the agency or organization has followed the steps outlined in this text the answer should be simple. By knowing what you want a person to do you can usually identify the type of person most likely to be attracted to volunteering for a specific program/service. For example, if a church is seeking teachers for youth classes, the best bet is with parents of the children. They become the target market of the recruiting effort.

Identify attitudes and behavior of potential volunteers. Once a target market has been identified, the next step is to learn as much as possible about the groups attitudes and behavior. Using the previous example, a church school committee could describe the

attitudes parents might have that would lead them to volunteer to teach a class. Parents often become involved in youth activities in order to spend more time with their children. That is a significant piece of information if you are wanting to recruit them.



To determine the attitudes and behavior of your target market, ask the following questions. There may be other questions depending on the program/service. These are the basics.

\* How do they feel about this program/service?

\* What attitudes would lead them to volunteer for our program/service?

\* What behavior do they exhibit that would be helpful to know in order to recruit them? Such as what clubs they belong to, what TV or radio stations they listen to, what organizations have their attention.

\* What is the most effective way to reach these potential volunteers? (See Page 62) For example -

personal contact, TV, brochure, newspaper, direct mail, etc..

Develop tools to reach target market of volunteers. When you have gathered the information, you develop the tools to reach those volunteers you wish to target or those resources you need to acquire. (See Chapter 7)

The best strategy is to review the marketing plan every six months. As voluntary agencies develop marketing plans, a few rules need to be observed.

a. Provide continuity.

Be sure you have a system that provides a continuous review of the marketing plan. If a committee of the Board of Directors oversees program areas then they need to have a continuity of membership (with individuals coming and going in an orderly process).

b. Keep it simple.

A marketing plan should be short and simple. Get someone to help who know how to write simple one sentence objectives that are measureable and observable. Be direct, clear and

brief!

c. Be flexible.

Be sure to build flexibility in your plan. It should be reviewed six months into the plan and at the end of each year. That is the time for revisions.

d. Coordinate with other areas of the agency.

All planning should be done cooperatively with staff and Advisory Committees or Boards of Directors. Nothing in a volunteer agency happens in a vacuum. The Program Committee may have a wonderful marketing plan that will require 35% of staff time. If a Capitol Fund Drive is being launched at the same time, it might necessitate a revision of plans.

e. Provide a system for measuring your objectives.

Some voluntary agencies/organizations have a facility for planning on paper and providing no control to see those plans are carried out. The marketing

plan should identify the control points  
and titles of persons responsible.

(The preceding steps adapted from FM 101-5, 14  
June, 1968, Department of the Army.)

David Hopkins says,

Perhaps the worst thing that can be done  
is to believe that marketing plans will  
either automatically fulfill themselves,  
or that they are necessarily the best  
plans. Continual rethinking and  
replanning are vital. (1977)

Agencies and organization with traditional ongoing  
programs may have difficulty in seeing this process as  
useful to existing programs. If a Girl Scout Council is  
launching a new program/service for handicapped youth, it  
is easy to see how this marketing plan can work. But  
what about the traditional troop program? The Council  
has been recruiting Brownies for a long time. Why  
change? The answer lies in demographics. Volunteers are  
harder to find. They stay with organizations for a  
shorter period. Traditional programs can be enhanced by  
using this same tool. A Montana Camp Fire Council used  
this approach to recruit boys and girls to a traditional  
club program called Sparks for kindergarten age.  
Volunteer members of the Recruiting Committee began by  
identifying their resources: current members, how many

recruiters, budget, etc.. Then they listed the resources they had that could be directed toward the recruiting effort, including available volunteer talent. The Committee knew they must reach parents of kindergarden children on a personal basis. They also knew parents would want to set the program in action to determine its suitability for their child. Once they did this market research, they brainstormed a variety of methods to reach parents. The Recruiting Committee mapped out who they wanted for club leaders and used a direct contact technique for recruiting. The results were dramatic, with a 150% increase in volunteers and children in one year!

Reviewing traditional programs/services is healthy! Just because an agency has done something the same way for 40 years does not make it the only or most effective way to do it. A completed marketing research plan should have some measureable goals and objectives. The committee of volunteers responsible for market research and analysis is in essence responsible for advising the recruiting team of strategies they feel will bring success.

## SIMPLIFIED MARKETING RESEARCH PLAN

### Client/Member Research

State the mission of the program/service in terms that are measureable and observable.

- a. What is the mission of the program/service?
- b. Who are we offering this service to?
- c. What will be done to the people we serve during this program/service?
- d. Why are we doing this program/service?
- e. Where will the program/service be performed?
- f. When will it occur?
- g. How much will it cost to provide this program/service?

### Volunteer Research

Summarize the strategy to achieve the mission of the program/service.

- a. Examine existing resources.
- b. Identify resources and volunteers necessary to achieve the mission of the program/service.
- c. Identify attitudes and behavior of potential volunteers.
- d. Develop tools to reach target market of volunteers.

\*\*\*\*\* Review marketing plan every six months \*\*\*\*\*

## MISSION OF YOUR ORGANIZATION

In one sentence, state the mission of your agency or organization.

Whom are you in business to serve?

Choose three (3) words that capture the spirit and essence of your agency or organization.



MARKETS: MASS AND SEGMENTED

A MARKET is any group or individual with whom you want to exchange something for mutual benefit.

List the major or mass markets of your organization or agency.

A MARKET SEGMENT is a sub-group with common characteristics.

List your current market segments.

Select new market segments that you would like to serve with your current or new product or service.

## ANALYZING THE MARKET

List the segments you have selected. Describe the segments and list their needs.

MARKETING SEGMENT	DESCRIPTION	NEEDS/ATTITUDES

## RESOURCE ANALYSIS

What needs does my organization have in order to complete this program or project?

What resources currently exist within the organization to help us do this program or project?

What conclusions would you draw from the data you have thus far collected?

WORK PLAN

Whom do you want to reach most?

With what key message?

How? Brainstorm all the possible methods and "star" the best ideas.

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CHAPTER 6  
JOB DESCRIPTIONS

## CHAPTER 6

### JOB DESCRIPTIONS

All volunteer positions within an organization should have job descriptions. We tell volunteers how we feel about their position by the professionalism we display in regard to that position. If we want to attract energetic, busy, professional people to our



organization, we must send a message loud and clear that we take the volunteer role seriously. A job description can be the first contact the volunteer has with the agency.

Volunteers of the '80's and '90's are short on time and long on demands for information. Research studies tell us that volunteers will want to know exactly what is expected of them, how long it will take, how they will be trained, and what qualifications they need to successfully do the job.

The volunteer job description is a good beginning. The description can be drafted by staff, or volunteers. (The most accurate job descriptions are compiled by

volunteers who actually do the job and staff who supervise those volunteers. A two hour committee meeting can produce the job description for most volunteer positions.

There needs to be a review process once the job description is complete. The Chairperson of an Advisory Committee or President of the Board and the Executive Director review the completed job description to make sure it complies with current standards and policies affecting volunteers.

The job description gives the basic information needed for Board members, receptionists, troop leaders, or a fund raising chairperson. It should include: title, narrative description of responsibilities, specific duties, qualifications, time, training and method of evaluation.

The job description is also a method of controlling the information that goes to a volunteer. If one person recruits another by suggesting that the "job is really nothing . . . an hour a month", the job description will dispel that image. Non-functioning volunteers are worse than no volunteers. By use of job descriptions the President, Executive Director, Program Director, and

Nominating Committee Chairperson know that recruited volunteers have the opportunity to read the "real" job expectations for a specific position. It is sometimes thought that job descriptions are useful only with volunteers who work for organizations like Hospice. Not so! If the job is worth recruiting volunteers, it deserves a job description.

If your organization has not been using job descriptions, you might consider the following approach. Establish a policy for the Board of Directors to require a job description before any new positions are created. Make it a goal to write job descriptions for current volunteer positions. For example: Complete job descriptions for 3 positions in (year). Thus the task is not overwhelming, but is being accomplished.

Job descriptions should be used prior to volunteer placement. Abbreviated forms of the descriptions can be included in recruiting literature or on radio or TV public service announcements. The detailed form can be available when potential volunteers inquire about a position. They can be used by members of the recruiting team or nominating committee as they talk with a person about the position. Job descriptions in files are

useless.

Agencies that go to the trouble to write job descriptions and treat volunteers in a professional manner should also consider revising agency personnel policies to bring the volunteers under its provisions. Like paid staff, the volunteers are acting for the organizations and are accountable to the same standards of behavior and ethics. Personnel policies can be drafted to include volunteers and to let them know policies and procedures affect them, except in areas related to remuneration and benefits.

Once the job description of the volunteer positions is in place, the next step is to find the people to fill those positions. A sound marketing strategy is aided by well crafted personnel policies and accurate meaningful job descriptions.

WORKSHEET ON JOB DESCRIPTIONS

Job Title:

Accountable to (supervisor, helper):

Description of responsibilities:

Specific Duties:

- 1.
- 2.
- 3.
- 4.
- 5.

Qualifications:

1. Age:
2. Education:
3. Experience:
4. Other:

Time Requirements:

Benefits:

Training Required:

## VOLUNTEER-STAFF TRAINER

### Information Sheet

Position: Area Trainer

Supervisor: Monitor (experienced, former trainer) and Club Coordinator

Hours: 50 - 60 hours during a year

Financial: Reimbursement money is available for mileage, and approved out-of-pocket expenses. (This would include child care costs)

Area: Trainers are needed as follows:

- Burbank area - 2
- Prescott/Touchet - 2
- Walla Walla/Dixie - 4

#### General

Description: Provide training for all leaders and assistants in a specific geographic area.

Duties:

1. Plan training sessions for Camp Fire club leaders in the assigned geographic area under the direction of the training monitors.
2. Conduct Basic Camp Fire Training and Camp Fire Awards Training for all leaders and assistants in the assigned geographic area.
3. Attend a training session once per year to learn how to be a Camp Fire Trainer.
4. Work with the Training Monitors to up-date and assess the needs of volunteers in the club program.
5. Agree to serve for one year from August 1 to July 31.

6. Submit bills and receipts to the Camp Fire office for out-of-pocket expenses incurred in the performance of your job as a trainer, i.e. mileage, approved long distance phone calls.

(Sample job description)

Copyright: Walla Walla Council of Camp Fire

## JOB DESCRIPTIONS

### Providing Job Descriptions in Agencies with on-going programs

1. Board or Advisory Committee policy on job descriptions
2. Write job descriptions for all new positions
3. Set goal to write or revise old descriptions (for example, 3 each year)

CHAPTER 7  
ADVERTISING AND PROMOTION

## CHAPTER 7

### ADVERTISING AND PROMOTION

When an agency uses a marketing approach to program development and volunteer recruitment, the job of a public relations committee is easy. In voluntary organizations public relations is often designed and carried out by staff and a public relations committee. They are responsible for posters, brochure, TV or radio campaigns, direct mail, slide or video presentations.

Job descriptions tell exactly the type of person being sought. The committee can use the job descriptions in connection with the program plan to develop full scale advertising plans.

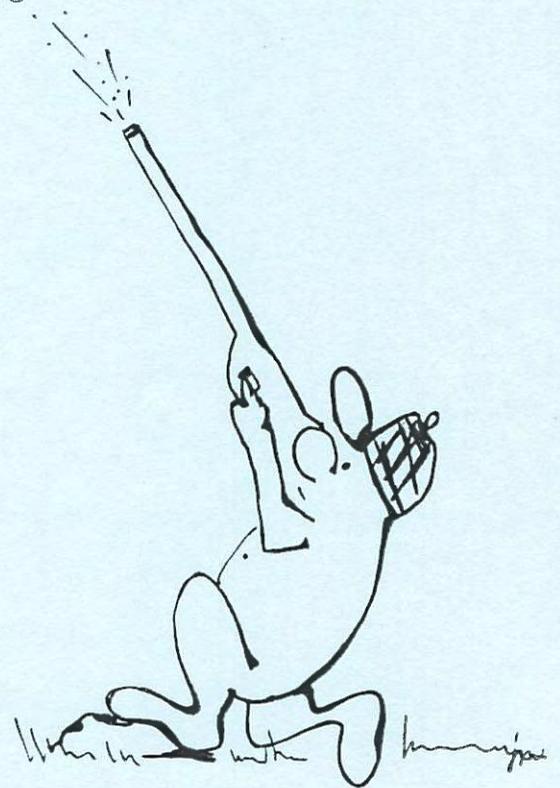
Product, Promotion, Placement, and Price are known as "the 4 P's" in marketing terminology. Knowledge of the 4 P's provides information that dictates to whom your Public Relations campaign is directed.

In the case of volunteer recruiting, product is both the program and the benefit you are selling the volunteer. Personal satisfaction is a benefit for most volunteers, but there are many others. (See Chapter 11) If you want a person to work as a volunteer counselor at a Family Planning Center, recruiting literature should



state the benefits of the program to the person. Some of those would be personal satisfaction, knowledge you are helping others in need, career experience, increased personal knowledge of medical aspects of family planning, learning to work with others, and opportunity for advanced training in a medical setting. Remember that different people are motivated by different things. The more benefits you identify the better chance you have of "selling" the volunteer opportunity to a potential volunteer.

Promotion is the techniques or strategies you will use to reach your potential volunteer (see Page 79). The days of global advertising are over. Voluntary agencies must target the people they want. They must seek out those volunteers at their home or club or through their favorite news station. Getting out the volunteer recruiting shotgun, aiming for the sky and hoping a pigeon will fall



out, shows a lack of respect for our programs/services and a lack of respect for the volunteers who work in them.

When a public relations committee plans a promotion or advertising campaign they should "target" the people they wish to reach. Using the program design and the job description, you can determine who is most likely to be interested in this volunteer job. For example, suppose a nursing home was looking for a volunteer to conduct musical activities for residents. A variety of effective techniques could be used to reach potential volunteers.

1. Brochures distributed through music stores, college music departments, music teacher associations, concerts, etc.
2. Radio spots on classical or easy listening stations.
3. Hand-bills on cars at concerts.

This method is called "target marketing". The idea is to go after those people who have the skills needed and might have an interest in offering their service.

Placement (as noted in the previous example) is where to locate the devices developed to reach the potential volunteer markets. Rock stations are probably not a good place to run Public Service Announcements, if you are trying to recruit senior citizens. The public

relations committee and staff must determine the most appropriate way to reach the target audience of volunteers.

Price, in a business context, is the cost of the product. When we use volunteer help, we rarely think of cost, but frequently there is cost to a volunteer who provides service to an agency. When an advertising campaign is developed, this expense must be a consideration. Such costs include: gas, bus, taxi, babysitter fees, registration, supplies, lost time to job, and/or membership dues. This information needs to be shared with the volunteers before they are recruited.

The job description provides information that should be included in advertising and promotion material. How many hours a week? A month? When does the job start and stop? Do you expect the person to serve year after year? This gives the volunteer their costs in time.

If a volunteer organization has separate public relations and recruiting committees, it is essential that staff provide communication links between the two committees. The recruiting team must successfully sell the potential volunteer on the benefits and opportunities. To do this they need to have good

information about the devices being used to recruit. The more consultation and shared information, the more ownership and commitment volunteers will have in carrying out their respective jobs.

ADVERTISING AND PROMOTION

TOOLS AND TECHNIQUES

Product: What product are we selling and how will it meet the volunteer's need?

- 1.
- 2.
- 3.
- 4.

Promotion: What devices can we use that will attract the volunteer to our product?

- 1.
- 2.
- 3.
- 4.

Placement: Where can we locate the devices we have selected so they will be seen by our targeted potential volunteer market?

- 1.
- 2.
- 3.
- 4.

Price: What is the cost in money and time to our potential volunteer?

- 1.
- 2.
- 3.
- 4.

## PROMOTIONAL DEVICES AND TECHNIQUES

### Techniques

Brochures - simple one page informational tract designed to impart information about a program or service

Bus/Subway cards - usually paid advertising for program or service on public transportation system

Hand-bills - one page flyer that is printed on one side, can be used on car windshields or as grocery bag stuffer

Posters - attractive large board with information about a program or service

Public Service Announcements (PSA's) - commonly used on radio and/or television to carry the message of program or service

Want-ads - request for volunteer help in the section of the paper reserved for volunteer organizations or "help-wanted" section

### Devices

Billboards - large displays to promote program or service

Direct Mail - information mailed directly to prospective clients or volunteers

Display booth - posters, pictures, and other items from a program to illustrate the service; placed in shopping malls, fairs, PTA carnivals, flea markets

Mobile information unit - a van or trailer with displays and extensive information about a program or service

Movies - opportunity to record actual program or volunteers in action, or use "star" to help sell program or service

Other volunteers - the single most successful method of recruiting volunteers

Races or competitive events (marathons, fun runs) - sponsor an event, produce T-shirts, get publicity to highlight a program or service

Radio - same as television

Restaurant tray liners - fast food restaurants use food tray liners which can be printed with the message of your program or service

Slide-tape presentation - scripted, electronically pulsed slide/tape presentation used in promotion of a program

Telephone - tool for contacting potential volunteers

Television - place to have interviews, PSA's, and/or special programs about an agency

Video-tape presentation - scripted, acted out presentation that promotes an agency program or service

Window displays - exhibits or program items in stores, especially effective when done once a year to promote special event of agency

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CHAPTER 8  
RECRUITING

## CHAPTER 8

### RECRUITING

Once the program plan is developed and job descriptions for volunteers are complete, select a recruiting team. The recruiting team uses the marketing plan to lay out a campaign for volunteer recruitment. (See Pages 85-86) The size of the recruiting effort is not a factor. If you are recruiting 3 or 300, the recruiting principles are the same. Recruiting after all "... is the art of persuasive communication." (Cooper, 1963)

When seeking individuals to recruit, look for:

- 1) Members of the organization.
- 2) People not in the organization who believe in and support your mission.
- 3) Members of the organization who would like to learn a new skill.
- 4) Parents or relatives of participants in your program.

People with sales experience or who are knowledgeable about sales techniques can make good recruiters. Recruiters should be selected by the same process as other volunteers. Have a job description. Target your

market. Ask people to do this job for a specific length of time. (See Chapter 5)

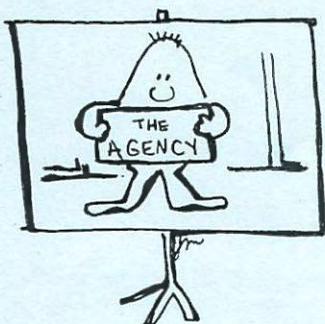
Volunteer agencies need to develop a continuous training and monitoring plan for anyone who recruits. (See Page 87) Your recruiters need:

1) A knowledge of the agency including the mission and purpose, services offered, and financial support.

2) Tips on sales pitch and persuasive communication, the benefits to the individual of volunteer opportunity.

3) Specific Information - job description and applications for the positions which the recruiter will be seeking volunteers.

If you want to generate excitement and enthusiasm for recruiting, learn about it by sitting in on a sales meeting for Mary Kay Cosmetics, Tupperware dealers, or an I.B.M. sales meeting. Recruit a person from their organization to help you design your recruiting campaign.



(Swanson, 1984) Professional staff can be the trainers, but this is a job that could be filled by a volunteer.

A simple slide-tape or vidio

tape presentation can describe the organization. A series of posters or overhead projections could provide recruiting tips. These training tools should be useable for 2 - 4 years. Updating is dictated by changes in the agency. (See Pages 89-90)

Do not assume that a volunteer who has been around for 20 years is knowledgeable about the agency. Everyone should receive the same basic training in recruiting. If recruiters return for a second year, adjust training for them.

## RECRUITING SALES FORCE PREPARATION PLAN

Questions that should be answered before launching a recruiting effort:

- 1) Is your recruiting campaign planned?
- 2) What kind of sales force is needed (number, sex, age, training, etc.)
- 3) Who will monitor the progress of the recruiting plan.
- 4) What types of supplies will each recruiter need?
- 5) Is a publicity campaign planned to help the public know about your effort?
- 6) Are there goals set for the number of volunteers to be recruited?
- 7) Do recruiters know the "territory" they must cover?
- 8) What is your budget?
- 9) If your agency has competitors, do you know what they are doing?

### IMPLEMENTATION OF THE PLAN

List all the tasks needing to be done. Assign the responsibility and agree on a completion date.

TASK	PERSON RESP.	START DATE	FINISH DATE	COMMENTS

## TRAINING THE RECRUITER

Be sure the following topics are covered as you plan your training for the recruiting sales force.

1. Explain the development of the program.
2. What are the benefits of the program to the volunteer?
3. Details of the program they need to know to successfully sell a volunteer opportunity.
4. Explain how your program is different from others that may seem similar.
5. Presentation of recruiting campaign.(literature, deadlines, publicity material, recruiting goals, areas to be covered.)
6. Explain system for reporting.
7. Share how you will keep the recruiters informed as the campaign progresses.
8. Training should be positive!

## TIPS FOR WORKING WITH VOLUNTEER RECRUITERS

1. Make sure they have adequate materials.
2. Keep in touch regularly with staff or chairperson.
3. Answer questions promptly.
4. Teach techniques so recruiters don't personalize the negative responses.
5. Do not ask people to do more than recruit.
6. Do something different at each reporting meeting.
7. Help them to know when to call for help and when to back off.
8. Help them avoid waiting until the last minute.
9. Help them avoid giving up.
10. Teach them techniques to avoid trying to do it all at once.

## KEY FACTORS FOR SUCCESSFUL RECRUITING TEAMS

### Clear Time Line

Recruiting campaigns need clear beginning and ending times. Volunteers and staff need to see a schedule and know clearly the meeting dates, deadlines, and reporting schedules.

### Advertising and Promotion

All publicity to support the recruiting campaign should be shared with recruiters. They need to know the timing as it will affect the recruiting activities. It is important for them to know dates of press releases, distribution dates for brochures, and informational meeting dates.

### Printed Material

The Recruiting Team needs a paper work support system. Examples might be: one page summary on agency and program, volunteer applications, job descriptions, brochures, schedules, etc.. This should be an attractive packet.

### Recruiter Meetings

Short reporting sessions for recruiters can be used to keep energy levels and enthusiasm high. Give awards and incentives at each session: "trophy" for dealing with the grouchiest person, applause for top recruiter, pencil for most improved. Meeting should be fun, up-beat, and filled with reports on progress and suggestions. Make sure they are short and at a convenient time for everyone. Always have new ideas and suggestions. Do not over do it. Information needs to flow both ways.

### Closure Event

Wind up the recruiting effort with a bang! Everyone receives recognition. Make it fun!



## Evaluation

Verbal and written evaluations could be part of the closure event. Everyone included in the process should be given the opportunity to evaluate and make suggestions for the future.

## SAMPLE RECRUITING PLAN

### Nominating Committee for Board of Directors

#### June-July: Marketing Plan

- \* who do we have on Board (age, sex, job, interests, skills, race, etc.)
- \* who do we want on Board (types, not names)
- \* where might we find these people - brainstorm sources, contacts, etc.
- \* what materials are needed to tell our story (current literature, application/information sheet, new items)

Completed by: entire committee, assigned staff.

#### July-Sept.: Recruiting Campaign

- \* staff and chairperson meet to discuss proposed campaign
- \* meeting to finalize names and prioritize
- \* staff completes plan for final approval by committee
- \* dates, time, places, etc.

Completed by: Chairperson, staff, total committee.

Sept.-Oct.: Training/Planning

- \* Committee trained for recruiting effort (as well as special recruiters, if needed)
- \* Distribution of recruiting packets
- \* Assignment of candidates to recruiters
- \* Explanation of reporting system so there is no duplication.

Completed by: Committee and staff.

Oct.-Nov.: The Campaign

- \* Recruiting of candidates
- \* Reporting meetings as needed

Completed by: Committee and chairperson

Nov.-Dec.

- \* Orientation of new members (if single slate)
- \* Completion of Record Keeping for following year follow-up
- \* Evaluation/Marketing Plan Review

Completed by: Committee, staff, chairperson, new Board members.

Dec.-Jan.: Election/Recognition

- \* Election/Installation of new officers
- \* Recognition of Recruiting Team at election

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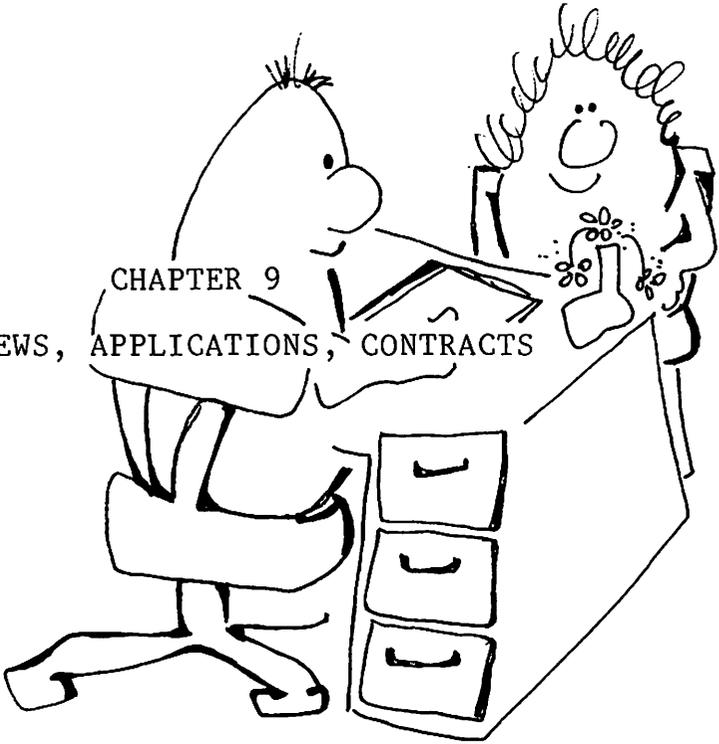
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CHAPTER 9  
INTERVIEWS, APPLICATIONS, CONTRACTS



## CHAPTER 9

### INTERVIEWS APPLICATIONS CONTRACTS

#### Interviews

It is not enough to ask someone to volunteer and make an immediate placement. Appropriate placements, screening undesirable applicants, skill assessments are all an outgrowth of the interview process. The recruiting team needs to be trained in the "art and science" of interviewing.

Volunteer interviews should have a double focus. First, what does the agency need to know about the volunteer to facilitate placement. Second, what does the volunteer need to know about the agency to decide if this is a suitable position for him/her.

The recruiter is seeking to learn more about a person and their interests. It is a time to discover the drawbacks that might exist to placement. Volunteer preferences can be determined during an interview. Training needs and potential limitations are another area of exploration.

The volunteer is getting to know the agency through the recruiter. They are learning about the goals of the agency and how it functions. The process should help the

volunteer to make an informed decision about placement. For example, how will their limitations affect our program. It helps them make a good choice. Having a volunteer "select" out is not necessarily bad. There is nothing worse than having a disgruntled volunteer doing a half-way job for an agency because there was not a meeting of the minds during the recruiting process. The interview is also the beginning of the training process for the volunteer.

Start by putting together the material for interviews. This should include a job description, brochures on the agency or organization, an organizational chart to show volunteer jobs in relationship to one another, copies of your annual report, and perhaps samples of work to be done. Each recruiter should have a ready supply of this material in an attractive package that the potential volunteer can take home. Part of what an agency is selling is its service to others and its management of that service. Volunteers want to be affiliated with agencies that do "good works" in an organized manner.

A four step interview process can be effective.  
(See Page 102)

1) Gain Favorable Attention. A friendly smile, an interest in the applicant (family, work, commitment, etc.) and an effort to help them feel relaxed.

2) Determine their interests. This is the time for direct questions related to the job and their qualifications or interests. Now is the time to move into indirect questioning (See Page 103) to get at values, interests. It is the time to listen.

3) Bring interest and benefits together. Here you repeat their interest and the benefits to them of participation in the program. Stay with the prospect and try to be personal. Use examples of other peoples experience.

4) The last step is to bring them into the picture. Approve of them and their choice.

Asking the right questions is a key component in conducting an effective interview. Your sales/recruiting team should have help in preparing for this part of their job. Direct questions that require yes or no answers are not effective in learning about a potential volunteer.

"Ask open-ended questions whenever possible as you



will learn more about how the candidate thinks." (Allison & Allison, 1984) In the open-ended style, the interviewer is acting as a catalyst. The candidate has much more control than in the direct question manner. This style of interview will provide greater depth of interviews and will reveal attitudes, motivation, and stability. The skillful interviewer will use silence effectively. You are looking not only for the right skills, but the right chemistry.

Some tips to help recruiters avoid making mistakes.

1. Know everything possible about the job.
2. Interviews cannot be rushed.
3. If you talk all the time you will not learn much about the volunteer.
4. Do not allow personal prejudices to rule decision making (elderly people can't do this job, for example).
5. Know exactly what you are looking for.

Let recruiters practice interviewing each other. Help them standardize an interview, so each volunteer is having a similar experience. (See Page 104) Use video tape (if available) to help them critique their own interviews. The more skillful the recruiters become at

interviewing the better the agency looks and the more impressed the volunteers will be.

#### Applications

Volunteer applications can be completed prior to the interview, during or following the interview. (See Page 105) This depends on the agency, the job, and the volunteer. This decision should be made in advance and agreed upon by those doing the actual recruiting.

A volunteer application has several purposes.

1) Provides basic information about the potential volunteer.

2) Becomes the basis of the Personnel File (more about this in Chapter 13).

3) It can be used during the interview to aid in questioning.

4) It is a source of information for additional checking on an applicant (references, special training, school back-ground). This is growing increasingly important. Clients of agencies need to be reassured that the organization has taken every step to protect them while in the program. That protection must extend to volunteers. Child abusers should be screened out before placement with a youth serving program.

5) The application can also be used for placement. It will help determine the best possible placement for a volunteer.

#### Contracting

Once a volunteer has accepted a job with an agency and completed the appropriate paper work, a contract should be issued. (See Page 106) This contract should spell out the time the volunteer is expected to stay with the agency, what the agency will do to prepare the volunteer for the job, and what is expected of the volunteer. The volunteer signs it and it becomes a part of their Personnel File.

Contracting with volunteers is a new concept for some volunteer agencies. It serves three primary functions:

- 1) Volunteer self-esteem is raised by the use of contracts. When an agency uses a contract, volunteers know their job is important and that they are taken seriously. Using the old "warm-body" approach (taking any "warm-body" who walks through the door as a volunteer) says a great deal to volunteers about the respect we have for their position. The more tangible efforts we make to indicate our respect for volunteers

and their position, the more the volunteer is apt to value their own position and produce the desired work. Contracts are a way of reinforcing the recruiting and interviewing process and sending clear messages to volunteers about the seriousness of our endeavor.

2) An agency clearly spells out its expectations in a contract. The volunteer should have an opportunity to suggest those things needed for him/her to complete their part of the agreement. (Special training, wheel-chair ramp at entrance) The contract can prevent future misunderstandings.

3) Closely aligned with #2 is the issue of protection. Volunteers do sue agencies. Clients sue agencies because of things volunteers do. Those cases are few but it is happening in America today. By spelling out expectations, training, beginning and ending dates, qualifications, we are protecting the agency in the event of a law suit. No one wants to talk about risk management, law suits, or insurance claims, but the reality is there. For protection the agency needs to build a thorough volunteer recruiting and selection process, including contracting, that will show the seriousness of the organizations efforts to recruit

capable volunteers.

## AN INTERVIEW PROCESS

1. Gain Favorable Attention
  - a. Exchange names
  - b. Smile
  - c. Be friendly
  - d. Show interest in them
  - e. Put person at ease
  
2. Determine their Interest
  - a. Ask direct questions
  - b. Qualifications
  - c. Use leading questions
  - d. Look for person's interests
  - e. Listen
  
3. Bring interests and benefits together
  - a. Repeat interest
  - b. Stress the benefits
  - c. Personalize
  - d. Stay at the prospects level
  - e. Use examples
  
4. Close with person in the picture
  - a. Personalize 'you' as the volunteer
  - b. Tell what is next
  - c. Appreciate them
  - d. Approve their choice

## ASKING THE RIGHT QUESTIONS

Note the difference

- |                             |   |
|-----------------------------|---|
| 1. How old are you?         | 1. What personal goals do you consider in choosing a volunteer job? |
| 2. Do you have children?    | 2. Tell me about your family.                                       |
| 3. What jobs have you held? | 3. What was the best thing about your last job?                     |
| 4. Are you married?         | 4. What type of work do you enjoy?                                  |

\* \* \* \* \*

### Non-directive Interview Style

- interviewer is catalyst
- interviewee has more control
- depth of answers is greater
- gets at attitudes, motivation, stability
- uses silence appropriately

\* \* \* \* \*

### Suggested Questions

1. What did you enjoy most about your last job? Least?
2. What do you enjoy as a leisure activity?
3. Tell me about your family.
4. What do you hope to be doing in five years?
5. What type of people do you enjoy working with most?
6. Describe your work habits.
7. What are important decisions you have made about your life?
8. What did you like best about your previous supervisor? Least?
9. What would be an ideal volunteer job for you?
10. How do you deal with anger - on the job and/or at home?

\* \* \* \* \*

## STANDARDIZE INTERVIEW

### Sample

Nominating Committee  
Board of Directors      Advisory Committee

1. Introductions
2. Reason for visit or phone call
  - a. Background on agency
  - b. Recruiter's position with agency
  - c. Volunteer job you want person to fill
    - 1) short description of job
  - d. Would like to discuss this position with you and why we need you!
3. Ask open ended questions
  - a. Samples
    - 1) what do you know about our agency
    - 2) have you been involved in positions with leadership positions
    - 3) what did you enjoy about those leadership positions
    - 4) are you interested in our organization and its leadership team
4. Are there any questions
5. Give or send literature - applications and brochures
6. Make arrangements for call back if necessary

VOLUNTEER APPLICATION

NAME ..... Day Phone .....

ADDRESS ..... Eve. Phone .....

Time Available for Volunteering .....

Special Time of the Year Available .....  
Usually Available:

Morning .....	Afternoons .....	
Evening .....	Weekends .....	
Hobbies	Interests	Skills
.....	.....	.....
.....	.....	.....

Past Volunteer Experience:

.....  
.....

Employment:

Company	Job	Supervisor	Phone
---------	-----	------------	-------

.....

Do you have health limitations which would interfere in the performance of this volunteer job? Yes ... No ...

Explanation:

.....  
List 3 non-family members who could provide references.

NAME	ADDRESS	PHONE
------	---------	-------

.....  
.....  
.....

CONTRACTING WORKSHEET

This contracting worksheet is for you to use as you draft a contract for your agency.

Job Title: .....

Name of Volunteer: .....

Address: ..... Phone: .....

Agency will provide:

.....  
.....  
.....

Volunteer Agrees to:

.....  
.....  
.....

Other areas agreed upon:

.....  
.....

Volunteer Responsibilities Begin: ..... End: .....

Contract Renewal Date: .....

.....  
Volunteer Date

.....  
Agency Staff Date

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CHAPTER 10

TRAINING

## CHAPTER 10

### TRAINING

Organization effectiveness can be increased by creating a climate that satisfies employee needs and at the same time directs their behavior toward the achievement of the organization's goal. (Hellriegel and Slocum, 1981)

This principle of business management is applicable in the volunteer setting. Successful management of volunteer programs can be enhanced by attention to the needs of volunteers and efforts to direct their behavior to meet agency goals. Like employees, volunteers are affected by the attention we pay to their needs and the quality of training we offer.

Each stage of adult development includes periods of time where individual needs can be met through participation as a volunteer. (For further information on Adult Life Cycles, see "Lifelong Learning: The Adult Years", October 1977) The period of initial contact with the newly recruited volunteer is the optimum teachable moment. If a volunteer is recruited by being told: "The job is simple. Just show up for one hour per month." This teaches the volunteer how serious the agency is about the job they do and what importance is placed on their contribution. When training is a continuous

process in an organization, volunteers expect learning to be part of what they do as long as they are affiliated with the agency.

Malcolm Knowles has written about the difference between adult learners and children learners. The chart on Page 119 briefly describes the fundamental differences between adult and children learners. Staff and volunteers responsible for managing volunteers programs, especially training, need a working knowledge of the principles of adult learning. (See Page 120)

With this background, how does an agency insure meaningful training to achieve agency goals. Training should begin with a training committee of staff and volunteers. It is critical to identify the needs of the learner. The best people to do that are volunteers who do the job for which the training is being planned. They act as surrogates for the newly recruited volunteers.

If we thoroughly analyzed the needs of learner population in the early stages of the design of our presentation, we would have a reasonably accurate set of assumptions about what they want and why. (J.B. Cornwall, 1981)

The Training Committee of an agency should be familiar with the principles and application of adult development and learning. The committee is then a

resource to the marketing committee and recruiting committee. To insure the knowledgeability of the committee it can be seeded with individuals who are adult education practitioners. Such people are found in Cooperative Extension at the local and state level and teachers of Adult Basic Education classes.

The initial contact with potential volunteers is a form of informal training that becomes the foundation of the more formalized orientation planned by the training committee. That is another reason for the importance of planning all aspects of a volunteer program.

The following elements are part of an adult development training program for volunteers.

A) Benefits of the service to clients (See Page 121)

The Gallop Poll asked volunteers in 1981 and 1983 why they volunteer. The most often repeated response (45%) lists altruism or meeting a real need as the primary reason for volunteering. If this is a motivation to volunteer, then information on the benefits of the service to the client should be explored. Youth development programs like 4-H or Boy Scouts, for example, teach young people citizenship preparation, personal

development, delinquency prevention, and skill development. Volunteers want to know the reasons why they are meeting needs. Don't assume this is already known by volunteers.

#### B) Mission and Purpose

A training session should review the mission and purpose of an organization. Volunteers with the best of intentions do not always understand the full mission of an agency. Red Cross is not just a disaster relief agency. Their mission and purpose takes them into such areas of service as teaching first aid, American Sign Language, and CPR. They also help teach children personal safety and work to make individual communities more safe. Every volunteer must understand the total purpose and mission of the agency. Volunteers are better ambassadors for the organization when they know the full range of services.

#### C) Facts on Clients

Part of training should be an overview of the clients served. Volunteers are interested in numbers and statistics. This gives them information to help them understand who the clients are they will be serving.



#### D) Key People in the Organization

This information can be shown by using audio-visuals. It is a painless way to cover the structure of the agency. By explaining the organizational structure, volunteers see themselves in relationship to the total organization and develop familiarity with names and titles of other volunteers and staff.

#### E) Tour of Facility

Volunteers should be shown the physical plant. A tour of the facility helps volunteers be totally familiar with where services are given, their own work site, and rooms they might use to meet with clients.

#### F) Paper Work

If volunteers are expected to complete paper work, they must be trained as to its importance and how it is completed. Volunteers frequently need to submit reports related to their work. To underscore its importance, trainers should clearly demonstrate how that information is used. Allow them to practice completing the forms in the safety of a training environment. This serves two purposes: 1) underscores the importance the

agency places on appropriate submission of forms, and 2) lets the volunteer begin to use jargon and language of the agency before they are actually placed. (This can most effectively be done using an overhead projector)

#### G) Housekeeping

Housekeeping is a broad term to cover the more personal side of volunteering. When adults enter a new environment their immediate needs are very basic -- where do I park and what will I do with my coat? An early stage of training should meet those housekeeping needs. Included are such things as parking, coat racks, secure location for purse or personal belongings, check in or out, work space, phone numbers, bathrooms, eating area, smoking area, etc..



#### H) Specific Job Training

When someone volunteers to be a telephone answerer on a crisis line they have immediate needs. They want to know what to do if a suicidal person calls. The

heart of volunteer training is job-specific. It is related directly to what the volunteer will be doing. It is best done by volunteers who have actually done the job and are trained to teach others and staff who will have supervisory responsibility over volunteers. The combination of paid staff and volunteers as a training team can be very effective.

The best teaching methods for specific jobs are experiential. (See Page 122) Volunteers learn best by doing. Trainers should use a wide range of participatory devices in training such as role playing, demonstrations, teams, practice, simulations, small group discussions, and personal assessment. Training should also be sequential. Volunteers can be overloaded with more information than they can absorb. It is best to present material then allow some time to elapse before presenting new information. On the average, studies show adults need to experience something nine times before it is fully functional. Providing specific training can be enhanced by spreading the content out over a period of time. It is best to allow the volunteer to practice what they have learned. They then return to the next training session with questions and a heightened awareness of what

they need to know.

#### I) Follow-up/Continuous Training

Organizations establish patterns in volunteer behavior that exist for the duration of the volunteer's affiliation. If volunteers expect on-going training to be part of their experience, they are more apt to attend sessions offered. Agencies establish informal expectations about training from the minute a volunteer is recruited.

On-going training must have relevance to the job the volunteer is doing. For that reason, current volunteers are the most appropriate people to identify needs and plan these events. They can sometimes act as trainers.

The agency should offer in-house education for volunteers and staff. This should be free or low-cost and conveniently scheduled to meet multiple schedule needs. In addition, the agency should send volunteers to training of a more general type. This is provided in many local communities by volunteer agencies. Professional organizations also offer training. Besides reaping the benefit of training, the volunteer who has his/her way paid to a training session will benefit from

knowing the agency values their service enough to pay for further training. It is wise to set aside a portion of training dollars for volunteer expenses.

Some agencies will also need to establish regular support groups for volunteers. While this is not the formal classroom training, it is nonetheless an important key to volunteer development and learning. Hospice volunteers, for example, need a place to discuss the emotional aspect of their job. A monthly support group meeting for small numbers (8-12) of volunteers can be effective. The group should set its own schedule, have a convener, and a meeting format for each session, and staff support, if appropriate.

#### J) Evaluation

Each formalized training session should be evaluated immediately. (See Page 123) Telephone evaluations of randomly selected volunteers by members of the training committee can be conducted several months after training. (See Page 124) These two methods help in planning future training sessions and also help ascertain the absorption level of the material covered.

#### K) Manuals

Volunteers can use information in a written

form in manuals. The manual can contain such things as policies, job descriptions, program descriptions, background on the agency, sources of additional information about the volunteer job, and a volunteer evaluation form. The manual should be attractive and have a cover prominently displaying the logo and name of the agency. When revisions are made, current volunteers should receive revisions or a new manual. They must be up-dated and reviewed, preferably by volunteers, at least every other year.

#### L) Audio-Visuals

Volunteer agencies need to expand their use of audio-visuals. Adults in our society are bombarded daily with slick, professional graphics and visuals. People expect a snappy good looking presentation whether someone is selling refrigerators or teaching us about a volunteer job. Much training time could be saved through the use of audio visuals.

- \* Background on agency and clients on videotape for volunteers to take home

- \* Slide-tape presentations for initial orientation to agency.

- \* Videotape volunteer and client in real situation.

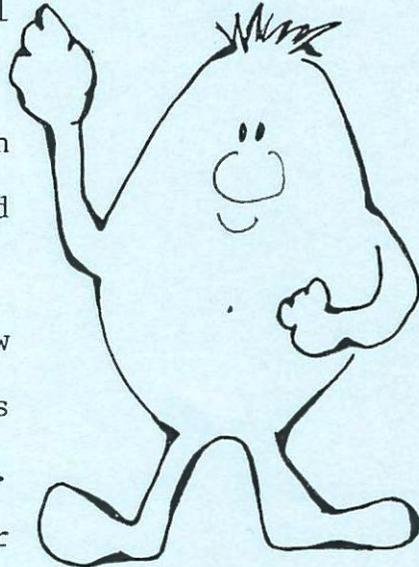
Make the tape available at training sessions and for those with VCR's.

\* Put forms and reports on computer discs. Volunteer can then do reports on home computer.

\* Colorful posters and visual aids for all training encounters.

\* Create an agency cartoon character for use in all training and media contents.

These are only a few examples of the wide range of uses for audio-visuals as training tools. This is also an excellent area for volunteers to shine. Recruit and train audio-visual specialists. Let them form a committee, with staff support, to develop new and exciting audio-visual tools for use in the agency.



Andragogy assumptions by Malcolm Knowles:

4 main differences between the learning process of children and adults:

Changes in:	Children as Learners	Adults as Learners
Self-Concept	Passive, dependent, Seek extrinsic reward, Receptors of knowledge, Judged by others	Self-directing, Depend on self, Rewards intrinsic to self-purpose, Active by choice, "Now" oriented, Judged by self.
Role of Experience	None or limited.	Has a growing reservoir as a resource for learning. Establishes self- identity and has deep value. Relate old experiences with new for learning. Promotes experimental learning.
Readiness to learn	Part of physiological and mental maturation. Academic pressure.	Oriented to develop- mental tasks of social roles. Time learning exper- iences with these developmental tasks.
Orientation to learning	Postponed application, Subject-centered, Accumulation of material for later application.	Immediacy of applicati Problem-centered, To improve ability to deal with life problem NOW, Coping with current life problem.

"Andragogy: An Emerging Technology for Adult Learning" Chapter 3 from  
Malcolm S. Knowles, The Modern Practice of Adult Education--Andragogy vs.  
Pedagogy, 1970

## ADULT INFORMAL EDUCATIONAL GENERALIZATIONS

Definition: Adult education is the process through which adults have and use opportunities to learn systematically under the guidance of an agency, teacher, or a leader. It is a continuing cycle of planning, conducting, and evaluating learning activities for adults. It requires guidance by a trained teacher or leader. It is concerned with purposeful guided learning.

1. For an adult, few experiences are new. He fits new information into his organized body of ideas about society.
2. Adults have likes and dislikes with dislikes getting stronger with age.
3. Many adults doubt their ability to learn.
4. While the ability to learn is not impaired with advancing age, physical things may affect it.
5. Adults are extremely sensitive to failure in the learning situation.
6. Adult learners are almost always part-time learners and the voluntary nature of what they do needs to be acknowledged and respected.
7. Adult learners expect the answers they get to be correct and work.
8. No matter the class taken, the adult learner believes it will fit into his daily life.
9. There will be a wide variance in student's age, experience, motivation, and goals.
10. The instructional strategy must be made to fit the learner, not the learner to the strategy.
11. An understanding must exist that learning is a slow, evolutionary, undramatic undertaking that can be harvested only after many years of constructive efforts.
12. Those who are affected by training decisions should have a share in making those decisions.
13. Leadership in an informal situation should be shared.

PROGRAM BENEFITS

PROGRAM/FEATURES

VOLUNTEER BENEFITS

1.

1a.

1b.

1c.

2.

2a.

2b.

2c.

3.

3a.

3b.

3c.

4.

4a.

4b.

4c.

5.

5a.

5b.

5c.

6.

6a.

6b.

6c.

7.

7a.

7b.

7c.

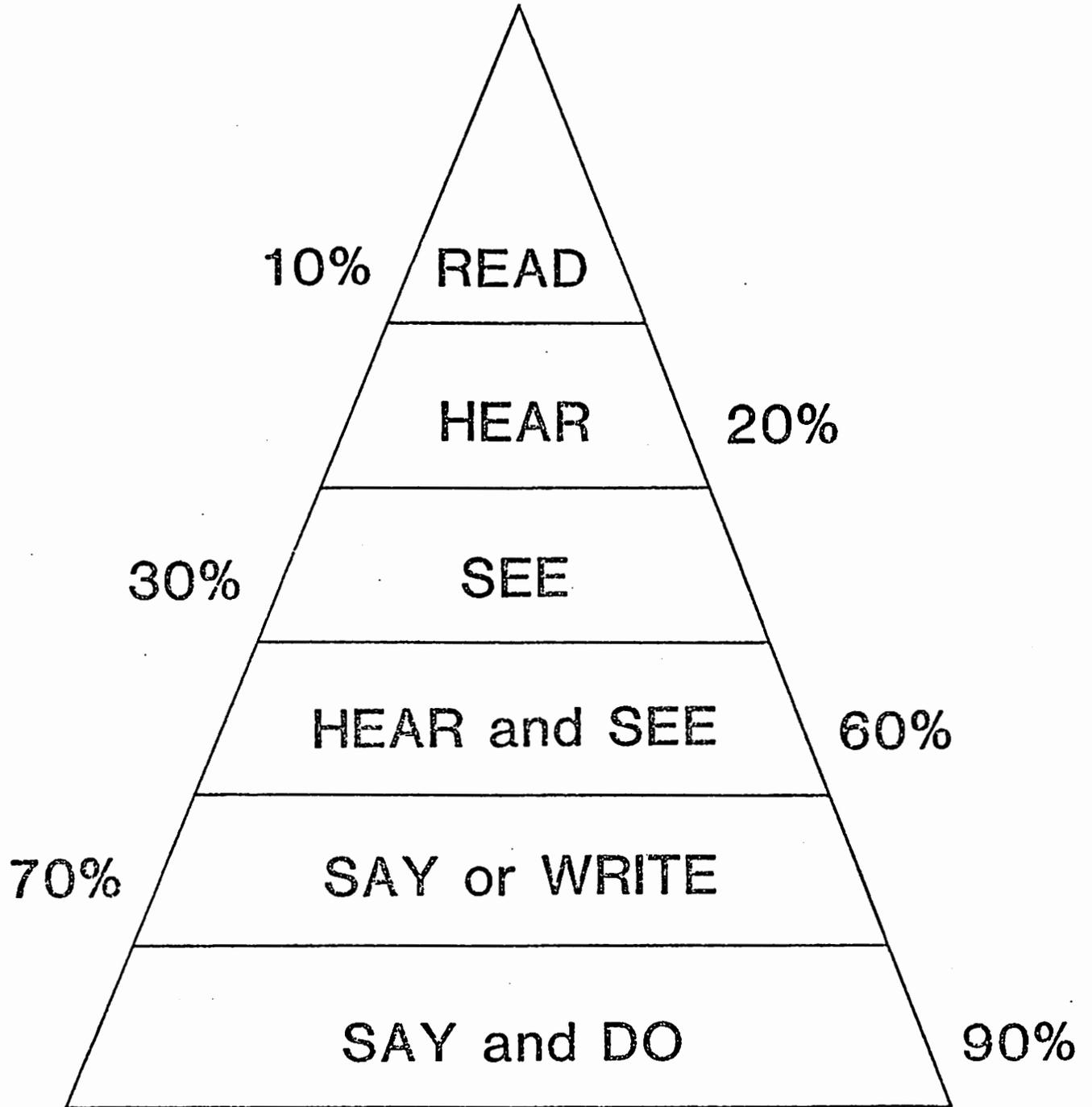
8.

8a.

8b.

8c.

DALE'S "CONE OF EXPERIENCE"



# WORKSHOP FEEDBACK SHEET

PLEASE CIRCLE THE APPROPRIATE ANSWER.

THE WORKSHOP WAS . . .



VERY HELPFUL



SOMEWHAT HELPFUL



NOT VERY HELPFUL



USELESS

THE LOCATION AND TIME OF THE WORKSHOP:



GREAT!



OKAY



YUK!

WHAT THINGS DID YOU FIND MOST USEFUL IN THE WORKSHOP? \_\_\_\_\_

WHAT DID YOU FIND LEAST HELPFUL IN THIS WORKSHOP? \_\_\_\_\_

WHAT IMPROVEMENT WOULD YOU SUGGEST IN THIS WORKSHOP? \_\_\_\_\_

WHAT OTHER COMMENTS WOULD YOU LIKE TO SHARE? \_\_\_\_\_

## VOLUNTEER TRAINING EVALUATION

1. Did you find volunteer training helpful in the carry over to actual work? How?

2. What was most helpful? List please.

3. What was least helpful? List please.

4. List lecture, activities, and discussions not included which would have been helpful.

5. Was time adequate for training?

6. Do you have suggestions for the organization and content of future training? Please list. Feel free to make any suggestions and criticisms which will be of value in the future.

Interviewer:

Date:

## TRAINING/ORIENTATION WORKSHEET

1. Introductions to key people
2. Tour of Facility
3. Housekeeping - bathrooms, lunch room, coat rack
4. Time for questions
5. Paper work - applications, handbook
6. Training for a specific job
7. Follow-up/monitoring
8. Evaluation
9. Recognition

PRINCIPLES OF TRAINING

IF PLAN DEVELOPED WITH THE TRAINEE PARTICIPATING --  
TRAINING GAINS IN SIGNIFICANCE.

---

JOB OR ACTIVITY	WHO WILL DO THE TRAINING	WHEN IT WILL BE DONE	HOW	WHERE	REMARKS
--------------------	-----------------------------	-------------------------	-----	-------	---------

---

Page 126

1 .

2 .

3 .

4 .

5 .

6 .

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CHAPTER 11

MOTIVATION

## CHAPTER 11

### MOTIVATION

Motivating volunteers is one of the most important jobs facing people who manage volunteer programs. Organizational effectiveness is directly affected by the morale of volunteers and staff.

Motivation is a critical element to successful volunteer management. But experts in motivation have a difficult time agreeing on a definition. Motivation is like learning. You can not see it or hear it, but when it is not present, you know it. Motivation, like learning, happens in the head of a volunteer. It can only be measured by external factors. The presumed effects of motivation include performance, productivity, attendance and turnover of volunteers. To measure the motivational climate, agencies need to keep statistics on retention, length of service, or absenteeism. These benchmarks can monitor the motivational climate and signal the need for change.

If motivation of volunteers is such an elusive commodity, how can a manager influence it? The initial motivation for volunteers is satisfied by affiliation with an agency. If volunteers are interested in

improving the services for animals, they become a Humane Society volunteer. Once they are affiliated, a new group of motivating factors come into play. Most volunteers list the following areas as things which make their volunteer placement satisfying.

#### Involvement in the Decisions

Volunteers function well when they are included in the decision-making process. When decisions are imposed by paid staff, without consultation, a negative motivational climate exists.

#### Appreciation for Job

Employees and volunteers agree that supervisors are not generous with praise. Repeated studies have shown that children and adults respond best to praise. If you want to change behavior, start by praising the person when he/she exhibits even a glimmer of the desired behavior.

For volunteers this is smiles, thank you, notes, and praise in newsletters.



#### Responsibility and Authority

Volunteers sometimes have responsibility for a job, but not authority to make decisions. The best volunteer

managers are delegators who give volunteers authority and responsibility. If a volunteer receptionist must check every phone call or client contact with paid staff, he/she is a liability to the organization. Properly trained, with clear written policies and procedures, the volunteer can take the responsibility for client contact and the authority to field problems, within the framework of agency policy. The volunteers self-esteem is enhanced and they are not a nuisance to paid staff.

#### Assistance to Complete Job

Volunteers need to feel an on-going support for their task. Paid staff spend 6-8 hours, five days a week thinking about the agency, its goals, clients, services, and volunteers. Most volunteers spend a few hours a month devoting their energy to the agency. For that reason, staff needs to support them as they carry out their task. There is a fine line between support and staff "take-over". Volunteers need to know there is a "safety-net" of staff support for their efforts, but they need to fly alone with guidance from staff.

#### Interesting Work

Even the most menial volunteer jobs can be made interesting. Mass mailings can be a social occasion with

coffee and treats. An explanation of the purpose for the mailing helps volunteers see its value in the larger context. Bored volunteers doing rote tasks are unlikely to stay with an agency.

#### Opportunity to Grow

Volunteers, who start out in the low rung of agency service, need to see "career paths". There must be opportunities to make a bigger contribution to the organization. A 4-H volunteer might begin with a youth club, then become a member of the training committee, moving to a leadership role on the County Advisory Committee. There is the challenge of new jobs, new people, larger tasks, and an opportunity to influence decisions.

#### Loyalty of Supervisor

Volunteers need to know that their supervisor believes in them and the value of their contribution. The supervisor conveys in words and actions the value they place on volunteer efforts. If the manager of the volunteer program places people under the supervision of others, then those individuals must be trained. Any staff who supervise volunteers should have supervisory training. Volunteers leave agencies because they feel

their contribution is not really valued.

#### Good Working Conditions

Agencies who use volunteers need to provide a place for them to work. Volunteers will not be comfortable taking staff work space. They also have a clear demonstration of how seriously the agency feels about their role, by the space and resources devoted to it. Volunteers do not expect their own work area, but a "volunteer desk" or office shared by all volunteers can be an inexpensive solution.

#### Evaluation

Contrary to popular myth, volunteers do want consistent and fair evaluations. Volunteer should have the opportunity to assess their own performance and then discuss their supervisor's evaluation of their work. The object should be growth and not criticism. It should be continuous feedback, verbally and written. (See Chapter 13)

Agencies can monitor the motivational climate. A periodic review of the opportunities provided to volunteers will assist in correcting problems before they affect the program adversely. (See Page 136)

If the agency experiences high turnover, or high

absenteeism, or other signs of low morale, it should take immediate steps to enhance the motivational climate. (See Pages 137)

Begin by listing the project or activity where there is a problem. If specific volunteers are losing their enthusiasm, they would be listed also. Rather than dwelling on why, the volunteer managers should seek techniques to enhance the motivational climate.

It is important to be specific in the effort to reach a solution. If absenteeism is high at training sessions and client contacts are suffering as a result, what can be done? Solutions might include a task force of volunteers to review the training plan, establishment of a volunteer buddy system (rather than formalized training); or offer the opportunity for volunteers to change jobs. There is no such thing as the "status quo". People, agencies and programs are either going forward or backward. There is no such thing as standing still. An acceptance of that in relation to the motivation of volunteers will help managers provide on-going growth activities to enhance the morale of all volunteers.

Staff play an integral role in the motivational climate of organizations. With the increased use of

volunteers by public, private and governmental agencies there has arisen a new method of operating "volunteer" programs. Some volunteer programs are really only using volunteers to provide "free labor" to achieve agency goals.

"Staffication" is the process whereby staff members hold all authority. They make decisions about goals, direction, training, and recruiting. Volunteers rubber stamp staff devised budgets and projects. The programs are volunteer in name only. Volunteer managers are essentially recruiters of bodies to provide services formerly provided by paid employees. Volunteers are seen as a solution to budget cutting and curtailed programs.

The death knell of a volunteer program can be sounded by the degree of "staffication" that exists. Volunteers want ownership of programs, goals, and direction. The more ownership, the more highly motivated they are to provide service and leadership.

The role of staff in a volunteer program is to be constantly striving to work yourself out of a job. The theory being, the more a volunteer manager enables volunteers to control and direct their own destiny, the more highly motivated they are. Staff need to perceive

the program as belonging to volunteers. This makes the volunteer the pivotal person in the development of the program.

If someone hires an interior decorator, they are asking for professional assistance in landscaping the environment of their home. The home owner expects research, suggestions, fresh ideas, and professional judgement from the decorator.

The same is true for staff who manage volunteer programs. They are a key part of the process, but decision making should lie in the hands of the volunteers. The most successful agencies are those that stamp out "staffification".

### MOTIVATIONAL CLIMATE EVALUATION

Below are listed the primary motivational factors that keep volunteers happy. Opposite each item is a space to indicate, specifically, how your agency provides this factor.

Motivator	How provided in agency
1. Involvement in decisions	
2. Appreciation for volunteer job	
3. Responsibility and authority	
4. Assistance and support	
5. Interesting work	
6. Opportunity to grow	
7. Loyalty of supervisor	
8. Good working conditions	
9. Evaluation	

ENHANCING THE MOTIVATIONAL CLIMATE

A. List below a project, assignment, committee, or section that does not appear to be motivated. List volunteers who are involved in this area. Do not complete the third column yet!!

Project/Activity	Volunteers	Action to Improve Motivation

B. Below are listed some ways a volunteer manager can enhance the motivational climate. Put a check mark by the ones you think apply in the situations you have listed above.

- Participate in goal setting, planning, decision making
- Give fair and consistent feedback
- Give credit
- Help volunteers see big picture
- Delegate units of responsibility and authority
- Keep volunteers informed about things affecting their job
- Make time to listen to volunteers
- Welcome diverse opinions with warm approval
- Be open and candid with employees
- Use aptitudes of volunteers
- Provide forum for volunteer publications/creations
- Encourage job rotation
- Support efforts to obtain education
- Encourage membership in professional organizations
- Plan recognition and award program

C. In the third column write at least one SPECIFIC action you can take to implement a better motivational climate in your agency. Use the items in Part B to help guide you. For example, if you listed "Help volunteers see the big picture", and one of the volunteers is working on a project involving several areas of the agency, one specific action might be to include them in the next project review meeting. You could write, "Include Bob in the next project review meeting."

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CHAPTER 12  
SUPERVISION

CHAPTER 12  
SUPERVISION

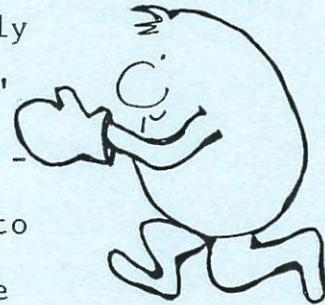
Volunteers are amazingly like paid staff in their attitudes toward supervision. When employees are asked for the factors they appreciate in a supervisor, they list such things as fairness, being consulted, being included in decisions, being taught my job, and knowing the expectations. Volunteers asked about ideal supervision list the same qualities. Supervisors, when surveyed, place a much heavier weight on salary, job security, and benefits as employee motivators than do employees. Like volunteers, paid staff want to do a job they believe in, and participate in the decision making process. Japanese companies operate facilities all over America that use supervision techniques based on what employees say are motivating factors. Their success is unquestioned in the annals of business.

Managers of volunteer programs need to review the attitude surveys of volunteers and paid employees. The similarities are striking. When volunteers are accorded a positive supervisory style, the motivational climate is enhanced and paid staff and volunteers perceive themselves as being treated equally.

Equal treatment is a method of professional supervision. When volunteers are treated in a professional manner, they tend to become more professional. They see themselves as part of a professional team and not merely free labor. The volunteers self-esteem is enhanced. When people feel good about themselves and the work they do, their productivity is increased.



Volunteers are really then "volunteer-staff" Volunteers work "hand - in - glove" with paid staff to achieve the goals of the



agency. The two groups can be mutually supportive. The spirit of team work and high morale is dependent in large measure on the style of supervision. The management team of a volunteer agency will convey its attitudes to paid staff and volunteers through its perception and application of management principles. Individuals with direct supervisory responsibility should be trained. Training volunteer supervisors and paid supervisors together says a great deal about the agencies philosophy of supervision. It can also build the team spirit.

The qualities of a good supervisor can be identified. That person needs to be a hard worker. Enabling others to do their best requires a genuine interest in other people. It includes having patience, tolerance, sympathy, and loyalty. Good supervisors are tactful folks who are cooperative, dependable, and democratic. Usually they go overboard to be objective and impartial.

Enthusiasm, imagination, and a sense of humor are common characteristics of good supervisors. They apply common sense to problems and welcome constructive feedback to improve operations. They also have a high degree of integrity.

No one supervisor has all these traits. When possible, they supplement their skills by bringing in other staff or volunteers who complement their characteristics. That is team building at its best. (See Page 149)

The characteristics of a good supervisor are part of their personality. There are, however, principles of supervision which can be learned, measured, and improved. (See Page 150)

## Volunteers Must Understand What Is Expected Of Them

Volunteers need to have a full understanding of the organization and how it works. They especially need to see themselves in relationship to the whole -- like those maps in shopping malls that show the entire complex with an arrow that says "You Are Here". The volunteer needs to understand "where they are".

Volunteers most immediate needs are related to the job they will be doing for the agency. If a volunteer has been asked to serve on a Board or Advisory Committee, there should be an orientation session to help them understand their job and the expectations staff, clients and other volunteers will have of them.

Once the volunteer understands the job, they need to be told how the quantity and quality of work will be evaluated. Good supervisors should never let volunteers guess how they will be evaluated. There should be no surprises. Good supervisors spell out the training program available and the growth opportunities for volunteers.

## Coaching

Modern American businesses are using a new term to describe the ongoing guidance people should have in their

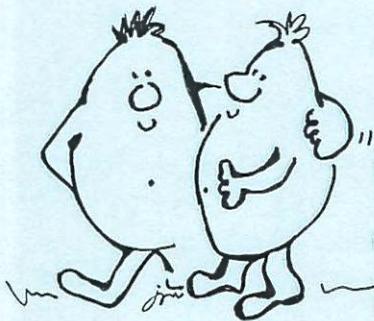
work. Coaching is used to describe the process of continually providing information, offering techniques to do the job more effectively, and steps suggested for improvement.

In this context coaching is used to describe the encouragement and direction that is similar to parenting. It is an apt word to describe the supportive nature of supervision.

#### Recognition

This is the one principle of supervision done least well by supervisors, when rated by volunteers and staff.

Most agencies are good at formal certificate and award programs. It is the small thank you's and pats on the back, for a specific job, that are the most meaningful. (More about this in



Chapter 14)

#### Constructive Criticism

Volunteers want to do a good job. They appreciate hearing from supervisors how to correct mistakes or improve on new skills. Adults are more apt to change through a process of positive suggestions, rather than negative. Supervisors need to find ways to give support

to desired behavior and to let volunteers know when their behavior is not up to standard. If a volunteer is chronically late, the supervisor could start by suggesting a schedule change. If that fails then have a conversation about the problems causing the delay. The supervisor is focusing on the problem, but not shaking a stern finger at a hapless volunteer.

#### Opportunity For Growth

Volunteers need to be advised by the supervisor about growth opportunities within the agency, including employment. Supervisors should offer volunteers the opportunity to try new things. For example, the manager of the volunteer programs is establishing a short term task force to evaluate recruiting. The supervisor might recommend one or two volunteers to serve on that committee. If that is successful, the volunteer could become a member of a standing committee.

Some volunteers are happy doing one job. Do not rush a volunteer to a new job until they are ready. Provide opportunities and freedom to tell you no. Good supervisors persuade, not coerce.

#### Safe And Healthy Environment

All volunteers deserve to work in a safe and

healthy environment. Good supervision requires an attention to lighting, ventilation, and equipment. It is critical that safe working conditions prevail.

Supervisors of volunteers should periodically evaluate their skills. (see Page 151-155) This can be done through self-testing, standardized tests, use of consultant, or by taking classes. An honest appraisal of skills can lead to developing an improvement plan. Supervisors who want to improve their skills need to write measureable objectives. (See Page 156) These should be checked periodically.

Another evaluation of supervision can be performed by volunteers. (See Page 157) Ask them to rate supervision. This will point out areas needing improvement by the people who are affected by the supervisor.

#### Tips for Supervisors (See Page 158)

1. Know all you can about your volunteers.

The more you know about their strengths and weaknesses, the better your ability to supervise. Outside factors have a way of interfering with the volunteer job. A knowledgeable supervisor can help volunteers with problem solving, but

only if they know what is going on!

2. Learn to give orders.

Good supervisors find ways to clearly outline their expectations. They are clear. The goals should be measureable and observeable. This needs to be done directly, but in a non-authoritarian manner.

3. Ask volunteers to help.

Getting help from volunteers starts with asking. The more informed volunteers are about the entire operation, the better chance of getting help. They need to be involved in problem solving and even encouraged to dissent. Supervisors learn the most and make the best decisions by exploring all facets of an issue.

4. Make decisions.

Do not stall decision making. Devise a logical sequence of information gathering and opinion testing. Then decide. If you make decisions promptly you can change direction if the original course of action proved incorrect. The longer decisions are delayed, the less flexibility for change.

5. Settle grievances.

For most managers of volunteer programs, settling grievances is the most difficult supervisory problem. It is especially difficult when two volunteers, or staff and a volunteer are in dispute. The good supervisor is objective. First, gather the facts. Get the best information from the most impartial people. Second, follow agency policies. Sticking with written policies can save heartache for everyone. The supervisor needs to move as quickly as possible to a solution. The faster you reach resolution, the sooner the volunteers and staff can return to providing client services.

6. Deal with problem volunteers.

Start by checking your own supervisory techniques. What do you know about the volunteer? Do your volunteers know what is expected of them? Have you talked about the problem? Have you explained how their behavior affects the clients and the whole organization? Avoiding the problem is like setting a time bomb in the front lobby for everyone to see! The bomb

becomes the topic of conversation instead of services to the clients. It will blow up eventually and then the supervisor has lost control.

7. Maintain a sense of humor.

There are few problems in the world that will not benefit from a sense of humor. Even if you are not endowed with a generous sense of humor, look for what is amusing in any problem situation. Knowing when to be serious and when not to be, relieves stress and tension for volunteers and staff.

## THE ART AND SCIENCE OF SUPERVISION

### A Good Supervisor Should:

1. Know that leading is hard work
2. Be interested in people
3. Have patience
4. Have sympathy and tolerance
5. Be loyal
6. Be accepting of constructive criticism
7. Be tactful
8. Be objective and impartial
9. Be dependable
10. Be cooperative
11. Be democratic
12. Keep a sense of humor
13. Be enthusiastic
14. Use imagination
15. Apply common sense
16. Have integrity

## PRINCIPLES OF SUPERVISION

1. People must always understand clearly what is expected of them.
  - a. What does the organization stand for; how does it work
  - b. What is the volunteer's specific job
  - c. How will the quantity and quality of work be evaluated
  - d. What will the training program be
  - e. What are the career opportunities
2. Coaching
  - a. Provide information
  - b. Techniques to do the job better
  - c. Personality improvement
3. Good work should be recognized
4. Poor work deserves constructive criticism
5. People should have the opportunity to grow
6. People should work in a safe and healthful environment

\* \* \* \* \*

### Supervision Skills Inventory

Directions: Think about your skills. Rate yourself honestly.

#### TOPIC

VOLUNTEER DEVELOPMENT	<i>always</i>	<i>sometimes</i>	<i>rarely</i>	<i>working on it</i>
1. Develop/use clear job descriptions				
2. Recruit appropriate people for jobs				
3. Fair/effective interviewing				
4. Standardized interview				
5. Provide coaching/supervision process on on-going basis				
6. Evaluate performance regularly				

#### PLANNING

7. Set goals that are measureable				
8. Set objectives with people that are achievable and challenging				
9. Involve people affected in planning process				
10. Develop back-up plans				

TOPIC

*always*      *sometimes*      *rarely*      *working on it*

11. Integrate budget and planning				
12. Anticipate problems				
13. Regularly evaluate plans.				

ORGANIZATION

14. Coordinate functions of various areas of organization				
15. Delegate tasks				
16. Analyse and direct work flow				
17. Try to improve or simplify tasks				

DECISION MAKING

18. Participate in problem solving process				
19. Seek opinions of others in problem solving				
20. Solve problems early.				
21. Establish criteria for making decisions				
22. Make decisions promptly!				

COMMUNICATION

23. Speak clearly and concisely				
---------------------------------	--	--	--	--

TOPIC

always  
sometimes  
rarely  
working on it

24. Encourage participation by others				
25. Listen				
26. Don't make assumptions too quickly				
27. Write with clarity				
28. Understand roles of people working in groups				
29. Compromise				
30. Mediate				
31. Analyse group behavior				
32. Sensitivity to personal feelings				
33. Control dysfunctional behavior				
34. Understand incremental nature of achieving change				

MOTIVATIONAL

35. Praise specific tasks well done				
36. Consult with volunteers before making decisions that affect them				
37. Provide promotion and growth opportunities				
38. Fair				
39. Seek concensus				

TOPIC

always

sometimes

rarely

working on it

40. Support individuals in face of group pressure				
---	--	--	--	--

PERSONAL DEVELOPMENT

41. Manage stress				
42. Work to resolve conflicts				
43. Seek feedback				
44. Delegate				
45. Understand personal motivation				
46. Manage time				
47. Accept help willingly				
48. Take time for relaxation				
49. Participate in professional development organizations				
50. Seek constructive criticism				
51. Maintain physical well-being				

Adapted from "Goals for Personal Development Inventory," in J.W. Pfeiffer and J.W. Jones (Eds.), The 1976 Annual Handbook for Group Facilitators, p. 59, University Associates, 1976.

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An honest appraisal of skills can lead to developing an improvement plan. Supervisors who want to improve their skills need to write measureable objectives and check them periodically.

\*\*\*\*\*

MANAGEMENT/SUPERVISION  
ACTION PLAN

SKILL DEVELOPMENT	ACTIONS TO IMPROVE PERFORMANCE
1. _____ _____ _____	a. _____ b. _____ c. _____
2. _____ _____ _____	a. _____ b. _____ c. _____
3. _____ _____ _____	a. _____ b. _____ c. _____
4. _____ _____ _____	a. _____ b. _____ c. _____

**MANAGEMENT/SUPERVISION**

**ACTION PLAN**

**ACTIVITY**

**ACTIONS TO TAKE TO IMPROVE PERFORMANCE**

1.

2.

3.

4.



## TECHNIQUES IN SUPERVISING

1. Learn all you can about your people
2. Learn to give orders
3. Ask for help from your volunteers
4. Make decisions promptly
5. How to criticize
6. Settle grievances
7. Deal with the problem volunteer quickly
8. Maintain a sense of humor

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CHAPTER 13  
VOLUNTEER EVALUATION

## CHAPTER 13

### VOLUNTEER EVALUATION

Strictly speaking, evaluation is a part of the supervisory process. It is continuous. It is critical to the process of maintaining motivated volunteers. Its importance cannot be overstated. For that reason, it warrants a chapter which explores the full aspect of evaluation related to volunteer performance.

There are two types of evaluation, informal and formal. The two types are tied together and essential to effective supervision. The goal of supervision is to guide volunteers to behavior which will aid the agency to achieve its goals.

#### Informal Evaluation

The informal process is referred to as coaching in this manual. It is the daily, weekly, or monthly process of providing direct feedback to volunteers. Good coaching is:

- \* Praise for behavior that should be continued or improved.
- \* Providing the volunteer the opportunity to make mid-course corrections.
- \* Asking "How are things going?"

- \* Taking the time to really listen.
- \* Periodic meetings to review job progress - one every three months minimally.
- \* Checking with clients and providing feedback to the volunteer.
- \* Sharing articles or books with relevance to the volunteer's job assignment.
- \* Problem solving and suggesting strategies for dealing with clients or other staff.

Coaching is encouraging and personal. It should be related to individuals. It is performance related. It takes time and a prodigious memory. Managers need to train volunteers, who supervise other volunteers, to use coaching. When dealing with large numbers of volunteers, develop a simple card file system on volunteers with some basic data: name, age, family, jobs in agency, and employer. Leave room for handwritten notes about that volunteer.

#### Formal Evaluation

The formalized evaluation process occurs in a yearly performance appraisal. (See Page 167) It is a written record of the strengths and weaknesses of a volunteer. It is a tool to provide information for

mapping a plan to correct weak performance and improve strong performance. Nobody reaches "maintenance". Status quo means going backwards. Any performance can, in fact, be improved.

Effective evaluations occur when a volunteer is asked to evaluate their own performance, using the same form as their supervisor. The two sit down together and compare forms. They explore areas of agreement, plans for the future, and try to discuss, openly and fairly, areas of disagreement.

There should be no surprises in the formal performance evaluation. The informal process of coaching allows the supervisor to keep the volunteer informed about their progress. When the volunteer swerves off course, the supervisor coaches him/her back to the path. The performance appraisal merely formalizes what has been an on-going process and provides a written plan for improving performance. The performance evaluation is not a time for the supervisor to play "gotcha" with a volunteer.

#### Supervisor Evaluation

Supervisors should request evaluations from their volunteers. (See Chapter 12) The people most intimately

knowledgeable about a supervisor are those supervised. It requires a personal sense of security and openness to receive this type of feedback. Volunteer evaluations can assist the manager of volunteer programs to engage in self-evaluation. It can point the way to further reading and study, to look for workshop offerings, or to request assistance from one's supervisor. It can be a form of positive feedback to help bolster the morale and motivation of a staff member with a very tough job.

#### Dismissing a Volunteer

If managers of volunteer programs follow the steps outlined in this manual, there should be no need to dismiss a volunteer. In the event that all supervisory techniques and evaluation procedures have failed to alter behavior that is potentially damaging to the goals of the agency and/or clients, then a systematic legal process for dismissal should be instituted.

Volunteer programs need policy and procedure manuals that spell out guidelines for volunteers. A personnel policies manual for paid staff can usually be revised to include volunteers. The manual should outline grievance procedures, reasons for immediate dismissal, and steps related to removal from job assignment. This

manual, provided to volunteers, gives the agency the legal muscle to back up dismissing a volunteer. Organizations need to protect themselves from potential law suits. Ministers are sued for malpractice, and volunteer agencies are being sued. The old saying about an "ounce of prevention being worth a pound of cure" applies in this case. Dismissal is serious. Supervisors must make sure they have taken all steps necessary to correct the problem. (See Page 168)

Dismissing a volunteer must be done with great care and attention to detail. It should never be done with a cavalier attitude. It should also be checked with the hierarchal line of supervisors. This would include volunteer supervisor, paid staff, President of the Board of Directors, or Chairperson of an Advisory Committee.

#### Documentation

Dismissing a volunteer frequently raises the issue of documentation. Volunteer programs should not wait for a crisis to institute a documentation policy relating to volunteers. Documentation begins with a personnel file for each volunteer. Large volume volunteer programs, with high turnover, may want to use a card file record keeping system. (See Page 169) The card should contain:

name, home address, employeer, work address, home phone, work phone, date of affiliation, job assignment, who to contact in the event of an emergency, space to record awards or honors received, and a place for the supervisor's notes.

If the volunteer agency elects to use a personnel file, it should resemble that of paid employees. All the previously stated information and applications, contracts, written evaluations, job performance plans, and work history, These files can be used as a repository for information by the supervisor. When staff hears good things about a volunteer from clients or other staff, a quick note dropped in a file (as well as telling the volunteer immediately) can serve as a reminder when it comes time to complete the written performance appraisal.

The file is also the location of written information on efforts to improve volunteer performance. In the file would be written memorandum, an agreement between supervisor and employee, warning letters, correspondence related to job performance, statements about corrective action signed by all concerned, and termination letters.

This record keeping task can be managed by volunteers. The individual selected must understand the confidential nature of the task. Direct client or member contact is not the only the way to serve an agency or organization. It can be done through clerical support to volunteer managers.

Evaluation can be presented in a creative positive way to volunteers. The benefits of doing it will be apparent in service to clients and motivation of volunteers.

## VOLUNTEER STAFF EVALUATION SHEET

Volunteers and their supervisors are asked to complete this form. When this has been done independently, the two individuals sit down and share their evaluations. A plan is made to assist the volunteer in any area desired.

Name:

Characteristic	Improve	Excellent	Progressing	Need to
1. Interest in carrying out program	--	--	--	--
2. Enthusiasm in assigned duties	--	--	--	--
3. Ability in work assignment	--	--	--	--
4. Punctuality	--	--	--	--
5. Willingness to accept responsibility	--	--	--	--
6. Interest in new activities	--	--	--	--
7. Performance in assigned duties	--	--	--	--
8. Relationships with clients	--	--	--	--
9. Relationship with staff	--	--	--	--
10. Setting a good example	--	--	--	--
11. Resourcefulness and initiative	--	--	--	--
12. Emotional control	--	--	--	--
13. Willingness to work with others	--	--	--	--
14. Flexibility to new conditions	--	--	--	--
15. Willingness to accept supervision	--	--	--	--
16. Fairness	--	--	--	--
17. Maintaining good work habits	--	--	--	--
18. Cheerfulness	--	--	--	--
19. Participation	--	--	--	--
20. Leadership ability	--	--	--	--
21. Total assessment of volunteer	--	--	--	--

A. Special skills volunteer possesses:

B. Area volunteer needs to improve:

C. Specific responsibilities volunteer had and assessment of how these responsibilities were met:

D. Would you recommend this person as a volunteer next year?  
Why or why not?

DISMISSING A VOLUNTEER  
A CHECK LIST

Recruiting

- ... Is there a clear job description?
- ... Was there an interview?
- ... Do you have applications?
- ... Do you have a volunteer contract?
- ... Have you "cleared" your advertising?
- ... If necessary, have you done a criminal records check?

Placement

- ... Is the job suitable for the person's qualifications?
- ... Did the volunteer have some choice of job?
- ... Was the person adequately trained?
- ... Do you have records of training?
- ... Is there a regular evaluation?

Maintenance/Support

- ... Is the supervisor using coaching techniques?
- ... Have problems been recorded?
- ... Has volunteer been trained to reduce the problem?
- ... Is additional training needed?
- ... Do you know the facts?
- ... Do you have a verbal agreement to correct the problem in a set time?
- ... Have you considered alternative volunteer placement?

Concluding Steps

- ... Do you have a written agreement to correct problem within a time period?
- ... Have you discussed consequences with volunteer?
- ... Have you checked your agency policies on termination?
- ... Have you followed your policies?
- ... Have you given volunteer other options to serve agency?
- ... Are you meeting face-to-face with volunteer to underscore the seriousness of problem?
- ... Is every step in writing?

CARD FILE RECORDS

SAMPLE

Volunteer Record	
Name: _____	
Address: _____	Home Phone: _____
Employer: _____	Work Phone: _____
Emergency Contact: _____	Home Phone: _____
	Work Phone: _____
Volunteer Assignment	Date
1. _____	_____
2. _____	_____
3. _____	_____
Awards/Honors:	Notes:
_____	_____
_____	_____
_____	_____
_____	_____

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CHAPTER 14  
REWARD AND RECOGNITION

## CHAPTER 14

### REWARD AND RECOGNITION

Paid employees and volunteers share a desire for appreciation. When asked what motivates them, one item high on the list is the desire for recognition. Like evaluation, recognition is a way to tell volunteers they are appreciated. Recognition and awards can take formal or informal forms.

#### Formal

Most organizations with volunteer programs do an excellent job at formal recognition. Certificates are presented, teas are held, dinners are served and volunteers receive plaques. A formal recognition process should have a carefully plotted sequence of events and written guidelines. First, an agency should have an award and recognition system. Some awards being given for length of service, awards for outstanding service to particular job types (clerical, financial, client-related, leadership, planning, etc.), and awards for volunteers who do not fit in neat categories. The criteria for the award should be clearly established and written. Awards can be named for



significant individuals in the history of the organization.

The procedure for nomination and selection should be standardized. (See Page 179) Anyone who volunteers or is employed by the agency should know the criteria for nomination and process of selection. They should also be part of the process. The best selection system encourages nominations from anyone affiliated with the agency. Those nominations are screened by an Awards Committee of staff and volunteers, using an objective selection process. (See Page 180)

This system allows for participation, builds on the staff-volunteer team, and provides a continuous recognition system that exists even when staff and volunteers change.

Any awards program should be sequential in nature. Awards must be available for individuals who give short-term service, as well as the 20 year volunteer. They should be different awards. As more volunteers provide short term service to agencies, it is crucial to review the entire formal award and recognition sequence. Like everything else in a volunteer operation, the awards are not static. The Awards Committee should review the

system periodically for relevance and appropriateness.

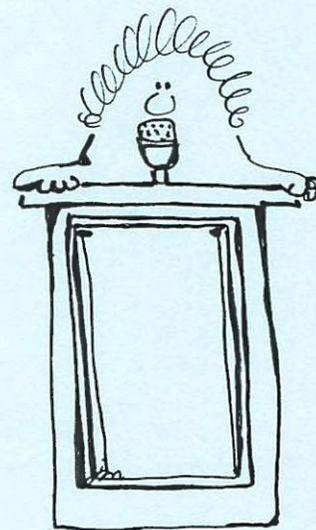
Other formal types of recognition include naming things related to the agency for volunteers, holding special events where awards are presented, budgeting that includes amounts to reimburse volunteers for the cost of their service (mileage, babysitting, for example), open invitations to volunteers to attend general staff meetings, and sending volunteers out of the agency for additional training. Formal recognition requires planning and money. (See Page 181)

#### The Event

As mentioned earlier, recognition takes many forms. Planning such events should be part of the Awards Committee's Job Description. They need to determine who the event is for, and then what type of event will be attractive to that group of people. For some, a pot-luck picnic with clients is ideal, for others a formal dinner at a hotel or restaurant would be appealing. Like everything else, the event should be based on the needs of the volunteers who are to be recognized. Volunteers can be modest about formal recognition, so staff and Awards Committees must plan events that are attractive and meet needs. (See Page 182)

A recognition event should have four characteristics. First, it should be inspirational. The people attending should come away with their spirit lifted and rededicated to the cause of the agency. Client participation, testimonials from volunteers, posters and banners celebrating the organization or agency, attractive programs with the theme or mission statement prominently displayed and opportunities to see what the volunteer service is achieving. There is a fine line between inspirational and "sappy". Volunteers can be driven away if they think the message is too sugar-coated. Subtle inspiration can be provided by location, decoration, printed programs, audio-visual presentations during the event, and even creative name tags.

The second characteristic of a successful event is humor. Select a mistress or master of ceremonies who is quick-witted and can bring humor to the presentation. Include humorous anecdotes as part of the program. Tell funny stories about award recipients (be careful not to tell something which



would embarrass them). Put together a slide show depicting "Embarrassing Volunteer Moments". Having a good time and laughing is as much a part of the volunteer experience as service to clients and donating money. It should be part of any formal recognition event.

The third characteristic of a recognition event is audience participation. Volunteers, staff, and clients who attend the event do not want to sit and watch one or two people talk. As part of the team, they want to participate. Ask volunteers, staff, and clients to stand and be recognized. If spouses and families have been invited, they can be reconized as supporting the member of their family doing the volunteering. Using a variety of presentors is another participatory device. The Awards Committee may like to present all the awards. They should be encouraged to involve as many other volunteers, staff, and clients as possible. Imagine a Girl Scout volunteer receiving an award from her Council that is presented by the members of her troop. The award is authorized through the official administrative line of the organization, but presented by someone close to the recipient. Some organizations have previous winners present the awards.

Participation can occur through non-award related activities, such as games, introductions at tables, singing, saying grace, or drawings for centerpieces. The more an adult feels a part of an activity, the higher his/her enjoyment.

The formal program should last about 45 - 60 minutes. Be sure to leave time for volunteers to visit. The event should have clearly segmented parts. There should be time for volunteers or members of the Awards Committee to tell of their work and underscore the reason for the event.

Entertainment can be included in the event. Have fun! It is the fourth characteristic of a successful event. A client choir performance, a stage band from a local school, a short theatrical or dance performance, a musical solo (vocal or instrumental), a short movie, or a skit by volunteers, staff, or clients. The group could help with entertainment through singing, a sing-along with a soloist, or a game activity designed to help people get to know one another. Again, the activity depends on the needs of the people for whom the event is planned.

When the event is over, it should be evaluated.

The Awards Committee should solicit the opinions of people attending the event. It is helpful if this is done soon after the event, to avoid memory lapse. Then the Awards Committee can make recommendations for the next event of this type. An easy way to enhance this process is to include an award recipient on the committee the following year.

#### Informal Recognition

Informal recognition is not actively pursued by all agencies using volunteers. But it is another factor that motivates volunteers. Recent studies of volunteers identify it as more important to some people than the more formal types of recognition. A hospital in Southeastern Washington has hundreds of volunteers. The Volunteer Coordinator of that program has a formal recognition program, but the volunteers talk about the informal recognition and what it means. The Coordinator is credited with offering encouragement to volunteers fearful of new assignments, she remembers birthdays, and she smiles and knows people by name. If a volunteer is sick, she calls or has another volunteer call to make sure that all is well. Cards go out monthly for birthday recognition of volunteers. Volunteers are effusive in

their praise of this woman. The recruiting effort is easy. Happy volunteers reach out to their friends knowing, they will enjoy this rewarding volunteer environment. (See Page 184)

Informal recognition is closely related to informal evaluation. Recognition is perhaps more even-handed and less judgemental. The message should be "I'm glad you are here as a volunteer".

One thing that the managers of volunteers should strive to achieve is variety in their recognition program. Not everyone is motivated by the same things. If the volunteer coordinator thinks certificates are a waste of time, he/she ignores the hundreds of people who frame certificates and place them on the walls of their home or office. Different people respond to different things. The recognition program of an organization needs to take that into account.

SAMPLE FORMAL AWARDS PLANNING SCHEDULE

October	Awards Committee appointed and trained
November	Review award criteria and forms Set dates
January	Distribute nomination forms to all staff and volunteers with explanation of award criteria
February	Receive nominations Preliminary screening Check potential recipient qualifications
March	Final selection Personal letters of commendation Set recognition program
April	National Volunteer Week awards presentation
June	Evaluation of process Recommendation for next year

SAMPLE AWARD NOMINEE EVALUATION FORM

The following sample is based on a volunteer who provides direct client service.

Relationship to Client Served

High 1 2 3 4 5 low

Evidence:

Completion of Client Related Tasks

High 1 2 3 4 5 low

Evidence:

Overall Service to Organization

High 1 2 3 4 5 low

Evidence:

Comments:

## FORMAL VOLUNTEER REWARDS AND RECOGNITIONS

- \* A certificate acknowledging their contribution.
- \* A special award designed specifically for volunteers.
- \* An article on a volunteer in your monthly newsletter.
- \* Volunteer recognition luncheon.
- \* Reimburse them for out-of-pocket expenses.
- \* Give them room to grow. (They stay longer if they don't always stuff envelopes.)
- \* Make sure you train the socks off them.
- \* Let them make decisions and have real power.
- \* Hold periodic in-service education sessions with all volunteers.
- \* Set up volunteer teams--people seem to work better with a buddy.
- \* Have experienced volunteers take over the training functions.
- \* Send them to conferences out of the immediate area and pay for it!
- \* Get clients to plan special thank you parties.
- \* Help the staff to understand the importance of volunteers and to participate in the recognition process.
- \* Teach the volunteer everything you can about your agency. They are your best sales persons for other volunteers.

## SUGGESTED FORMAL RECOGNITION EVENTS

- \* Banquets
- \* Teas
- \* Luncheon
- \* Pot-Luck Meals
- \* Pancake Breakfast or Spaghetti Supper  
cooked and served by clients
- \* Staff/volunteer pot-luck supper
- \* Client contest finals with awards for volunteers  
as well as clients
- \* Celebration with other agencies during National  
Volunteer Week
- \* Coffee hour at headquarters
- \* Annual Meeting of organization

## FORMAL RECOGNITION PROGRAM

### Sample

1. Introductions and Welcome
2. Invocation/Grace (optional)
3. Audio-visual presentation on the program
4. Awards
5. Singing/Celebration
6. Benediction (optional)
7. Closing remarks

## INFORMAL VOLUNTEER REWARDS AND RECOGNITIONS

- \* Learn their names and background.
- \* A sincere thank you.
- \* Ask their opinion and really listen
- \* Share information about the agency.
- \* Trust them with pertinent information that will help them do a better job.
- \* Have a cup of coffee with them.
- \* Send birthday cards to all volunteers.
- \* Call a volunteer to help when the office is short handed
- \* Include them in your staff meetings.
- \* Send personal thank you notes for jobs done well.
- \* Offer them the opportunity to help you edit written material.
- \* Send flowers to them for jobs done especially well.
- \* Consider their schedule.
- \* Talk to volunteers.
- \* Write to their spouse or boss thanking them for the time given to the agency and you.
- \* Let volunteers know you missed them when they are gone.
- \* Have a pleasant place for a volunteer to work.

CHAPTER 15  
PROGRAM EVALUATION

## CHAPTER 15

### PROGRAM EVALUATION

The last step in the management of a volunteer program is really close to the first step. By coming full circle the program is ready to be evaluated. The goals are reviewed and steps are made to improve the program.

Evaluation is a continuous process. It is the daily sense of how things are going. Volunteers, staff, and clients can indicate how the program is progressing. They possess instinct for the success or failure of any program. Some volunteer managers describe it as a feeling in the "pit of the stomach" or a "gut" feeling. This is not scientific, but it is important. Early warning signs come from this informal process of observation and evaluation. This is the signal that sounds the alarm to do a more formalized review of the program.

The more formal review of program goals and objectives should have been mapped out during the program planning process. The measurements of success should be written and known to all who are impacted by those measurements. They should be reviewed on a set schedule,

generally no more often than once each quarter or once a year.

A program evaluation process must be inclusive. It should use a similar format to that described in Chapter 1 on conducting Community Assessments. The process is more internal and should include volunteers, staff, and clients. It is helpful to get the community view from a small sample of individuals familiar with the program. Consistency in format, from the Community assessment phase to the Program Evaluation phase, is advisable. The agency then develops consistent statistical data over a longer period of time. It adds credibility to the results of the evaluation and aids in the planning process for the future.

A yearly program evaluation can be conducted by someone not familiar with the program. A staff member who works on a different program, an outside consultant, or a colleague from another agency. Using a barter system, the volunteer manager can get a true objective look by offering to do the same for someone else who runs a volunteer program. The outside evaluator still needs to involve those closest to the program in the process of collecting information.

The purpose of the formal evaluation is slightly different from the community assesement process. Now there is a client group who has been served and that service can be assessed against some measureable goals and objectives. It is a process of gathering data, both objective and subjective, about the program.

Like the Community Assessment, it is interested in whether needs are being met, how well they are being met, and what the agency can do to strengthen its service to the client group. The similarities between Community Assesement and formal Program Evaluation are numerous. It is easy to see how this entire system can work when an organization is developing a new volunteer program; but, how does it work with existing programs? The same way! Take the venerable Red Cross Community Blood Drawings. The beginning of the year could bring an assessment of volunteer, staff, and community perceptions about this service. A list of goals and objectives for the ensuing year could be drafted for the program. The remaining steps suggested in this book would be used, where applicable. The Program Evaluation process would review those original goals and objectives and establish new ones, based on the successes and failures of the previous

year. There is no place in the management of volunteer programs for complacency. A program that has existed for 50 years can lose its effectiveness. Program evaluation provides a continuous process of monitoring and renewal that keeps good volunteer programs healthy and alive.

Some organizations choose not to evaluate on a formalized basis. This can be caused by fear and avoids dealing with reality. It seems to operate on the "no news is good news" theory. The lack of evaluation raises questions about the agency's commitment to clients. It can lead to stagnation and lack of direction for staff, volunteers, and clients. Individuals cannot measure their progress unless there are objectives to measure against. Managers and supervisors are hard-pressed to ask for improvement when there is no measurement of program or personal effectiveness. Managers, who do not engage in Evaluation, jeopardize their entire program.

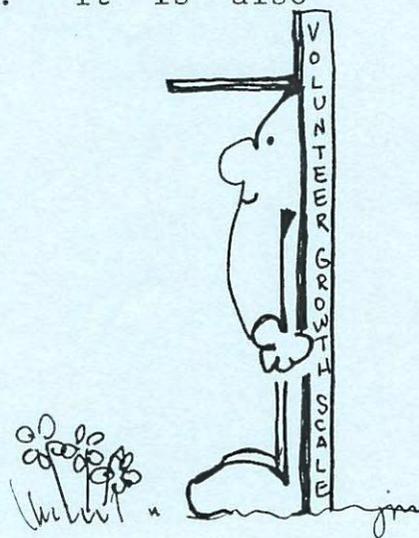
Volunteerism begins and ends in the same place. (See Page 191) Assessment and evaluation are two sides of the same coin. But success is elusive in the circular process of managing volunteer agencies. It cannot be achieved in a short period of time.

Managers of volunteer programs leave their

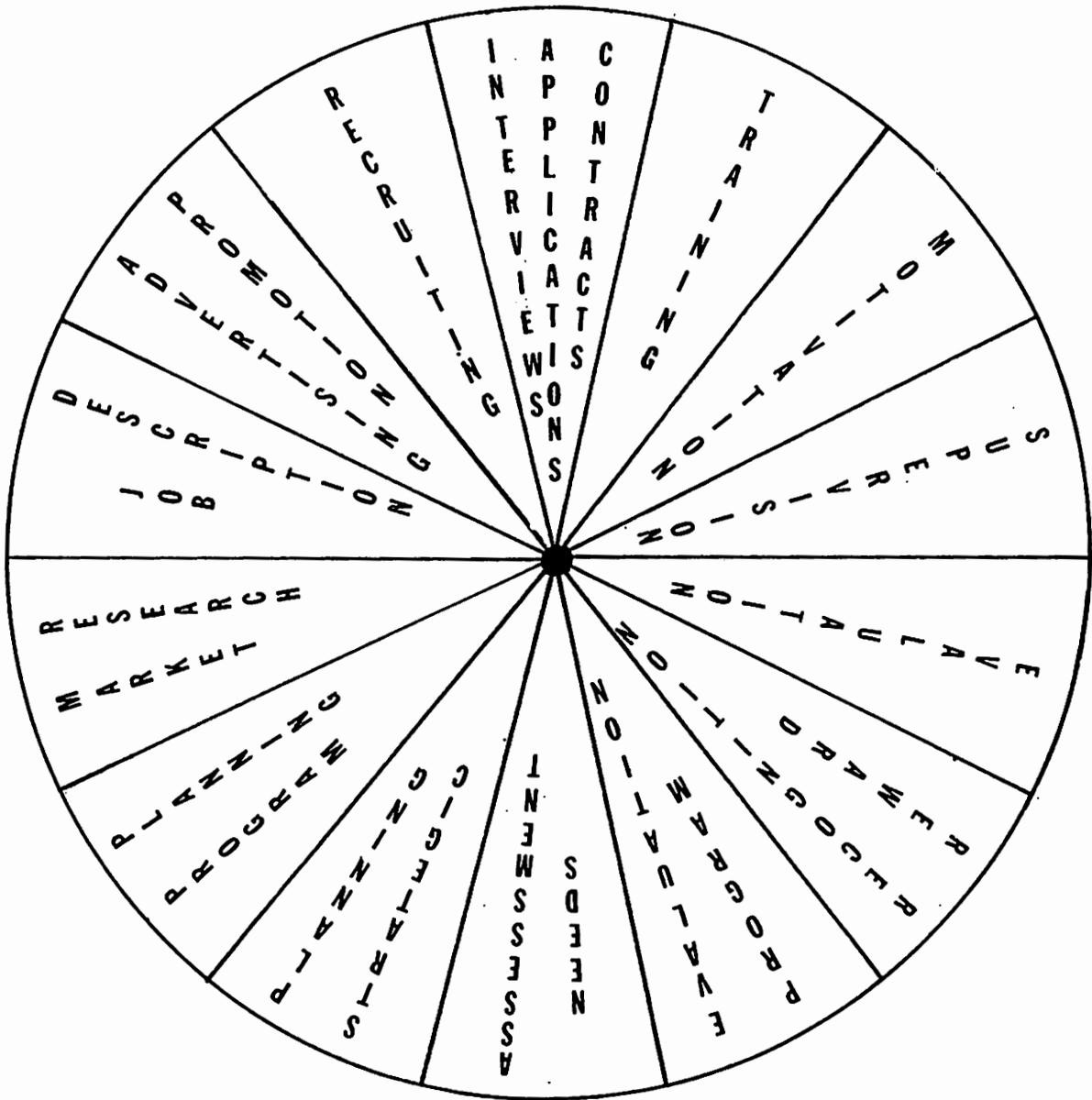
positions after a stay of about 3 3/4 years. This staffing pattern affects the development of consistent well-managed volunteer programs.

A key ingredient is reviewing the entire program. Selecting one or two areas for major overhauling. Establish goals and objectives, with dates, to make changes. (See Page 192) This allows the volunteer manager to continue with the daily program and to build a stronger program through planned change. Once an area is "up" and functioning with volunteer depth, the manager can move on to a new area of development.

Volunteer managers should have patience and a sense of humor, as a prerequisite to their job. It is also critical that they give more than lip service to the true contribution of volunteers. Volunteers are not just free labor, they are a part of the team. Managers, who have difficulty with that concept, should distance themselves from employers who use volunteers. The most satisfying aspect of managing volunteer programs is to watch volunteers grow. Seeing individuals take the reins of an agency and direct it to greater



service to clients in a community is a reward greater than money.



WHEEL OF VOLUNTEERISM MANAGEMENT

SETTING GOALS

Directions: To be effective, goals must have four observable characteristics - 1) measureable, 2) achievable, 3) demanding, and 4) flexible. In the spaces below list an goal you would like to achieve in the next three months. Beneath it indicate how it has the four characteristics of effective goals.

GOAL:

-----

Measure: .....

Achieve: .....

Demand: .....

Flexibility: .....

GOAL:

-----

Measure: .....

Achieve: .....

Demand: .....

Flexibility: .....

GOAL:

-----

Measure: .....

Achieve: .....

Demand: .....

Flexibility: .....

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