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Asked to Be Friendly

## Mixed Messages to Volunteers Whom We've Asked to Be Friendly

By [Susan J. Ellis](#)

June  
2015

Last month I used this space to talk about the consequences of the lack of knowledge about volunteer involvement by relatively thoughtless executives. This month I want to focus on conflicting messages and unclear boundaries common to many of the most traditional volunteer roles:

- Any assignment labeled some variation of “friendly visitor” or “buddy,” in which the volunteer agrees to spend several hours weekly with a client – often a homebound senior or someone with late-stage AIDS. These visits are usually in the client’s home, one-to-one, with little structure other than the goals of providing welcome company, forming a supportive relationship, and being helpful in small, practical ways.
- Youth “mentoring” programs including, but not limited to Big Brothers Big Sisters, in which children of various ages are matched individually with an adult who is willing to spend time with the youngster as a caring friend (and often as a role model) – not as a babysitter, parent, probation officer, or therapist. The pair meet in the community to do things together and, ideally, form a close bond.
- “Coaching” an adult, also one-to-one, to succeed at an important life goal. The types of people needing help include recovering addicts learning how to spend weekends without drugs or alcohol, parolees re-entering the community, public assistance recipients in their first full-time job, refugees and immigrants tackling life in a new country, or adults wanting to improve literacy skills.

Consider the implication of these “friendship” assignments from the three perspectives of those involved:

**The volunteer** responds to the idea that this service is important and that caring attention will make a difference to the assigned person in need.

**The client** generally does not want another formal, professional expert, but a friend. Someone who offers respite from daily problems, cares on a personal level, and provides some help in daily, practical matters.

**The agency and paid staff** want to serve clients as an *extension* of their professional services. They see the client as their responsibility and the volunteer as their agent. Both are true, but *neither* account for the intangible quality of individualized, personal attention called *friendship*.

## Whose Perspective Counts the Most?

If you look at the way one-to-one volunteers are recruited, you are likely to see invitations to sign up couched in deceptively simple language: *be a friend; only an hour of your time; make someone's day brighter; just be you and show that you care*. Despite such messages, in many ways these roles are the hardest things we ask volunteers to do. Often the clients needing the most personal attention are the ones with the most problems and the fewest friends and family in the picture. Some may live in low-income neighborhoods with high crime levels, or live in homes that may be poorly furnished or even unclean. Volunteers sign on to meet a client without knowing what they will see, experience, even smell. But that's exactly the sort of challenge that makes these special volunteers step up to give service.

We ask these individuals to meet the goal of "helping" in isolation, most often alone with the client, far from the organization that has made the match. Because of the individual nature of such visits, we can't really give the volunteers a script or a one-size-fits-all agenda. Success depends largely on chemistry: Will the client and volunteer like one another and enjoy each other's company enough to keep meeting?

So everyone is happy if the match turns out to be friendly. But what happens if the two people actually become *friends*? Whoa! Suddenly we discover that most agencies care more about maintaining professional *boundaries* than anything else.

## Boundaries

Many professions teach that it is necessary to maintain some distance from a problem or the people experiencing it so that help can be given objectively and competently. Certainly we don't want a nurse administering medicine while crying in sympathy for a patient's pain or a social worker torn between the conflicted feelings of children, parents, and grandparents. But



what is proper for the paid service provider is not necessarily what comes naturally to the volunteer we've recruited to be a friend.

The first responsibility of the organization is clarity in discussing expectations. We need to express – at the start – the things we do *not* want a volunteer to do, and hold the same discussion with each client who will be assigned a volunteer.

Some of the boundaries are completely legitimate, although they come with gray areas. The volunteer is not there to clean the house (but of course can clean the dishes in the sink after a shared meal). The volunteer should not give opinions or advice on medical care (but what if that's on the client's mind during a visit?). The service is only for the specific individual assigned (but how can the volunteer not be friendly to others in the household during the visit?). No money should be given, loaned, or requested on either side (so what happens when the grateful client unexpectedly leaves something to the volunteer in a will?).

In the real world, volunteers react to situations when they happen, in the best way they can with the resources at hand. Unfortunately, however, when the agency hears what was done (after the fact), too often the volunteer is reprimanded or even terminated. Here are three real-life examples (and I have many more):

- A coach transports two young athletes to a meet, despite a no-driving-children rule. Why? The coach is the parent of one child and was asked to drive the teammate by that child's parent.
- After three years of friendly visiting, and therefore meeting the brother of the female client often, the client asks the volunteer to visit her brother in hospice care because he is alone there and she is not well enough to go herself. The volunteer, not able to go personally, arranges for a friend of the brother to visit. The hospice (run by the same parent agency) reports this as a violation of the brother's confidentiality and even (incorrectly) quotes HIPPA to the confused volunteer.
- A mentor invites his assigned child to come to his family's Fourth of July barbecue, and also invites the child's mother and siblings. The agency sees this as violating the one-to-one rule.

## Don't Be Surprised...and Prepare

Life happens. You can easily see how each of the three situations above would occur naturally if the volunteer had succeeded in the primary request of the organization: please be friendly and supportive of your assigned client. The trouble is that no paid service worker would ever do these things. And isn't that the point?

Please understand that I am not denying the importance of rules, risk management, and proper behavior. I am advocating, however, that we grasp the magnitude of what we are asking volunteers to

do when we tell them to form personal relationships with clients. Social workers may be able to explain a refusal to do something out of bounds, but sometimes a friend just does what another friend asks. And it is mean-spirited of an agency to then call a volunteer on the carpet because they transgressed in being “too friendly.” Maybe we should change the name of these friendship assignments to “Not-So-Friendly Visiting” or “Sometimes Buddy”!

Note, too, that in all the examples, the volunteer did what *the client* wanted. Ultimately, isn’t the client (or legal guardian) the arbiter of what can be done in his or her name?

So the take-away is this:

1. Examine your recruitment materials to see if you are luring volunteers in with the offer of forming important friendships (even implying kinship!) without considering the consequences of true success.
2. Provide training on how to deal with the unexpected. Discuss your desired boundaries and why these make sense for everyone. Most important, explain what to do if a client requests a service that seems to stretch those limits.
3. Create an easy but regular reporting system that assures the paid staff member who made the match is keeping in touch with both the volunteer and client and has a feel for how things are evolving. Very often the matches last longer than the paid staff member, and a new hire will lapse contact with those matches predating his or her time with the agency. This is a recipe for unwanted surprises.
4. Be clear on what a volunteer should do when confronted with a situation needing assistance from someone, even if it shouldn’t be from the volunteer. Who should the volunteer call to discuss actions to take? What if it’s after office hours, since many matches get together in the evenings or on weekends? Do not expect a volunteer to tell a friend (the client), “Sorry, but your need will have to wait.”
5. Develop a process for dealing with problems when they occur. In fairness, this has to give the volunteer the chance to explain the circumstances of the action taken. Then take those circumstances into consideration and be open to permitting exceptions to the rules if sensible. And ask the client’s opinion, too! Even if you determine that the behavior is not excusable, determine if it was done in good faith and to serve the client. And please say “*Thank you for trying to help.*” After all, you asked the volunteer to become a friend.

Another thing to consider is this: you can fire a volunteer, but you cannot end a friendship by executive order. Unless the issue is one of criminal intent, the two people who have become friends through your introduction have every right in the world to keep seeing each other. Not under your

auspices, of course, but because they each want to. What do you want them to say when they talk about your organization?

- *Have you experienced any of these too-friendly-visiting scenarios? What happened?*
- *How has your organization handled unexpected crossing of boundaries in these sorts of matches?*

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## Comments from Readers

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*Submitted on June 3rd, 2015*

*Mary Ann, Retired Volunteer Coordinator, Columbus, Ohio, USA*

Well said, Susan! As always, your assessment is spot on!

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*Submitted on June 4th, 2015*

*Anonymous, Princeton, NJ, USA*

This is a really tough issue that I'm glad you addressed so openly. I have worked with a variety of volunteer programs, all which seem to address this issue in the same way - "Be compassionate and effective, but don't be too friendly." For example, I managed volunteers for a dual-service sexual assault/domestic violence agency, and we constantly reminded volunteers that while they were there to be compassionate in a time of great distress, they were never to become "friends" with victims/survivors. I never really saw volunteers cross professional boundaries, but it was tough for some people to know the difference between being friends and being friendly - this is an issue we could all stand to delineate more carefully in our programs, I think. Strong bonds are forged quickly in times of distress, so it can be really difficult to sit with someone in crisis and not want to become a friend in that moment. Now I manage volunteers for a prison-based program and of course we have LOTS of boundaries - but again, volunteers have a difficult time NOT establishing friendly relationships with men and women with whom they interact on a weekly basis. They become invested in their partners' outcomes - successes AND failures - and they are deeply moved by everything they experience. Isn't that what we want for them?! I worry more about the volunteer who DOESN'T become emotionally invested in the work he/she is doing because it signifies to me that this person may not be well-suited for the field or for volunteering in a particular capacity.

I suppose all this is to say that while boundaries are important, so are human relationships - I believe they are, in the end, what will help our world heal from trauma and distress. But it's a

tough line to walk and ALL of our volunteers do it at some point - I am so very glad you've begun to address this issue here. I hope we talk about it more in this field.

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*Submitted on June 5th, 2015*

*Susan J Ellis, Energize, Inc., Philadelphia, PA, USA*

Thank you so much for such a well-articulated response. I agree that this issue is simply not discussed openly often enough, even though so many different organizations have these kinds of friendship-but-with-boundaries roles for volunteers. Perhaps some of you with direct experience in managing such matches could actively surface it in professional forums in different ways. For example:

- Request that this topic be addressed in a conference workshop at any forum, locally or nationally -- or offer to run such a session yourself. A discussion leader does not always have to be the one with the answers; it is quite powerful to open the discussion and frame good questions.
- Submit articles on the subject to various journals (please start with *e-Volunteerism!*). If any reader of this Hot Topic is interested in contributing to a journal article about friendship volunteers in some way, please e-mail me directly at [susan@energizeinc.com](mailto:susan@energizeinc.com) and perhaps we can publish a discussion of the topic.
- Approach academics with a request for some research on how volunteers feel about being asked to be friendly but not cross into friendship -- and how about studying what the *clients* think from their side of the relationship?
- Start a LinkedIn group or other discussion forum to focus on these relationships. I'd be happy to help publicize it.
- At a minimum, ask to spend some time in a staff meeting talking about your organization's expectations (feel free to use this Hot Topic and the responses from colleagues as a discussion starter).

Thanks again!

Susan

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*Submitted on June 5th, 2015*

*Anonymous, Stuart, FL, USA*

Our organization provides food, clothing, household items, financial assistance and information and referral to thousands of clients each month. We have worked hard to provide clear guidelines and criteria for services, and even harder to get our volunteers to understand the importance for treating people as fairly and consistently as possible. It has taken a few years, but we have seen great improvement with the boundary challenge and it is discussed in

our volunteer orientation, staff meetings, and prospective employee interviews. We average 200+ volunteers a month and over 3,000 hours of time and talent each month. In 2014, volunteers helped us increase our capacity to fulfill our mission by providing more than 41,000 hours of service.

Although we try to keep it top-of-mind, volunteer staff is here a limited amount of time compared to paid staff and are not as exposed to the conversations about boundaries as a paid staff members. When we become aware of volunteers having challenges with boundaries, their direct supervisor and I will have a conversation with them to help them understand the reason behind our expectations and boundaries. Volunteers want to do the right thing and almost always understand, once it is explained to them and are willing to modify their behavior. It isn't a good or bad issue or a right or wrong issue, but when you are part of an organization, the expectation is that you will follow policy and procedure.

Although most of our volunteers don't have one-on-one relationships with clients, they have on-going interactions with many of our clients. Volunteers know the clients by name, often know their situation, and feel empathy for the clients. Clients can visit our pantry daily for bread and produce, in addition to client-choice "shopping" about once a month.

Our volunteers come to us with a desire to give back and help people in need and that is what makes them so awesome! It is human nature to have favorites, feel empathy and compassion. We try to help our volunteers understand that following our guidelines for providing services is important in several ways. I have listed a few thoughts below.

1. Our goal is to always provide excellent customer service to EVERYONE. If you are giving "extras" to your favorites, it isn't fair to to other clients or other volunteers. It is confusing to clients, if one volunteer goes outside the boundaries of service and another volunteer sticks to the boundaries. It also creates animosity among the volunteers if a client tells them that another volunteer allows "extras."

If everyone is treated with kindness and respect, they will feel valued. You can have boundaries and still be friendly with people. The words you choose, your tone of voice, and a friendly smile, all help the client to feel valued. You can be professional without being cold and impersonal.

2. Our service model is an empowerment model. The clients are the agents of change and we are here to support them. Sometimes, clients will choose not to provide what is required for services. That is the client's choice. If we have boundary issues, it really can impede empowering the client.
3. Boundaries are also a matter of personal safety for the volunteer. If you were to give someone a ride, you don't know what you might be driving into. The client may be

delightful and kind, but there could be someone that could be threatening wherever you are taking the client.

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*Submitted on June 5th, 2015*

*Susan J Ellis, Energize, Inc., Philadelphia, PA, USA*

Another wonderful and thoughtful response. Thank you! Your guidelines provide practical tips for what any client-serving organization might give as guidance to volunteers (and to paid staff).

I simply want to point out, however, that you expressly explain you are not asking volunteers to work one-to-one with an assigned client for a period of time, off-site. It is this particular sort of volunteer role that I was addressing in the Hot Topic.

I'm glad that you point out other ways that we ask volunteers to be caring -- and how important it is to be so equitably to all clients. When people receive their services on-site, it is legitimate to ask volunteers and employees to behave in a similar manner. In fact, clients may not always be aware of whether the person helping is paid or not.

A lot changes when the client and volunteer are "matched" and told they will be forming a relationship to support the client. That situation is much harder to "guide," but we need to understand it!

Thanks again.

Susan

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*Submitted on June 15th, 2015*

*[Sheryl Luebke](#), Volunteer Resources Supervisor, JFS/Jewish Family Services, Richmond, United States*

Thank you, Susan. You have inspired my August training topic.

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*Submitted on June 15th, 2015*

*Susan J Ellis, Energize, Inc., Philadelphia, PA, USA*

Happy to oblige, Sheryl! :-)

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*Submitted on July 3rd, 2015*

*Kayla Young, Fairview, Alberta, Canada*



You are so brilliant Susan! I love reading your Hot Topics and the e-Volunteerism online magazine.

I am new to the field but enjoyed studying a volunteer program management course through Humber College in Toronto.

You always give me such great discussions to bring up at staff meetings and to grow in my profession.

Thank you!

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*Submitted on July 3rd, 2015*

*Susan J Ellis, Energize, Inc., Philadelphia, PA, USA*

Thank you, Kayla! Discussion starting is always my goal. :-)

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*Submitted on August 21st, 2015*

*Charlene Wee, CVA, Vancouver, Canada*

Great article, Susan! I particularly like how each example is different and yet based on real situations. In my experience alone, several similar situations have presented themselves and I have found myself asking, how could these have been prevented or at the very least, what kinds of preparations could have been made?

Moving forward, I'll be offering a workshop or two in the area of supervision and boundaries and I think it's important to highlight what volunteers look for as well in these types of positions and opportunities. Example, an organization may be looking for a traditional paid worker to clean up in a home, but since volunteers don't generally sign up for these types of placements and look for ways to connect with their community, we do end up setting ourselves up for the preventable outcomes.

As you said, how friendly is too friendly and when does volunteering become too much of completion of tasks than an accomplishment of outcome (providing social outlets or being a scripted messenger?)

Great one!

Energize, a program of Adisa <https://adisagroup.com/>

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