

EVALUATION FOR VOLUNTEERS

PROGRAM AND PERFORMANCE



This manual was produced from a research project carried out as a field placement for the Humber College Certificate Program in Fundamentals of Volunteer Management.

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Evaluation as a demonstration
of the value of work.

Evaluation as a positive for
all organizations.

:Accountability:

Job experience and references.

PETERBOROUGH COUNTY BOARD OF EDUCATION

THE QUESTION OF VOLUNTEERS' EVALUATION

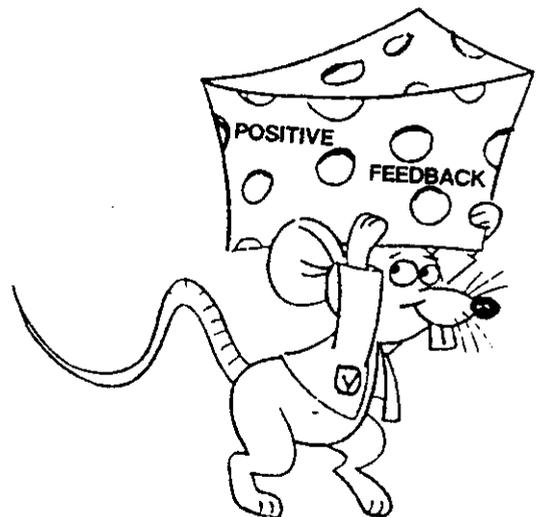
INTRODUCTION

The idea of evaluating the performance of those who are giving service of their own free will may appear, at first glance, to be almost counterproductive, as evaluation would seem to imply a value judgement - either "good" or "bad". Until recently, the traditional philosophy seems to have been that volunteer service did not deserve even constructive criticism. However, present trends now emphasize the idea that if a person's work, (paid or unpaid), is of REAL worth, then staff can - and should - demonstrate the importance of that work by providing a means of two-way feedback and communication. Approached with creativity and sensitivity, and developed as an integral, positive part of the program, clearly defined and reviewable performance standards can only improve the effectiveness of any volunteer activity.

As a major component of any management program, evaluation provides feedback about the effectiveness of personnel within an organization, identifying progress or problems at all levels. This means that one can preserve what is good and improve what is not. And this is as important for volunteer organizations as it is for business.

Today, volunteers and volunteer programs are increasingly required to meet quality assurance guidelines and accountability criteria, particularly in the health care field. Evaluation procedures can help give necessary documentation.

In addition, many persons now volunteer to gain work experience, so evaluation of their performance becomes important as a reference point in the job market, or for acceptance to further levels of education. For these volunteers, thoughtful, objective performance evaluation can be of great importance to their career development.



Evaluation can be a real positive for volunteers.

PERFORMANCE REVIEW PROCEDURE

A first step towards accentuating the positive aspects of the evaluation process is to get rid of the word "evaluation" itself! In consideration of the lingering doubts of many re the correctness of "judging" volunteer service, an emphasis on moving forward can be better achieved by using alternative terms such as:

- Accomplishment report
- Progress report
- Program review
- Feedback
- Response survey
- Performance appraisal
- Follow-up review

It is also important that volunteers are made aware, WELL IN ADVANCE, that an evaluation procedure will take place, what it consists of and that it is designed as a sharing of two-way dialogue. The ideal time for this would be during the original interview or initial orientation session. Providing this information early on, sets the stage for a constructive working relationship. To repeat, through evaluation, volunteers are made aware that the jobs they are being asked to do are truly worthwhile since they are important enough to be assessed.



Don't sneak up unannounced with evaluation of volunteers!

Objectives of evaluation process

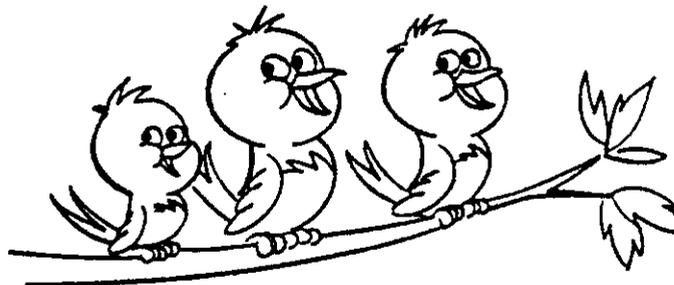
Needs~
organization
volunteers

EVALUATION - FORMAT AND DESIGN

To design a useful evaluation format, one must bear in mind that the overall goal of evaluation is to help improve the effectiveness of the group or organization. Therefore, the evaluation format must be shaped to objectives which work to that end. Specifically, volunteer performance appraisal is intended to:

1. Increase volunteers' motivation by:
 - a. Assisting them to grow towards meeting their own needs
 - b. Providing a means of commendation for a job well done
2. Improve managerial awareness of the volunteers' job tasks and/or success or problems. This awareness should lead to:
 - a. Review of assignments for necessary changes
 - b. Assessment whether job goals fulfilled or not. (If not, why?)
 - c. Identification of those needing further advancement/challenge
3. Improve the volunteers' understanding of their own role, i.e. - clarification of what standards and procedures are expected.
4. Assess the appropriateness of volunteer selection and placement. This can indicate any need for:
 - a. Refinement of the interviewing/screening and placement process
 - b. Adjustments through transfer or even termination
5. Identify training and development needs from volunteers' feedback. (To be considered with budget and resource planning in future directions for the program.)

In all of the above, the accent is on improvement. One should look for progression toward increased commitment and development of each person's responsibility for their particular role in the program. And in the final analysis, are the needs of the group/organization AND volunteers each being met?



Shared feedback helps make a team.

Humanistic values -
versus dollars and numbers

Standards

Bias - how to avoid

Timing of evaluation

AREAS OF SPECIAL CONCERN

Unlike the business world, in the voluntary sector, the value of our "product" is usually "humanistic", often thought difficult to measure. Volunteer organizations cannot base their perception of success on charts of sales figures. This, in itself, can be seen as a further argument for the need for an effective procedure for feedback/evaluation based on personal input, rather than numerical data.

In evaluation of volunteers particular attention should be given to:

1. Criteria

Performance appraisal criteria needs to be dynamic in that it should be applicable to volunteers at different levels of experience and responsibility. Criteria should be established that reflects both activities and results and should be as explicit as possible.

Nowhere is this explicitness more important than in the organization/group's standards of expected behaviour and competency. THESE STANDARDS SHOULD FORM THE BASIS OF THE EVALUATION CRITERIA. They also should form the nucleus of the volunteer's job description.

2. Avoidance of Unconscious Biases

We are all human! If a supervisor has an overall "good" opinion of a volunteer he/she may tend to rate that volunteer's performance too glowingly - the "halo" effect. Conversely, perhaps a quieter, shyer or newer volunteer may not get all the credit to which they are entitled. Methods to avoid bias could be to:

- a. Use more than one supervisor to give feedback (if possible).
- b. Clearly define - in a way which is understood by all evaluators - the rating levels, i.e. - what exactly is meant by "satisfactory" or "good".
- c. Design several questions which measure the same performance, e.g. - "Is volunteer self-motivated?" "Does volunteer look for work to do?" "Does volunteer require on-going direction?"

3. Timing

The timing of an evaluation should be carefully considered. If either evaluator or evaluatee is stressed, tired or depressed, the outcome may be coloured by this. In addition, (with the obvious exception of short-term assignments), sufficient time should be allowed before an evaluation takes place for the volunteers to feel familiar with their role - possibly 3 to 6 months. (This does not affect the initial trial period at the beginning of the placement where a review takes place after perhaps just two weeks to ensure that the placement is indeed appropriate.)

EVALUATION METHODS

There are two general approaches to evaluation, i.e. -

- Informal
- Formal

Informal Evaluation

Consists of periodic meetings, personal interviews and on-going observation. To ensure accuracy of information, even in this more relaxed approach, questions asked should be the same for each volunteer evaluated and some type of recorded documentation made.

Formal Evaluation

Involves the use of written information with concern cards, questionnaires and survey forms. The best way to use these is in combination with a personal meeting with the volunteer, in order for discussion and sharing to take place.

Whatever method - or combination of methods - is used, a variation of the K.I.S.S. principle should be applied. ("Keep It Short and Simple"). And ... continually be aware that you are looking to improve the effectiveness of the group/organization through re-emphasis of the expected standards of performance and the overall goals toward which everyone should be working.



When everyone provides feedback and input, progress is possible.

COMPONENTS EVALUATED

Volunteer programs contain several components, each of which should be evaluated and the results then "cross-referenced". These components are:

- the program design itself
- the volunteers
- the staff

And in very many cases,

- the clients

The feedback concerning each of these is collected from all persons involved, i.e. -

Volunteers Assess:

- the program
- staff support and supervision/interaction
- their own performance

Staff Assess:

- the program (including the role of volunteers)
- the performance of individual volunteers
- their own performance in relation to volunteers (and clients, if applicable).

Clients

- can give feedback on program, staff and volunteers

It may be too cumbersome to ask for feedback on all aspects on a single occasion. For example, feedback from staff about volunteers' performance could be done at a separate time from evaluation of their own performance. The "cross reference" would occur between staffs' view of the volunteers' performance and the assessment of their handling of those volunteers.



Are everyone's needs being met?

SUGGESTIONS FOR QUESTIONS

Directed to Volunteers:

- Did they feel they were able to make a useful contribution (to agency, group, program, clients)?
- Reaction to their placement, orientation, training, supervision, recognition for service given?
- Degree of support received from staff and volunteer manager?
- Describe specific accomplishments
- Were the actual job activities reflected correctly in the job description initially given?
- Suggestions for program improvements?

Self Analysis:

- Were they reliable and committed to the placement?
- Did they understand the need for and respect confidentiality?
- Were their individual goals - met by the placement?
or - changed in process?
or - not fulfilled?
- Would they like further advancement, challenge, training?
- Do they wish (or are they able) to continue volunteering with the group/organization?

Directed to Staff:

- Did they find volunteers enhanced the service delivery they wished to achieve?
- Were the needs of clients enhanced by volunteers' assistance? (Give specific examples of this.)
- Was sufficient support received from the volunteer manager?
- Was training for volunteers effective in terms of skill development and time spent?
- Can they define the role of volunteers under their supervision?
- Do the volunteers' job descriptions reflect their actual duties?
- What recommendations do they have for the volunteer program?
- Do they wish to continue using volunteers?
- If yes, the same, less or more in number? The same roles or different assignments?

Avoiding the negative

Computers as a storage tool

SUGGESTIONS FOR QUESTIONS (Cont'd)

Concerning Individual Volunteers

- Was the volunteer punctual, dependable, reliable?
- Capable of carrying out duties on the job description, effectively?
(Give examples.)
- Did the volunteer respect confidentiality?
- Present themselves and act appropriately? (Comment on any special strengths.)
- Show initiative and enthusiasm.
- Would they recommend that this volunteer continue in the program?

Structure of Questions

With either informal or formal evaluation, the wording of the questions used is extremely important. BEWARE OF ASKING QUESTIONS WHICH PROVIDE OBVIOUSLY NEGATIVE ANSWERS. e.g. - Do you feel accepted by existing staff? How do you think the situation should be improved? The second question implies that the answer to the first will be "No"!!

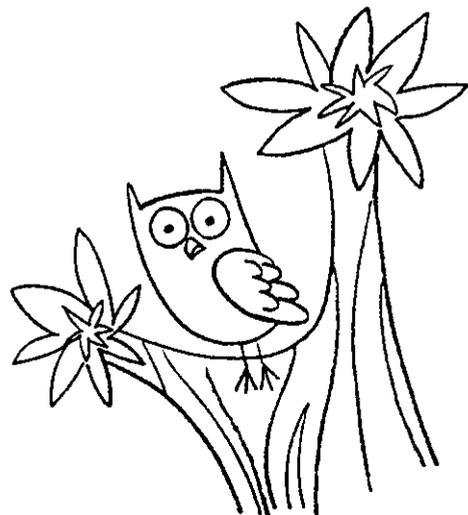
Computer Tabulation

It may be worthwhile to consider the use of computer data files when designing the questions and possible responses for evaluation. Even if computerization is not in place now, thought can be given to a method of coding questions and answers for speedy collation, plus efficient and retrievable information storage.

A word to the wise...

Store evaluation data

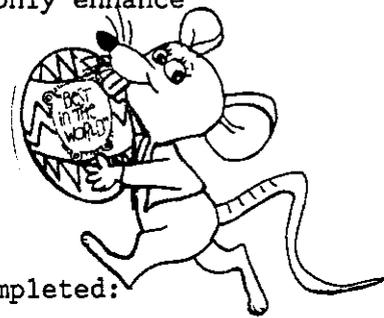
in an accessible form.



It can be seen how the questions answered by staff, volunteers and clients give various perceptions of the volunteer program and the personnel involved. This then leads to consideration of the larger question - are the needs of the group/organization being helped towards their realization through the operation of the Volunteer Program? The documentation received through careful evaluation will help to answer this.

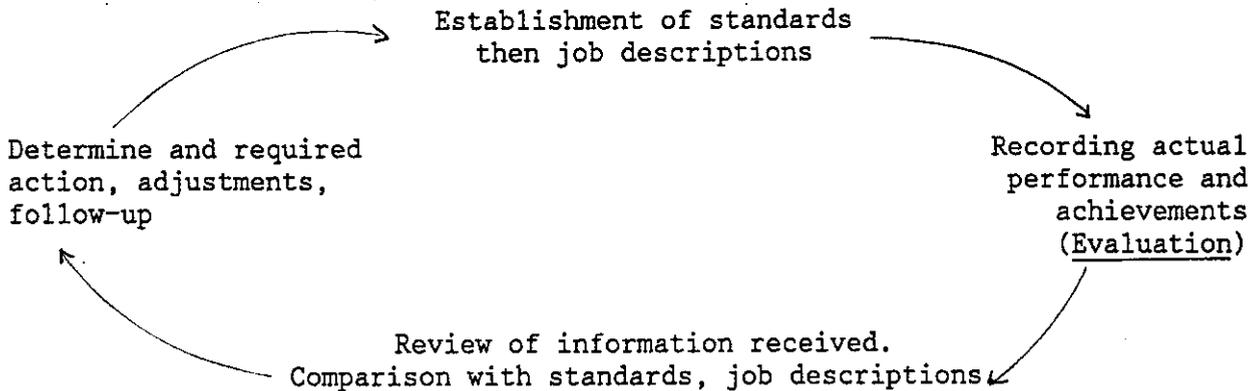
If discrepancies, gaps or difficulties are identified via the evaluation process, it is essential that there be follow-up action. This could be a phone call to clarify and/or correct a situation, provision of more challenge or training for a volunteer, changes made to a job description, reassignment for a volunteer, or discontinuation of a surplus, ineffective or inappropriate service. Be sure too, that if OUTSTANDING volunteer service is identified, THAT SUCH EXCELLENCE IS PROPERLY RECOGNIZED. Recorded and recognized accomplishments should increase personal satisfaction for volunteers, inspiring more commitment and motivation which can only enhance the program overall.

**Winners should be told
what they are...**



MANAGEMENT CYCLE

With properly structured evaluation, the management cycle is completed:



In the following appendix, there are several examples of evaluation/feedback forms. None are intended as the definitive version, as evaluation materials should be shaped to the structure of each particular group/organization. The format which suits one's own situation is arrived at through consideration of the information required to pinpoint whether or not needs are being met. However, these examples hopefully will give some suggestions to get started.

The following sample forms are presented only to give an indication of several formats used by some agencies/organizations for evaluation of volunteers. Should you wish to reproduce any of the forms, without substantial change and for general distribution, please contact the identified source for permission first.

Some of the forms are specific to identified volunteer assignments (e.g. in schools, hospitals or information centres) and one is for a paid position (Red Cross Homemaker). It is hoped, however, that they will provide general information, helpful in producing materials for your own volunteer program.

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EVALUATION BY SUPERVISING STAFF

VOLUNTEER EXPERIENCE: DOCUMENTATION AND VERIFICATION FORM

SCHOOL/LOCATION: _____ DATE: _____

SUPERVISING STAFF MEMBER: _____

VOLUNTEER: _____

LENGTH OF COMMITMENT: From _____ To _____
_____ hours per week, for _____ weeks

1. Briefly describe the services provided by the volunteer:

2. Strengths and behaviours of volunteer:

	Excellent	Good	Satisfactory	Needs Improvement
- Punctuality and dependability	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Rapport with students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Rapport with adults	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Suitable role model	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Effective completion of assigned tasks	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
- Apparent enthusiasm for placement	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Comments:

3. Are there additional skills which would be helpful for the volunteer?

4. Should the volunteer be encouraged to continue in the volunteer program?

Yes No

Comments: Why or why not? _____

5. Were your expectations for this volunteer placement:

Fulfilled as planned Changed in process Not fulfilled

How? _____

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EVALUATION BY VOLUNTEER

REVIEW OF VOLUNTEER EXPERIENCE

SCHOOL/LOCATION: _____ DATE: _____

VOLUNTEER: _____

STAFF MEMBER: _____

1. Volunteer time given _____ hours per week for _____ weeks.

2. Brief description of activities as a volunteer: _____

3. Please rate the following:

	Excellent	Good	Satisfactory	Needs Improvement
a) Placement re interests/abilities	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
b) Orientation for assignment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
c) Training provided	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
d) Rapport with students	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
e) Rapport with staff	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
f) On-the-job supervision	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
g) Recognition	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

4. Expectations for placement:

Fulfilled Changed Not fulfilled

How? _____

5. Additional skills you would like to develop as a volunteer?

Yes No

Comments: _____

6. Do you plan to continue as a school volunteer?

Yes No

Why or why not? _____

7. How do you think the school volunteer experience might be improved?

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VOLUNTEER SELF-EVALUATION FORM

HOW AM I DOING?

1. Do I realize that my main purpose for being involved with an educational program should be to assist the staff in order that the students might achieve their personal best?
2. Do I take time to think about my role as a volunteer and approach supervising staff for feedback and on-going direction?
3. Do I accept feedback and suggestions in a constructive manner?
4. Do I give the teacher adequate notice of planned absences? Or, in the case of unexpected illness, do I contact the school office before classes begin?
5. Do I observe closely the techniques used by staff and follow through when I am working with students?
6. Do I give too much help to students rather than allowing them time to think?
7. Do I really listen to what the students have to say?
8. Do I observe carefully so as to know students' likes, dislikes, preferences, enthusiasms, aversions, etc.?
9. Do I find opportunities for giving students choices or do I tell them what to do?
10. Do I emphasize the times when students behave well and minimize the times when they fail to do so?
11. Do I try to develop a congenial attitude towards all those with whom I come in contact during my volunteer placement?
12. Do I avoid criticism of the student, staff and school?
13. Do I enjoy what I am doing?

Source: "Volunteers In Schools" 1987 - Manual for Volunteers by
Peterborough County Board of Education
Box 719,
Peterborough, Ontario
Canada. K9J 7A1

SAMPLE

EVALUATION BY VOLUNTEER

VOLUNTEER PROGRAMME EVALUATION - O.A.D.H.V.S.

1. Department where you volunteer _____

2. How would you rate your orientation? _____

3. How would you rate your orientation to your volunteer assignment?

4. Is staff receptive? _____

5. Do you feel your services are needed? _____

6. Do you feel that you could be doing more as a volunteer? _____

7. If you are dissatisfied with your assignment, do you feel free to discuss it with the staff in your department? _____

8. Would you come to Volunteer Services for reassignment if you are dissatisfied?

9. Do you understand the role of a volunteer? _____

10. Do you feel at any time you are being used to replace a staff person or doing most of their duties? _____

11. Do you have any suggestions for better or new ways of recruiting volunteers?

12. Do you have any suggestions for improving Volunteer Services?

Comments: _____

SAMPLE

EVALUATION BY STAFF RE VOLUNTEER PROGRAM

O.A.D.H.V.S.

TO: _____

FROM: _____

DATE: _____

We would like your assistance in evaluating the volunteer program in Nursing. Enclosed is the assignment description covering your department.

	YES	NO
1. Are the volunteers filling your needs within your department?		
2. Are the families and patients receptive to the volunteers?		
3. Is their attendance regular?		
4. Is your staff receptive to volunteers?		
5. Does your staff understand the role of the volunteer?		
6. Is the volunteer kept busy and not left without an assignment?		
7. If you see an immediate need for a volunteer after 4:30 p.m., would you call receptionist desk and have a volunteer paged from another unit? (Some volunteers cover all nursing units.)		
8. How could the volunteer programme be improved in your department. (See comments.)		
9. Would you be willing to evaluate the volunteers every two months with a form similar to this?		

COMMENTS

SAMPLE

EVALUATION BY STAFF RE INDIVIDUAL VOLUNTEER

STAFF - VOLUNTEER EVALUATION - O.A.D.H.V.S.

NAME OF VOLUNTEER: _____

AREA OF SERVICE: _____

SUPERVISOR(S): _____

Please give an evaluation of the service which this volunteer gave to your department. (Confidential)

Constructive suggestions/criticisms will help us improve our programme. These will be welcomed by our evaluation committee for either the Adult or Junior Volunteer Programme. Thank you.

Signature

LINK INFORMATION CENTRE

APPRAISAL FORM A - (VOLUNTEER PERFORMANCE)

JOB: Telephone Counsellor

- TASKS: (Refer to Job Description)
1. Answer telephone enquiries
 2. Call agencies to update resource file
 3. Maintain resource file
 4. Maintain statistical reporting system

RELEVANT BEHAVIOUR	
POSITIVE	NEGATIVE
<p>1. Probes and recognizes underlying problems.</p> <p>Identifies appropriate resources and counsels user on their use.</p> <p>Encourages user to return for help</p> <p>2. Contacts the person authorized to provide information</p> <p>Probes for detailed information.</p> <p>When in doubt, tracks down other sources for corroboration.</p> <p>Takes initiative to follow-up changes outside routine updating.</p> <p>3. Reports information accurately as soon as received.</p> <p>4. Reports statistical information from user as soon as received.</p> <p>Is careful and accurate in reporting statistics.</p> <p>Assists with tabulation and analysis of results.</p>	<p>Does not display sensitivity in identifying problems.</p> <p>Offers limited range or inappropriate resources without assessing choices.</p> <p>Closes off without leaving door open.</p> <p>Contacts anyone available, regardless of knowledge.</p> <p>Takes information without questioning.</p> <p>Leaves initiative for corroboration with other party.</p> <p>Keeps to routine updating schedule.</p> <p>Does not report updated information immediately.</p> <p>Delays in reporting user statistics.</p> <p>Makes many mistakes and is careless, fails to make use of the data dictionary when needed.</p> <p>Does not make effort to contribute to the total results.</p>

SUMMARY OF PERFORMANCE:

SUGGESTION FOR IMPROVEMENT:

Signed: _____
Supervisor

Employee/Volunteer

Date: _____

Thinking along the lines shown in Form A can help the appraiser and appraised staff member to focus their observations when using a general form such as:

LINK INFORMATION CENTRE

APPRAISAL FORM B - (VOLUNTEER PERFORMANCE)

A general appraisal of staff performance, developed through mutual discussion between supervisor and staff member or volunteer, during a review point which may be quarterly, semi-annual or annual.

Beginning of Review Report:

1. What performance is expected of the employee/volunteer? _____

• The major responsibilities (or tasks) of the staff member/volunteer and the goals for each? _____

• The standards of performance or results expected? _____

2. What support or training would help to achieve effective performance? _____

End of Review Period:

1. What results were achieved? Explain over and underachievement. _____

2. What is needed to improve low achievement? _____

3. What, if any, support or training was given during the period? _____

What effect did it have? _____

4. What were the volunteer's/staff member's main strong points during the period? _____

5. What were the volunteer's/staff member's weak points during the period? _____

LINK INFORMATION CENTRE - APPRAISAL FORM B - (VOLUNTEER PERFORMANCE) (Cont'd)

End of Review Period: (Cont'd)

6. How might the weak performance be corrected? _____

7. What is the superior's overall evaluation of performance of the staff member/volunteer? _____

Does the staff member/volunteer concur? _____

8. What training opportunities are needed in order to improve performance? _____

In relation to which tasks? _____

9. Main strengths and weaknesses of the employee/volunteer: _____

10. Overall assessment of performance: _____

11. Comments of evaluator: _____

12. Comments of staff member/volunteer: _____

Signatures: _____
Supervisor Employee/Volunteer

Date: _____

LINK INFORMATION CENTRE

APPRAISAL FORM C - (SELF APPRAISAL)

How would you rate yourself in the following area?

WORK MANAGEMENT	Low					High
Attendance for assigned shifts	1	2	3	4	5	
Punctuality	1	2	3	4	5	
Completion of worksheets	1	2	3	4	5	
Quality of writing or record keeping	1	2	3	4	5	
Sharing of new information	1	2	3	4	5	
Relationship with other volunteers	1	2	3	4	5	
Resourcefulness in locating information	1	2	3	4	5	

ATTITUDES TOWARDS PATRONS	Low					High
Ability to listen and empathize	1	2	3	4	5	
Quality of patience and acceptance	1	2	3	4	5	
Ability to give encouragement and support	1	2	3	4	5	
Ability to remain non-judgemental	1	2	3	4	5	
Purposefulness in contact with patron	1	2	3	4	5	
Calmness in dealing with crisis	1	2	3	4	5	

DIRECT WORK WITH PATRONS	Low					High
Ability to engage patron's participation	1	2	3	4	5	
Ability to obtain facts from client	1	2	3	4	5	
Ability to handle patron's feelings	1	2	3	4	5	
Encourage patron to work towards solution	1	2	3	4	5	
Ability to give focus to the contract	1	2	3	4	5	
Ability to terminate the contract	1	2	3	4	5	

LEARNING	Low					High
Understanding of the role of LINK	1	2	3	4	5	
Understanding network of community services	1	2	3	4	5	
Openness to learning	1	2	3	4	5	
Initiative to make learning needs known	1	2	3	4	5	
Dependence on supervision	1	2	3	4	5	
Pace of learning	1	2	3	4	5	
Ability to take on additional responsibility	1	2	3	4	5	

SUPERVISION
 In this section, please comment on your feelings about constructive criticism, and how you would feel about reviewing your record sheets with the supervisor, as a learning experience.

460 Jarvis St.
 Toronto, Ontario.
 Canada.
 M4Y 2H5.

**Canadian Red Cross Society
 Ontario Division
 Homemaker Service
 Homemaker Performance Evaluation**

Name		Branch		
Date employed	Date of last evaluation	Date of present evaluation		

		Exceptional	Meets Acceptable Standard	Needs Improvement	Unsatisfactory
A. PERFORMANCE					
1. Thoroughness					
2. Organization & Efficiency					
3. Punctuality					
4. Dependability					
5. Consistency					
6. Initiative					
7. Grooming					
8. Planning and Preparing Meals					
9. Reporting of Hours Worked - time cards accurate and prompt					
10. Teaching and demonstration					
11. Reporting re Clients - appropriate and prompt					
B. ATTITUDES AND INTERPERSONAL RELATIONSHIPS					
1. Has an understanding of needs of each client/family					
2. Has self-awareness					
3. Is discrete and tactful - understands confidentiality					
4. Is adaptable to changes in cases					
5. Is adaptable to changes in schedule					

		Exceptional	Meets Acceptable Standard	Needs Improvement	Unsatisfactory
6. Is non-judgemental					
7. Develops good working relationships with other professionals in the home					
8. Develops good relationships with other homemakers					
9. Has the ability to work with a) young children					
b) older children					
c) adults					
d) other					
C. USE OF SUPERVISION					
1. Understands and follows directions correctly					
2. Seeks guidance appropriately					
3. Responds well to guidance from supervisor					
D. KNOWLEDGE					
1. Of human needs and behaviour					
2. Of meal planning and preparation					
3. Of specific tasks a) home management					
b) personal care					
4. Of Red Cross policies					
E. TRAINING					
1. Attends in-service training sessions					
2. Seeks additional training, reads additional material					

IN-DEPTH EVALUATIONS OF ENTIRE VOLUNTEER PROGRAM BY:

- I. CO-ORDINATOR
- II. LINE STAFF
- III. VOLUNTEER
- IV. CLIENT
- V. MANAGEMENT

PART I (To be completed by the Co-ordinator)

- (xx) Place two checks if it's true for you.
- (x) Place one check if it's partly true or you are uncertain.
Leave the line blank if it is not true.

1. Spent enough time planning our program, before it started, carefully consulting all relevant people _____
2. We have written volunteer job descriptions, giving enough details of the type of work _____
3. At least half of our volunteers are personally and consistently involved working directly with clients _____
4. Before accepting volunteers, we use and study a volunteer background registration form _____
5. Each volunteer is interviewed at least once before acceptance _____
6. We have in-service training meetings monthly or more often _____
7. Each new volunteer receives and keeps a written orientation manual _____
8. Systematic effort to orient staff to working with volunteers _____
9. We deliberately seek maximum compatibility of volunteer and client by asking and assessing both volunteer and client _____
10. In addition to intuition, we employ specific compatibility criteria such as home location, interests, sex, age, etc. _____
11. Volunteers sign or explicitly assent to a work contract of specific time commitment over a maximum period of at least eight months _____
12. We have a regular position of Volunteer Co-ordinator or Director _____
13. He or she feels he has enough time to do the job adequately _____
14. Our Volunteer Co-ordinator has an office near other staff and is regularly invited to attend staff meetings at the supervisory level _____

PART 1 (Cont'd)

15. Each volunteer has an I.D. card or lapel pin or other suitable agency identification _____
16. Volunteers have a desk or other designated place to roost at agency _____
17. Provision for good, experienced volunteers to move up in responsibility and status as volunteers, e.g. head volunteer, volunteer advisory board, etc. _____
18. At least a third of our new volunteers are brought in by present volunteers _____
19. Within five minutes, we can tell you:
 - a) exactly how many volunteers we have and also;
 - b) for any individual volunteer, current address, job and assigned client, if any _____
20. Volunteers are required to report at least once a month by phone or by report form and we enforce this _____
21. Generally, volunteers are actively involved (e.g. advisory board) in decisions regarding their own volunteer program _____
22. We have a regular statistical-evaluative component supervised by a professional in the area _____
23. The agency prepares a regular, carefully considered budget, including the volunteer program _____
24. At least one-half of our volunteer program funding is incorporated in regular state or local agency budget _____
25. Agencies or organizations in similar service areas have expressed approval of our volunteer program _____

PART II (To be completed by the Line Staff)

1. How long have you had any sort of contact with the volunteer program?

2. How much time during an average week are you in any sort of contact with volunteers? _____ hours
3. What are the main different things volunteers do directly under your supervision?

4. In relation to the total number of clients (patients, consumers) served by your agency-organization, what would be the best or highest ratio of volunteer to clients you would want? (Choose the closest to right for you.)
 - a. One volunteer to 50 or more clients _____
 - b. One volunteer to 20 clients _____
 - c. One volunteer to 5 clients _____
 - d. One volunteer to 2 clients _____
 - e. One or more volunteers for every client _____
5. What concerns you more about the volunteer program? (Check one in each line.)
 - a. Insurance-liability OR b. Volunteer training
 - a. Volunteer turnover rate OR b. Spending too much time with volunteers
6. What jobs, if any, could volunteers usefully perform that they don't now?

7. What are some of the things you see as particularly helpful in the volunteer program?

8. What are the best ways of involving volunteers in your organization or agency? (Choose one on each line.)
 - a. Working directly with clients OR b. Administrative duties
 - a. Serving as individuals OR b. Serving as groups

PART III (To be completed by the Volunteer)

1. How long have you been in this volunteer program? _____
2. Please describe briefly your volunteer job(s) in this volunteer program

3. Where does your volunteer time go in an average month? (Please fill in all the lines as best you can.)

_____ hours total per month

_____ hours with clients, or otherwise on the job, per month

_____ hours consulting with regular staff per month

_____ hours in various volunteer meetings per month

_____ hours filling out reports, paperwork (not part of the job itself) per month
4. What are the main reasons you joined up as a volunteer?

5. What are some of the main satisfactions you're getting from your volunteer work now? _____

6. What are some of the main frustrations? _____

7. What do you see as some of the good things about this volunteer program now?

8. Has anyone in the organization ever asked you before what you thought of this volunteer program? (Please check the closest to right for you.)
 - No, never directly _____
 - Once or twice, maybe _____
 - Many times _____
9. When your present term or year of volunteer services is up, do you plan to sign up again or continue for another term? (Check one, please.)
 - Yes, definitely _____
 - No _____
 - Undecided at this time _____
10. Have you recommended joining this volunteer program to any of your friends or family?
 - Yes, definitely _____
 - No, not really _____
 - Gentle mention, might not have been a strong recommendation _____
11. For this volunteer program, would you please rate each of the things below on a scale of 0 to 5, using the following key:

0 = really doesn't exist 2 = fair 4 = good
1 = exists but poor 3 = average 5 = excellent

- Training of volunteers in this program	0	1	2	3	4	5
- Acceptance and support of volunteers by staff	0	1	2	3	4	5
- Recognition given to volunteer	0	1	2	3	4	5
- Volunteers are trusted to do important things	0	1	2	3	4	5

PART IV (To be completed by the Client)

1. What are some of the good things your volunteer does that help you?

2. What are some of the things your volunteer does that maybe don't help quite so much?

3. How often do you see your volunteer? _____

4. When was the last time your volunteer got in touch with you (by phone or in person)? _____ days ago.

5. Have you ever told your volunteer any real secrets about yourself, trusting that she or he will keep them secret? _____

6. Has your volunteer ever told you any secrets about himself/herself in the same way? _____

7. If you were offered the chance to be a volunteer in work like the volunteer you have now, what would you do? (Choose the closest to right for you.)

_____ I'd do it tomorrow
_____ I'd do it as soon as I got my own life well straightened out
_____ I might do it sometime in the next ten years
_____ It's not for me; I probably wouldn't do it at all

8. Do any of your friends want to have a volunteer like you have?

_____ Yes, I'm sure they do
_____ Maybe, but I'm not really sure
_____ No, as far as I know

PART V (To be completed by Management)

- (xx) Put two checks if the question is true for you.
(x) Put one check if you are uncertain or the question is partly true
Leave the line blank if it is not true for you.

- _____ 1. We have a volunteer program now in our agency.
- _____ 2. I prefer to have volunteers incorporated as unpaid workers within the agency, rather than as a semi-independent auxiliary outside it.
- _____ 3. I believe volunteers should be involved in every part of our operations, working with all paid staff. I do not believe volunteers should work primarily and only for the Director, Co-ordinator, Supervisor of volunteers.
- _____ 4. Volunteers do well enough handling confidential materials, I don't see that as a matter to be particularly concerned about.
- _____ 5. Volunteers can be found to help with professional level tasks, as well as more routine ones.
- _____ 6. The volunteer program co-ordinator or director has his or her own secretary or support person.
- _____ 7. Volunteers do have a room or desk space to call their own in our agency.

I am willing to spend significant amounts from our regular budget for extra volunteer program expenses such as:

- _____ 8. Mailing of notices.
- _____ 9. Reimbursement of some work-related expenses for volunteers.
- _____ 10. If our organization's budget were doubled next year, I would still have at least as many volunteers as we have now.
- _____ 11. Within three years or less, I think we can use and should have twice our present number of volunteers.

In regard to staff time which must be invested in a quality volunteer program, I am prepared to:

- _____ 12. Allow at least ten hours a month of staff orientation to volunteers in the first six months of the program, even if that necessitates some neglect of their other duties.
- _____ 13. We give appropriate recognition to line staff who agree to work with volunteers, seriously train and adjust their roles for this and successfully work with them. This includes, as a minimum, entry into their work records of their supervisory training and experience with volunteers, plus provision for clear and explicit recording in any merit or advancement rating system we have.

PART V (Cont'd)

- _____ 14. I give careful, if not preferential, attention to present or ex-volunteers in my agency, in the hiring of new paid staff, based on an objective assessment of their work record and experience as volunteers.
- _____ 15. I see that volunteers are provided with letters of work recommendation if they request them, or other appropriate work credit, for their use in applying for paid work anywhere else.

I personally am willing to:

- _____ 16. Appear at volunteer training sessions and recognition gatherings to welcome volunteers and express appreciation on behalf of our agency. This may be as many as 8 to 10 appearances a year.
- _____ 17. Participate directly on the volunteer program planning and/or advisory board as much as two hours a month.
- _____ 18. Our director or co-ordinator is a paid person.
- _____ 19. His/her level in administrative status is supervisory.
- _____ 20. He/she regularly attends and participates in staff meetings.
- _____ 21. I see the volunteer co-ordinator-director at least once a week, regularly, for direct communication on progress and problems in the program.
- _____ 22. We have a framework or mechanism for identifying and looking at any suggestions volunteers may have for agency's objectives or operations as a result of their work experience with us.
- _____ 23. We plan to have, eventually, at least one volunteer for every three consumers of our service (clients, patients, protégés).
- _____ 24. We plan to have, eventually, at least five volunteers for every paid staff member in the agency or organization.
- _____ 25. Eventually, I would definitely like to see some of our clients (consumer, patients) involved as volunteers.

Source: Volunteer: The National Centre For Citizen Involvement
P.O. Box 4179
Boulder, Colorado, USA 80306

EVALUATION BY VOLUNTEER

HOW DOES YOUR AGENCY RATE?

The following brief quiz --- a report card for adults --- should give you an indication of how your agency stacks up. Answer questions 1 through 12 with a "Yes" or "No". For an unqualified "Yes", score 2 points; for a "Yes" with reservations, 1 point; for "No", 0:

- 1. I was interviewed before being hired as a volunteer; the interviewer was aware of my talents and past experience and placed me in the right job. _____
- 2. Before I started to work, I was given the necessary training. _____
- 3. I work under a written agreement that clearly spells out my rights and responsibilities, including the days and hours I am expected to work (if applicable). _____
- 4. There is a director of volunteers to whom I am directly responsible and to whom I can go for guidance and for assistance. _____
- 5. I have been informed about the programs and policies of the agency. _____
- 6. Paid staff members respect me as a colleague. _____
- 7. Paper work or "red tape" takes a relatively small amount of my time. _____
- 8. I am reimbursed for out-of-pocket expenses connected to the job. _____
- 9. I receive the same insurance protection and the same benefits as the paid staff -- except, of course, for salary. _____
- 10. My work is evaluated regularly by my director. _____
- 11. I have made suggestions based on my experience in the agency, and my superiors have taken these suggestions seriously. _____
- 12. I would recruit those of my friends whom I think are capable and qualified for my agency's volunteer program. _____

The next question is rated separately. Check the answer that most clearly describes your reaction and add the corresponding number of points to your earlier score.

- 13. If I showed the results of the foregoing quiz to the director of my agency, we would both:
 - a) be pleased and proud _____ 10
 - b) agree that the score is valid, but feel confident conditions are improving _____ 5
 - c) be embarrassed _____ 0

If you scored a perfect 34 points, you are a satisfied volunteer. Less than 20 points, however, means you'll have to start educating your agency to understand your needs and those of your fellow volunteers.

"The unexamined life is not worth living", said Socrates. Were he alive in the era of the volunteer, he might have added, "the unexamined service is not worth giving".

Source: Education Resource Service, Volunteer Centre of Metropolitan Toronto
344 Bloor Street West, Suite 207, Toronto, Ontario, M5S 1W9,
Telephone (416) 961-6888.

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