

**Should Volunteers be Fired?**  
**A Policy Options Paper for Organizations.**

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**December 1991**

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## **Introduction**

Effective managers in public administration utilize many management tools available to them. Included in these tools is the option to fire volunteers. This paper will cover the topic of firing volunteers through examination of the following: volunteerism in the United States, options and alternatives to firing, consequences of firing volunteers. In addition, emphasis will be placed on the effective manager's use of the MacKenzie Volunteer Retention Cycle (1988).

## **Background**

In the 1960's and 70's, President John F. Kennedy began a renewal of volunteerism by establishing the Peace Corps. His immortal words still ring, "Ask not what your country can do for you, but what you can do for your country." In 1988, George Bush was elected president. During his campaign, he forwarded the volunteer concept through his vision of "The Thousand Points of Light." He was using a metaphor by referring to volunteers as stars in the sky.

Today, there are more volunteers than ever. In 1990, the Gallup Organization conducted a survey and found there were 100 million volunteers in America. This equates to 16 billion hours valued at over \$120 billion per year.<sup>1,2</sup> "This means that nearly every other adult in the United States volunteers time to nonprofit organizations. And according to the poll, each one works an average of four hours a week for their causes. Among those aged 35 to 44, a little over half were volunteers in 1988; by 1990 the figure stood at 64 percent."<sup>3</sup> Having taken into account the above factors, one thing is certain when involved in an organizations administration, there will be volunteers.

Although there have been many studies on volunteerism, society does not comprehend the magnitude of volunteerism and often takes volunteers for granted in their community.

**"Everyone, at one time or another, is a volunteer. Volunteering is so pervasive in the United States that it can be observed daily in just about every aspect of life. The problem is that volunteering, because it IS so pervasive, often goes unrecognized. For instance:**

**Who donates blood?**

**Who runs the PTA?**

**Who goes Christmas caroling in hospitals?**

**Who serves on school boards?**

**Who works to preserve historic landmarks?**

**Who trick-or-treats for UNICEF?**

**Who appears on fund-raising telethons?**

**Who passes out campaign leaflets?**

**Who uses ham radios to relay calls for help?**

**Who leads 4-H clubs? Scout Troops? Youth sports teams?**

**Who advocates less violence for television?**

**Who supports community orchestras?"<sup>4</sup>**

**This is an infinitesimal listing of ways in which individuals volunteer in the community. But this list gives an idea of how necessary volunteers are in our daily lives.**

**Among all the twinkling of President Bush's "Points of Light," there are some stars managers would rather wish away. How does the manager cope with the difficult volunteer? An excellent book, that examines this topic is, *Dealing with Difficult Volunteers*, by Marilyn MacKenzie. In her book, she presents the 'Volunteer Retention Cycle'. (Appendix I) The Volunteer Retention Cycle presents a series of steps the volunteer manager must follow sequentially to achieve success in a volunteer program.**

These steps are as follows: Pre-Recruitment, Recruitment, Interview, Selection/Placement, Orientation, Training, Review/Reassignment. By implementing this cycle in ones organization, the manager has laid the ground work for the possibility of firing volunteers.

### **Pre-Recruitment**

The first stage in the Volunteer Retention Cycle is Pre-Recruitment. MacKenzie states, "Managers of volunteers are like gardeners. Recruiting without preparation is like planting a delicate rose in hard unfriendly soil. Find out from the community through a needs assessment if:

- The service is needed by the community
- It fits the organization's mission and mandate.
- It can be ethically and safely delivered by volunteers
- An effective service is not currently available from another agency."<sup>5</sup>

"In the pre-recruitment phase, the manager is building commitment to the volunteer program S/he is both missionary and warrior, spreading the good news about the benefits of involving volunteers and eliminating barriers to their effective service. S/he must convince the Board, the staff, clients and even the volunteers themselves that they have an essential role to play. Trying to introduce volunteers to a program without the wholehearted support of Board and staff is simply not worth it."<sup>6</sup>

Also during this phase, job descriptions must be designed. How can volunteers know what there is to do or how to do something if there is no job description? MacKenzie also recommends, stamping "draft" on the job descriptions to emphasize that the job is ever changing. When the time comes to finalize the job descriptions, the effective manager should talk with the volunteers for their recommendations. Now that the pre-recruitment or foundation of the program has been set, the next step is to recruit the volunteers.

## **Recruitment**

Recruitment is summed in this phrase, "The right volunteer for the right job at the right time.

The steps to focused effective recruitment are:

1. Know the job to be done.
2. Determine the skills, knowledge and attitudes needed to get the job done right. (Appendix II)
3. Go where you'll find the people who possess those attributes.
4. Ask them to help you."<sup>7</sup>

## **Interview**

Some managers will be anxious about interviewing future volunteers. One should not, as this is the first step where future problem volunteers may be weeded out. Marlene Wilson, suggests that the interview "be looked at as a chat with a purpose."<sup>8</sup> After interviewing the potential volunteers, one must decide who will be selected and where they will be placed within the organization.

## **Placement/Selection**

Now the manager has a list of selected individuals that will fit into the organization. If there remains the least bit of doubt re-interview, re-check references, and have a colleague interview the individual. If still in doubt, don't select the individual. You are doing yourself, the organization and the volunteer a grave injustice if that individual were to be selected. A story from MacKenzie illuminates this idea graphically.

"She had completed an interview with a man interested in volunteering in a probation service. Something didn't seem right. She couldn't put her finger on it but there was an unexplained tension in the room. Instead of confirming his placement, she asked the man to return

the following day. At the door he turned and said casually, 'You don't mind, do you? When I work with these people, I like to carry my gun' He revealed a small hand gun."<sup>9</sup>

## **Orientation**

The manager has now selected the volunteers and must orient them to the organization. The orientation should include: an explanation of the organization's mission, how the volunteers fit in, what is expected from them and what they can expect from the organization. This would also be the time for volunteers to sign a contract. The contract would provide all the orientation information and also set an official policy for termination. (Appendix III)

## **Training**

Up to this point, the manager has followed the Volunteer Retention Cycle from focused recruitment through orientation. Focused training must be provided in the area in which the volunteer will work. These trainings can be accomplished in large or small groups, individually or by a mentor volunteer. Providing training will reduce potential problems and will result in an effective, happy volunteer. This leads us to review/reassignment.

## **Review/Reassignment**

All of the steps in this process are extremely critical for an effective volunteer program. But one of the steps that many organizations do not complete is the final crucial one of review and possible reassignment. (Appendix IV) This is also the stage where if necessary, a volunteer would be fired. Before that point is reached consider the following thoughts.

- How does a volunteer know if they are doing a good, fair or poor job if they are never evaluated?

- How can one fairly fire a volunteer who has not been evaluated and given a chance to mend their ways?
- If you were the person being fired, how would you feel?
- "If we evaluate when there is a problem so that we can fire someone-we are raising the tension level whenever we approach a volunteer to discuss how things are going. They will say "Oh oh,... that's it--the axe."<sup>10</sup>

The key to answering all of these questions is evaluation of volunteers on a regular basis. The best way for a manager to evaluate volunteers is in a private one-on-one setting. The evaluation should not be a one way dissertation. The manager should find out where they, as a manager or as an organization, need to improve the program. Having regular evaluations opens communications within the organization, makes the volunteer feel special and breaks down communication barriers

### **Alternatives/Options to Firing**

If the manager has followed the volunteer retention cycle and there are still a few volunteers who are causing problems, what now? Here is a list of alternatives/options a volunteer manager has before finally having to fire the individual. Steve McCurley and Sue Vineyard in their book, *101 Ideas for Volunteers Programs*, offer these suggestions.

- "•Re-supervise the volunteer.
- Re-assign the volunteer to a new staff person.
- Re-assign the volunteer to a new job.
- Retrain the volunteer to be able to do the job right.
- Re-vitalize the volunteer by giving them a sabbatical.
- Re-motivate the volunteer.
- Rotate the volunteer to new setting.



- Refer the volunteer to another agency.
- Retire the volunteer with honor."<sup>11</sup>

Another less palatable, yet plausible alternative is to "Turkey Farm"<sup>12</sup> the individual. Turkey Farming involves concentrating incompetence in a single location. Those individuals in the turkey farm are given the least essential jobs in the organization. One may find these individuals will be happy in the farm, or they will get the message their work has been substandard and will either, improve or quit the organization.

Many organizations now require volunteers to sign a contract specifying obligations the volunteer must fulfil to continue to be part of the organization (number of hours they must volunteer, appropriate dress, responsibilities, additional training, etc.). As long as the organization has fulfilled its part of the contract, the volunteers can be approached to find out why they have not fulfilled their part of the contract. In the contract there should also be a statement for dismissal for non-compliance to the contract. This gives the organization an "easy way" to get rid of non-productive volunteers. Firing also sends a message to the volunteers that everyone is expected to fulfil their obligation and that the organization is evaluating everyone using the same criteria.

Marilyn MacKenzie goes on to further state,

**"Handle any problems that arise promptly and swiftly. The problem will only get worse and then the small problem is now a big problem.**

**Reprimands should be in a one-to-one setting.** All reprimands should be on a person to person basis in private. Emphasize the disapproval over the action not disapproval of the person.

**Explain what you had observed.** Explain what you had seen and ask for an explanation. Example: Effie, a long term volunteer with Food Bank program, is seen putting food n her own handbag.

**Don't-lecture Effie about the immorality of stealing from the poor.**

**Do-Take Effie aside and let her know you saw her putting food in her purse. Wait for Effie's explanation before laying blame.**

**Use job description to identify expected behavior.** If they are doing a poor job at answering the phone because of hearing problems perhaps they can file, photocopy, etc and still be very useful to the organization.

**Tell volunteers one is committed to finding a solution to the problem.**  
"How can we work together to lessen or eliminate this problem"

**Arrange a follow-up.** Set a time two days, two weeks, etc. agreeable and find out how the problem is at that time. If the problem can't be solved in the time frame it is probably best to fire the employee."<sup>13</sup>

In September of 1991 this author participated in the following conference: INTERACTION-Focus on Volunteers in the Public Garden at the Chicago Botanic Garden. During discussions at the conference topics were raised in relation to older volunteers. What options does a manager have for volunteers who are losing mental capacity (Alzheimer's Disease), vision, hearing or motor skills. Here are two unique and innovative ways of dealing with this situation.

"A volunteer receptionist who is hard of hearing, gives bad information-volunteer director planned to enlarge reception desk and give her a buddy."<sup>14</sup>

"Another individual doesn't want to dump a volunteer who has given much loyalty to the organization-be sure the person really wants to continue...Give them a retirement banquet so they go out in a bang. They can still help out but this will give them a graceful exit also".<sup>15</sup>

In concluding the section on Alternatives/Options to Firing, "remember, the outcome of any meeting with a volunteer should be an action plan...you should put a time frame on when you will get back together to discuss whether the solution you have worked out is working <sup>16</sup>." If these options do not result in needed changes in the volunteer the manager must go on to the final step. The volunteer should be fired.

## **Firing the Volunteer**

If one looks at this situation in reverse, "a volunteer can 'fire' an organization by not fulfilling their responsibilities."<sup>17</sup> So why shouldn't a volunteer who is not fulfilling their responsibilities to the organization be fired? It boils down to the question can a volunteer, who is not paid, be fired? The answer contained in the literature is YES. (Washburn, Newcommer, MacKenzie, McCurley, A.A.M.V., Geber, Ellis, Goodwill, Cauley, Buck, Tedrick, V.I.P.) Volunteers must be fired especially in situation where there has been drug, alcohol, physical or sexual abuse, theft or breach of confidentiality. Beyond these, the predominate thought in the literature is that volunteers should be treated the same as the professionally paid staff. If their performance is not what is expected, the relationship should be terminated. "Only when you deal with those volunteers who are not providing appropriate service are you supporting all those volunteers who ARE DOING THE JOB RIGHT."<sup>18</sup> The other idea one must consider is, "I'd better deal with this because otherwise I am giving negative recognition to everybody else. In fact, it says to everyone who is doing the job right, you're a sucker...and this isn't what we mean to say."<sup>18</sup>

Steve McCurley and Sue Vineyard in their book *101 Ideas for Volunteers Programs*, offer these excellent suggestions on how to fire a volunteer.

### **1. Provide clear forewarning and notice to volunteers that they may be terminated:**

- a. Have clear agency policies on termination.
- b. Make the policies reasonable and related to the work to be done.
- c. Include a policy of suspension.
- d. Tell volunteers about the policies in the orientation and training session.
- e. Give volunteers a copy of the policies as part of their personnel manual.

f. Make the policies specific to each volunteer by providing them an updated accurate, and measurable job description.

**2. Conduct an investigation of determination before firing a volunteer.**

a. Have a fair and objective investigator determine if policies were actually violated.

b. Never fire on the spot without conducting a investigation: use suspension clause to allow time to examine the situation.

c. Make sure you have proof of the violation of the agency policies, either through testimony of others or regular evaluations of the volunteers behavior that demonstrate unsatisfactory performance.

d. Also try to find out the volunteer's side of the story to determine if any extenuating circumstances exist.

e. Thoroughly document the investigation and its results.

**3. Apply the termination ruling fairly and equally.**

a. Establish a graduated punishment system: warnings for first offenses, or for minor transgressions, then more severe penalties.

b. Relate the degree of punishment to the level of offense.

c. Apply penalties even-handedly and without favoritism.

d. Allow for an appeals process.

e. Make use of a committee of peer volunteers to aid you."

Other suggestion include:

- One should not apologize for the termination, the volunteer manager was not the one who was not the cause of the problem.

- The entire process must be as private and confidential as possible. "Every effort must be made to perform the firing procedures through a face to

face meeting. The person or persons involved in the hiring process should also be involved in the firing process."<sup>19</sup>

- If possible ask the volunteer to resign quietly.
- If one can in good conscious, refer the volunteer to another agency or Voluntary Action Center.

(Appendix V)

### **Consequences /Postmortem of Firing a Volunteer**

When firing volunteers the "current legal opinion is volunteers should be treated, in terms of hiring and firing, with the same caution for civil rights as we do employees...In firing, the same holds true, you must document what you wanted the person to do and what they didn't want to do."<sup>20</sup>

Beyond civil rights the fired volunteer can create bad press for the organization in the community. But the consequences from not terminating the poor volunteer may be far worse for the program in the long run. In addition, the manager will possibly have a few sleepless nights since s/he feels partially responsible for the problem and must do the actual firing.

After firing the volunteer, "make sure the individual does not develop a negative attitude towards your organization. Staff should send a thank you letter recognition with plaque or other form of recognition is also recommended."<sup>21</sup> (Appendix VI)

### **Major Players in Implementing this Program**

The major players in the scenario are the board of directors, top administration, director of volunteers, staff and volunteers. This is first and foremost a top down decision. Once the pre-recruitment phase is complete, everyone in the organization will understand why the volunteer retention cycle must be followed. Once the players understand what changes need to be implemented through the new cycle and what will be accomplished, the resistance to the changes will be minimal.

## **Chances for Success in Implementation**

The chances for implementing the program cycle are extremely good once the major players understand the consequences for the organization if the volunteer program were to self-destruct.

## **Conclusion**

Volunteerism is ingrained into the very fiber of the American soul. Today, every other American adult volunteers their time with an organization. By following the volunteer retention cycle, the manager reduces the necessity to fire a volunteer. Before firing a volunteer, a review of the options and alternatives will probably result in the changes desired. If the options and alternatives are not successful, the volunteer should be fired using proper procedures and documentation. In the end, firing a volunteer may be THE most difficult job the manager may have to do. It sends a message to both paid and volunteer staff that everyone will be treated equally, fairly and with respect. By firing, the message is sent that the effective manager cares about the organization and the volunteers who give of their time for the betterment of the organization and community.

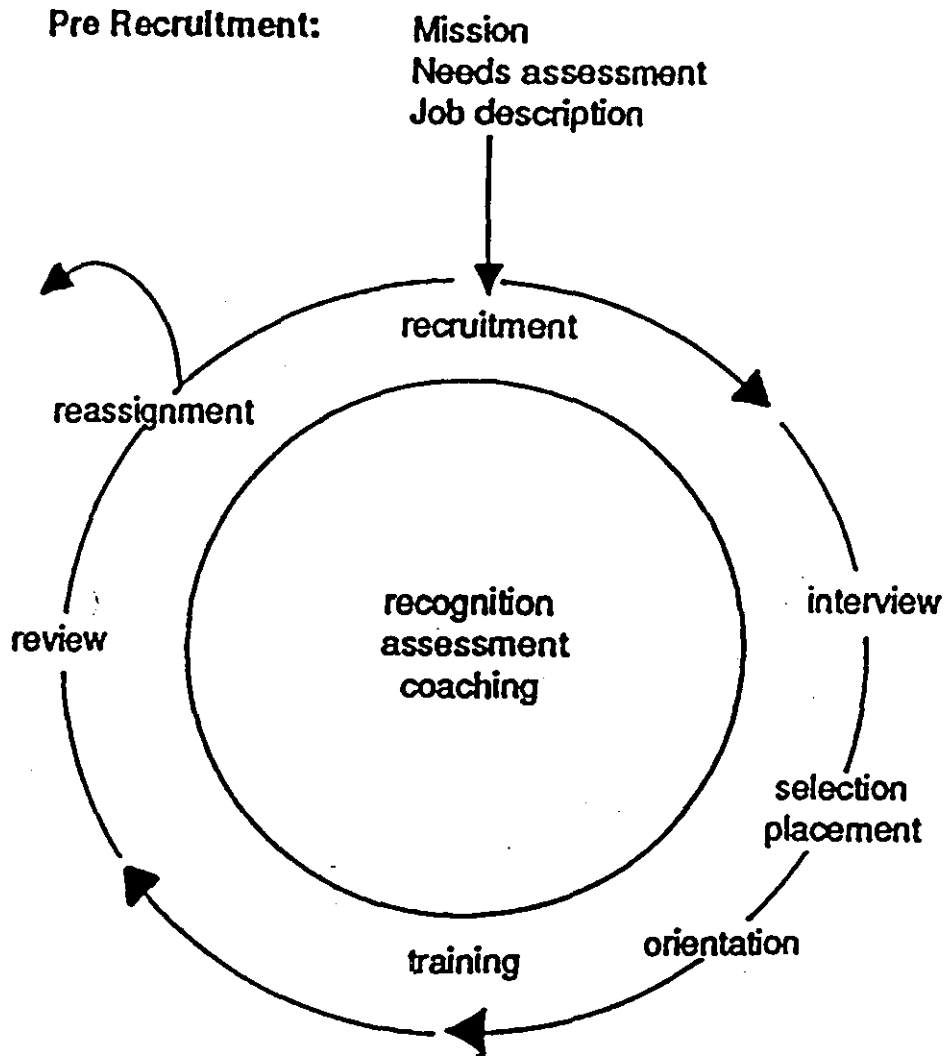
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## VOLUNTEER RETENTION CYCLE



© MacKenzie 1988: *Volunteer Management Series*

## Big Brothers/Big Sisters of Lancaster

### BB/BS OF LANCASTER COUNTY INC.

#### Volunteer Eligibility Requirements

1. Is a resident of Lancaster County for minimum 1 year
2. Is 20 years of age or older
3. Completes written application
4. Provides 4 references, one of which is a direct supervisor, if applicable; 3 other references must be from individuals unrelated to the prospective volunteer.
5. Completes Child Abuse Registry Check
6. Completes State Police Check
7. Completes a written personality profile
8. Allows a home visit
9. Demonstrates the following:
  - Ability to fulfill time commitment of 3-5 hours a week for minimum of 2 years
  - Satisfactory physical, mental and emotional health sufficient to perform the expectations and responsibilities of volunteer position
  - Stable employment history
  - Maturity
  - Responsibility
  - Motivation suitable to program expectations
  - Healthy integration of childhood and adolescent socialization and family life.
  - Adult sexual adjustment
  - Reasonable flexibility and tolerance
  - Ability to build and maintain meaningful interpersonal relationships
  - Ability to relate to and help a child.
  - Ability to work in a one-to-one, self-directed volunteer role with limited guidance
  - Home environment suitable for a child to visit
  - Commitment and ability to work within program expectations and guidelines
10. If any of the previous are in question, written consent to obtain information from an appropriate third party may be requested
11. Staff and Board members can apply to become a Big. All established eligibility criteria and intake procedure requirements must be met.

University of Florida

## POLICIES REGARDING FLORIDA MASTER GARDENERS

The title "Florida Master Gardener" is to be used only and exclusively in the Florida Cooperative Extension Service Master Gardener Program in which trained and certified Master Gardeners answer gardening questions. In addition to the University training, Master Gardeners have diagnostic support via county extension horticulturists and state extension specialists. Master Gardeners also are provided Cooperative Extension Service publications. Master Gardeners are expected to use the title only when doing unpaid volunteer educational work in the Extension Horticulture program.

Florida Master Gardeners are advised not to advertise their names or their place of business, nor to be listed on the advertisements of business places as Master Gardeners. This is a University of Florida - Florida Cooperative Extension Service public service program. Appearing as a commercial activity, having association with commercial products, or giving implied University or Extension Service endorsements of any product or place of business is improper.

In making recommendations which include the use of chemicals (e.g., insecticides, herbicides and fungicides), Florida Master Gardeners must follow published Cooperative Extension Service recommendations. Use of other pesticide recommendations is not approved. Cultural problems which are not specifically covered by Cooperative Extension Service recommendations may be handled by suggesting treatments which an experienced Master Gardener considers appropriate. Questions concerning commercial production of crops and pest control on such crops are to be referred to the local County Extension Agent.

A Florida Master Gardener must attend the prescribed hours of instruction and pass an examination administered by the Florida Cooperative Extension Service before becoming a certified Master Gardener. This certification is restrictive in nature in that it is valid only when the individual is participating in the Florida Master Gardener Program and for one year only. If an individual ceases active participation, then the certification as Master Gardener becomes void. New certifications will be issued each year only to those individuals who make a commitment for participation in the program for the coming year. Those not continuing in the program will not be re-certified and should be aware that if they represent themselves as Master Gardeners, they are violating their original commitment to the Florida Cooperative Extension Service.

All Master Gardener volunteers must recognize the necessity for representing the county Extension Service in a manner consistent with exemplary citizenship and leadership. Standards for Master Gardeners have been established to create a safe and pleasant learning environment for the Master Gardener program. In addition, procedures for due process are available from the Extension Agent for a Master Gardener to follow if he or she is charged with violating a standard and feels the charge is unfounded.

Master Gardeners are expected to participate in all components of the planned program, be responsive to the reasonable requests of the county agent in charge, and be respectful of the need for personal safety and the safety of others. Along with active participation, Master Gardeners are expected to uphold certain standards of behavior including, but not limited to the following -- there will be no: possession or use of alcohol or drugs in the workplace or on job assignments outside the Extension office; abuse or theft of public or personal property; sexual harassment or misconduct; verbal abuse and failure to cooperate with others, including other staff members and/or the public; possession of weapons or fireworks in the workplace; defamation of the organization; creating an implied or outright University or Extension Service

endorsement of any product or place of business; misrepresentation of sources of information; consistently giving out incorrect information; use of state and/or county vehicles without authorization; failure to report any and all injuries to the County Extension Agent as soon as possible or physical assault. Any violations will result in dismissal pending due process. Illegal activities will be referred to law enforcement.

The training and experience gained by participation in the Florida Master Gardener Program are valuable and may rightfully be listed and featured as qualifications when seeking employment. Once employed, and while serving as a paid employee, or if self-employed, Master Gardeners should not display credentials or give the appearance of being a Master Gardener at the place of business (unless the place of business is specifically designated as a Master Gardener Clinic location by the County Extension Agent).

Experienced Master Gardeners are likely to receive invitations to speak before groups. Gratuitous payments for speaking are not a concern since such speaking activity is entirely separate from the question-answering done at Master Gardener Clinics. However, please do not seek payment for such speaking appearances.

Your work is much appreciated by the Florida Cooperative Extension Service and your local area gardeners who have received or will receive your counsel.

Special note of Caution:

Individuals who are not acting on behalf of the Florida Cooperative Extension Service are strongly urged to make every effort to minimize the appearance of being on duty before making any recommendations in the area of horticulture. Speaking "off the record" is your right; however, make sure everyone knows you are speaking for yourself and not the Extension Service.

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I have read the above policies regarding my services as a Master Gardener volunteer and do hereby agree to give \_\_\_ hours of service to the Master Gardener Program in return for the training provided by the Florida Cooperative Service. In addition, I am aware there is a due process procedure available to me if I feel I have been wrongfully charged with a violation of program standards.

I have also read the state guidelines regarding active/inactive status of Master Gardeners and understand the recertification policy.

  
\_\_\_\_\_  
Dean of Extension Service

\_\_\_\_\_  
Signature of Applicant

\_\_\_\_\_  
County Extension Agent

\_\_\_\_\_  
Date



## PENN STATE COOPERATIVE EXTENSION CERTIFIED MASTER GARDENER PROGRAM POLICY STATEMENT

### PURPOSE:

Volunteers are recruited and trained to promote and expand Penn State Cooperative Extension's educational programs related to home horticulture. In addition to university training, Certified Master Gardeners have diagnostic support via extension agents and state extension specialists and are directly responsible to the supervising extension agent. Extension publications, teaching materials and/or other support materials will be provided as deemed appropriate by the extension office. Information presented under the auspices of Certified Master Gardeners must be consistent with current Penn State Cooperative Extension recommendations.

### QUALIFICATIONS:

1. Strong interest and background in horticulture as evidenced by scoring a minimum of 80% on the final exam administered by cooperative extension.
2. Dedication and willingness to serve fifty hours of volunteer service for Penn State Cooperative Extension within one year of training completion.
3. Willingness to undertake extensive training in home horticultural practices. Trainees may not miss more than one training session.
4. Flexible schedule which permits day and/or evening and/or weekend activities.

### EXPECTED COMMITMENT:

1. Perform the required number of volunteer hours for Penn State Cooperative Extension.
2. Prepare a monthly statistical report for the extension agent.
3. Attend meetings as scheduled to update information, discuss gardening problems and coordinate Master Gardener activities.
4. Participate in cooperative extension activities as needs arise.
5. Provide own transportation.

### TRAINING:

County Master Gardener Programs will offer core and elective training totaling a minimum of thirty hours.

### CORE CLASSES (all counties): 20 Hours

Master Gardener Orientation  
Plant Science  
Entomology  
Communication Skills

Soil Science  
Plant Pathology  
Plant Propagation  
IPM and Pesticide Safety

## Volunteer Performance Evaluation

NAME OF VOLUNTEER \_\_\_\_\_ ASSIGNMENT \_\_\_\_\_

- RATINGS: 1. EXCEEDS REQUIREMENTS  
 2. MEETS REQUIREMENTS  
 3. NEEDS IMPROVEMENT  
 4. DOES NOT MEET MINIMUM REQUIREMENTS

FACTORS CONSIDERED	RATINGS				COMMENTS
	1	2	3	4	

**JOB PERFORMANCE:**

Applies knowledge and techniques as taught	_____	_____	_____	_____	_____
Accepts feedback positively	_____	_____	_____	_____	_____
Asks questions, shares concerns and ideas	_____	_____	_____	_____	_____

**PEOPLE CONCERNS:**

Adheres to confidentiality policy	_____	_____	_____	_____	_____
Relates well to clients and staff	_____	_____	_____	_____	_____
Is friendly and sincere	_____	_____	_____	_____	_____
Is courteous and tactful	_____	_____	_____	_____	_____
Cooperates with staff and co-workers	_____	_____	_____	_____	_____
Is neat, well-groomed, adheres to dress code, wears name badge	_____	_____	_____	_____	_____

**RESPONSIBILITY & MOTIVATION:**

Is dependable (works as scheduled)	_____	_____	_____	_____	_____
Is punctual	_____	_____	_____	_____	_____
Is loyal, willing to accept responsibility	_____	_____	_____	_____	_____
Attends offered training and education programs	_____	_____	_____	_____	_____

VOLUNTEER'S SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

SUPERVISOR'S SIGNATURE \_\_\_\_\_ DATE: \_\_\_\_\_

### Master Gardener Procedure for Due Process

If a Master Gardener is found in violation of any of the program standards, he or she will receive written dismissal notification from their supervising County Extension Agent. If the Master Gardener feels that the charge against him or her is unjust and desires a hearing with the Review Board, a written request must be filed with the County Extension Director within 14 days following written notice of the violation.

#### Review Board

As stated previously, if a Master Gardener is accused of violating a standard, he or she has the right to appear before a Review Board, which will consist of the following members:

- the county extension director, who will serve as chairperson of the Review Board,
- another faculty member with volunteer responsibilities,
- the chairman of the horticulture advisory committee,
- and another Master Gardener randomly selected by the County Extension Director from the list of active Master Gardeners.

The Board may be convened at the direction of Extension officials or at the request of the Master Gardener involved. The Board must be convened within 30 days after receipt of a written request for a hearing. If a member of the Board is unable to attend, another member of the same rank may be selected from a neighboring county.

#### Purpose of the Review Board

The Master Gardener Review Board exists for the sole purpose of determining whether an infraction of Master Gardener program standards has occurred. If it is determined that no infraction has occurred, the Master Gardener will be allowed to remain in the program. If the Board determines that the Master Gardener is guilty of an infraction, he or she will be asked to leave the program.

#### Rights of the Accused

In proceeding with this process, the rights of the Master Gardener will be observed. These rights include:

- the right to be informed of the offense with which one is charged,
- the right to have an opportunity to face and cross-examine the accuser, and
- the right to have an opportunity to respond to the charges and to present evidence in one's own behalf.

#### Role of the County Extension Director on the Review Board

As chairperson of the Review Board, the County Extension Director:

- chairs the Board and is responsible for maintaining an atmosphere of order, objectivity and fairness while conducting an informal yet official hearing.
- informs the panel and the accused of the purpose of the hearing.

- advises Board members and the accused of the offense charged.
- ensures that persons not essential to the proceedings are excluded. Witnesses, other than the accused, are to be present in the hearing room only during their testimony.
- directs everyone present to treat the matter as confidential.
- permits the accused to make an opening statement.
- permits the accuser to make an opening statement.
- permits either party to present testimony of witnesses and to subject each other's witnesses to cross examination.
- permits Board members to question the parties so as to call for additional information.
- ensures that sufficient questions are asked to give the Board members enough information to make a decision.
- participates in deliberations, but does not vote.

#### Reaching a Determination

When the parties have completed their cases and the Board has no further questions, the Board will excuse all others so that deliberations can begin. The Board then determines by discussion and vote whether the accused committed the violation(s) charged.

The Board then calls in the accused and the County Extension Agent, and the County Extension Director announces the Board's decision. In addition, all parties receive written notification of the decision rendered.



STAFF EMPLOYEE FAILURE TO MEET  
ACCEPTABLE STANDARDS OF PERFORMANCETHE PENNSYLVANIA STATE UNIVERSITY  
POLICY MANUAL

(NOTE: This procedure does not apply to a new employee during the provisional period.)

PURPOSE:	To outline the steps to be taken by a supervisor when a staff exempt or staff nonexempt employee is failing to meet acceptable standards of performance as determined by the University and, in the judgment of the supervisor, formal action is warranted. A policy such as this is written for the very few cases in which a staff employee does not meet normal standards of performance. Reason and good judgment will be used in the application of this policy. This procedure does not grant substantive contractual rights to an employee.
PERFORMANCE IMPROVEMENT MEETINGS:	<p>A meeting between the employee and the supervisor shall be held in which the supervisor shall discuss wherein the employee is failing to meet acceptable standards of performance and, if the facts warrant, indicate that dismissal will result if such standards are not met. A future date shall be established by which the employee shall meet the acceptable standards. The supervisor shall give the employee a signed written summary indicating the date of the meeting and the points covered in the discussion.</p> <p>In addition, if the supervisor deems the circumstances serious enough that dismissal will result if acceptable standards are not met, the documentation shall so indicate. In such instance, copies also shall be given to the Dean or Administrative Officer, the designated Personnel Representative, and the University's Manager of Employee Relations. Additional meetings between the supervisor and employee may be held to review the employee's progress and, at the discretion of the supervisor, to extend the period within which the employee is to meet acceptable standards of performance.</p>
DISMISSAL OF EMPLOYEE:	<p>If the employee fails to meet acceptable standards of performance within the period designated by the supervisor or any extensions thereof, and the supervisor desires to proceed toward dismissal, a final meeting shall be held with the employee. However prior to this final meeting, appropriate approval must be obtained as outlined in the following section entitled "Responsibility for Dismissal". At the final meeting the supervisor shall review the manner in which the employee has failed to meet acceptable standards of performance, and inform the employee that approval for termination has been received and specify a future date of termination (normally not less than thirty (30) days from the date of the final meeting, except as provided below).</p> <p>A written summary of the final meeting shall be given to the employee by the supervisor with copies to the Dean or Administrative Officer, the designated Personnel Representative, and the Manager of Employee Relations. The written summary constitutes the employee's formal confirmation of termination.</p>
IMMEDIATE DISMISSAL:	If an employee is guilty of theft or other major act of misconduct, the supervisor shall recommend immediate dismissal.
RESPONSIBILITY FOR DISMISSAL:	Dismissal shall be only on recommendation to and approval by the Dean or Administrative Officer. However, the Dean or Administrative Officer shall review the dismissal with the University's Manager of Employee Relations before approving action.

## A GUIDELINE FOR COUNSELING WITH A 4-H VOLUNTEER

### Purpose

Several counties have experienced situations where a few volunteers are not performing as expected as a 4-H volunteer staff member. Potentially this could become serious causing damage to youth and/or to the 4-H program.

This guideline is to provide extension staff and the County 4-H Program Development Committee a reference for dealing with situations in which a volunteer staff member is seriously falling short of meeting expectations.

### Introduction

How can you counsel out a volunteer whom you have not hired? This question focuses on a key to working with "problem volunteers." An effective recruitment, education and support system for volunteer staff will help prevent problems that arise when volunteers are not matched with an appropriate role and not functioning as expected. In almost all problem cases expectations were not spelled out. (Role description and orientation was not provided.)

Even with an effective recruitment, education and support system there will be situations when a volunteer may need to be "counseled out" of a 4-H leadership role. With this in mind, we offer the following suggestions and comments:

### Factors to Consider:

1. Volunteer management runs smoothly when work is meaningful; when the needs and interests of volunteers are matched with the role performed. Interviewing and volunteer role descriptions help with this process.
2. The agent(s) and County 4-H Program Development Committee (4-H PDC) are partners in leading the 4-H program, which includes volunteer staff development. We encourage the 4-H PDC to help determine and measure volunteer staff expectations and deal with volunteer staff who are not functioning as expected.
3. When a problem situation starts to develop, try to deal with it as soon as appropriate. Consult with CED and 4-H PDC. Some "problems" just go away while others seem to fester and grow. Try to assess each situation and judge when and how to intervene.
4. In a problem situation, there are usually two or more points of view. Try to be as objective as possible.
5. Problem leaders are frequently an indicator of a volunteer staff development program that has not used sound education and management practices.

### Intervention Strategies

1. Steps should be progressive.
2. Consult with CED and Regional Director on the situation and your proposed plan before you talk with the 4-H PDC.
3. Document how the organization (4-H) has provided information that communicates what was expected of volunteer staff. (Role description - orientation and education.)
4. As accurately and objectively as possible, collect the "facts" of the situation so that an assessment can be made by extension staff and the 4-H PDC on the next step.
  - a) Discuss your perceptions of the problem with the volunteer as a first step in the process. Indicate to the volunteer what needs to be corrected. Observe the situation for a while.
5. If the problem persists, clearly communicate in writing and in person what is expected of the volunteer over a period of time and what behaviors (specific as possible) must be changed to continue. Also, remind the volunteer of #3 above. Before letter is sent, have a draft reviewed by CED, Regional Director and PSU legal counsel through Bill Devlin's office. We suggest the letter be signed by an extension professional and 4-H Program Development Committee or Extension Committee Chair.
6. During the time specified in the letter, counsel with the volunteer and determine if specific behaviors have changed. If so, the individual can continue. If not, indicate other possible volunteer roles, or a cessation of this role with a date specified.
7. If volunteer does not match a role in 4-H, follow up counseling with the volunteer in step 6 with a letter communicating the decision, signed by the extension professional and chair of 4-H PDC or Extension Board. Again, have CED, RD, and PSU legal counsel review the letter before it is sent.

### Major Misconduct of a Volunteer

If a volunteer is suspected of a major act of misconduct (immoral or illegal), report your suspicions immediately to CED and Regional Director to discuss appropriate actions. If you become aware of a volunteer who has a suspicious background, also inform your CED and Regional Director.

## Threat of Civil Suit

In some extreme situations, a volunteer or parent may threaten a civil suit against extension personnel, other extension volunteers, 4-H PDC, and/or Penn State. Several suggestions in dealing with the situation are offered below:

1. Keep CED and Regional Director informed of any pending situation you feel might develop. Be sure to visit with them as soon as you see the situation develop, so that if it becomes serious, they will be aware and will be a part of the process from the beginning.
2. Your Regional Director can arrange to have contact made with Risk Management in a civil suit situation and will share appropriate information and procedures with you.
3. Document interactions and other details of the situation as much as possible. Keep those items, such as notes of phone messages, individual visits regarding the situation, letters, etc. on file. Pinpoint dates and be as specific as possible.
4. In situations like this, emotions tend to be volatile. Be as objective and diplomatic as possible in dealing with the situation and remember that we are in the business of education.

## Liability Insurance for Agents and Volunteers

Penn State extension staff and faculty are covered by a general liability policy. Kenneth A. Williams of Risk Management made the following statement in a letter to Alan Snider, August 13, 1987, regarding extension agents working with volunteers:

"All University employees while acting within the scope of their duties with the University are insured by a general liability policy. This policy provides both bodily injury and personal injury coverages. Personal injury includes coverages such as libel, slander, and defamation. Extension employees while performing within the scope of their employment are protected by the University's insurance coverages."

Enrolled volunteer 4-H leaders are covered by the Pennsylvania 4-H Liability Insurance Program in those counties that have elected the coverage and pay the premium.

As stated in the Special Update, November 20, 1986, by J. David Ferris, president, of P. W. Wood and Son, Inc., the coverage is for general liability insurance for claims of negligence that result in bodily injury and/or property damage, which includes personal injury liability coverage for claims of libel, slander or false arrest. Volunteer 4-H leaders while participating in approved 4-H activities and their clubs and volunteer committee members in those counties that have elected the coverage and pay the premium are covered. The limit of coverage is \$1,000,000 per occurrence.

Ohio Society of Directors of Volunteer Services

**V-5**

**Letter Of Appreciation At Time Of Exit**

Dear *(volunteer)*:

On behalf of the Board of Trustees, the staff, and the clientele of *(organization)*, I would like to thank you for the *(total number)* hours you have given as a volunteer.

Many people have benefited from your efforts, and we hope that you have also gained rewards from your volunteer service with us.

If you find in the future that you can return to volunteer, please call us at *(phone number)*. We will be delighted to hear from you. Meanwhile, we wish you happiness in all you undertake.

Sincerely,

*(Name)*  
Director of Volunteer Services

## Volunteer Exit Questionnaire

ASSIGNMENT \_\_\_\_\_

I LEFT BECAUSE \_\_\_\_\_

THE MOST SATISFYING PART OF MY ASSIGNMENT WAS \_\_\_\_\_

THE LEAST SATISFYING PART OF MY ASSIGNMENT WAS \_\_\_\_\_

THE ORIENTATION AND TRAINING I RECEIVED WAS \_\_\_\_\_

TO IMPROVE THE PROGRAM I WOULD \_\_\_\_\_

I WOULD RETURN IF \_\_\_\_\_

COMMENTS: \_\_\_\_\_

SIGNATURE (OPTIONAL): \_\_\_\_\_ DATE: \_\_\_\_\_

Ohio Society of Directors of Volunteer Services

**V-7****Volunteer Exit Checklist**

VOLUNTEER'S NAME \_\_\_\_\_

SERVICE AREA \_\_\_\_\_

REASON FOR LEAVING \_\_\_\_\_

DATE OF LAST EVALUATION \_\_\_\_\_

EXIT INTERVIEW CONDUCTED:  YES  NO

DATE APPRECIATION LETTER AND EXIT QUESTIONNAIRE MAILED: \_\_\_\_\_

PHOTO/I.D. BADGE RETURNED:  YES  NO

## **Thank you**

I wish to thank the following individuals for providing me with information, assistance and insight on this topic.

Sally Allison-The Volunteer Center; Lancaster, Pennsylvania.

Susan Ellis-Energize Inc.; Wissahickon, Pennsylvania

Deborah Gregory-Penn State University; University Park, Pennsylvania.

Marian Neilsen-President, American Association for Museum Volunteers.

Kathleen Ruppert-University of Florida; Gainesville, Florida

Doreen Smith-Big Brothers/Big Sisters; Lancaster, Pennsylvania.



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American Association of Botanic Gardens and Arboreta  
AABGA  
786 Church Road  
Wayne, PA. 19087  
1-215-688-1120

American Association of Museums  
AAM  
1225 Eye Street, NW  
Washington, DC 20005  
1-202-289-1818

American Association for Museum Volunteers  
AAMV Administrative Office  
c/o American Association of Museums  
1225 Eye Street, NW  
Washington, DC 20005  
1-202-289-1818

Association for Volunteer Administration  
AVA  
P. O. Box 4584  
Boulder, CO. 80306  
1-303-497-0238

Public Management Institute  
PMI  
358 Brannan Street  
San Francisco, CA. 94107  
1-415-896-1900

Volunteer  
VOLUNTEER - The National Center  
1111 N. 19th Street, Ste. 500  
Arlington, VA. 22209  
1-703-276-0542

Volunteer and Information Agency, Inc.  
Volunteer and Information Agency  
The Volunteer Center for Greater New Orleans  
4747 Earhart Blvd., Ste. 105  
New Orleans, LA. 70115  
1-504-488-4636

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**THE VOLUNTEER CENTER  
RESOURCE LENDING LIBRARY**

630 Janet Avenue  
Lancaster, PA 17601  
(717) 299-3743

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The Volunteer Center has sample volunteer handbooks, volunteer program forms, and volunteer recruitment brochures.

Call the Volunteer Center for information on borrowing procedures.

8/90:rah