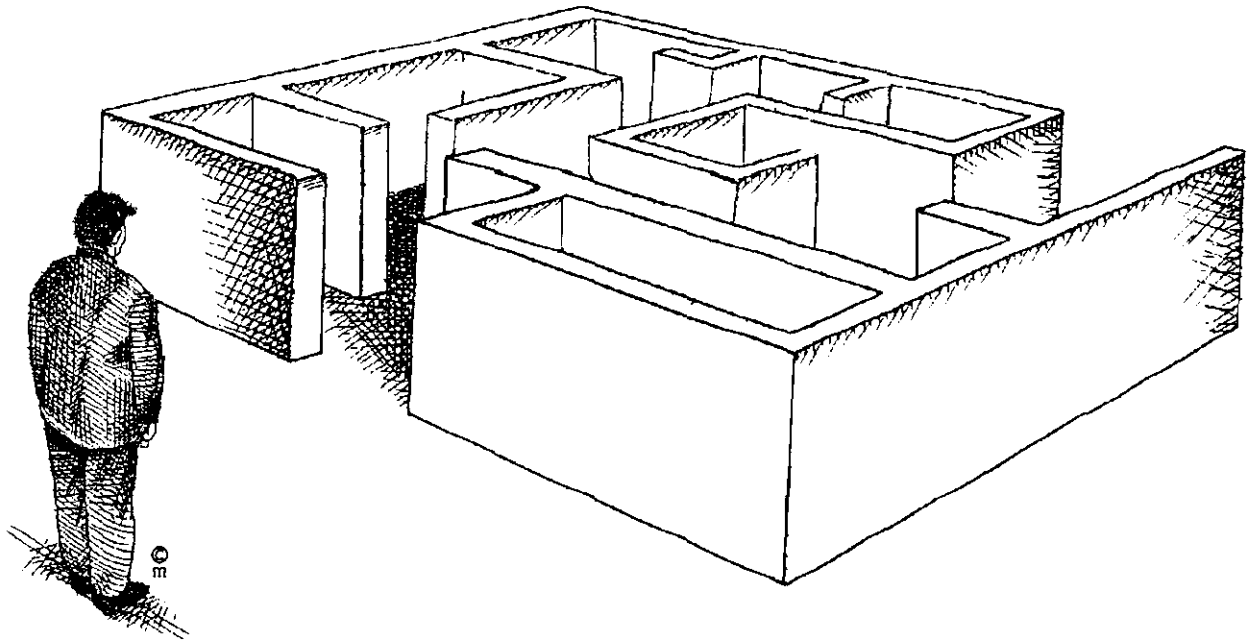


# **In the Eye of the Beholder: Customer Service for Volunteer Programs**



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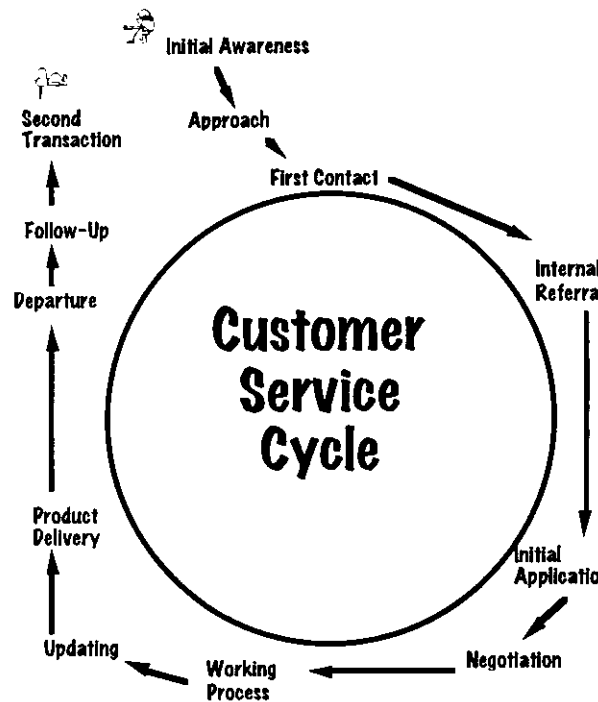
# Management

## Analyzing Customer Service in Volunteer Programs

Many years ago Jan Carlson, the head of Scandinavian Airlines, made an interesting observation about customer service. He noted that what was important in providing good service was not so much the absolute quality of the service as the *perception* that the customer had. This subtle observation explains why sometimes you can be confident that you are doing a good job only to discover that those you are providing it for have quite a different impression.

One way to avoid this problem is to conduct a periodic audit of your services from the perspective of the customer, "walking" through your system and looking at what you do and how you do it from the customer's point of view. This is most easily done by examining what are called "Moment of Truth," interactions with the customer that allow them to form an opinion, either good or bad, about the quality of the service being provided. Some of these critical impressions can be formed before you are even aware of the customer's existence; others are formed during interactions with you or members of your agency's staff.

The diagram on this page illustrates the flow of these Moments of Truth and the sequence of questions which follow are designed to prompt you to think about what the customer is seeing, experiencing and perceiving as they interact with you and your organization. One of the best ways to approach this analysis is to involve new volunteers, many of whom will have distinct memories of what they found to be unfamiliar or uncomfortable. While some of these items seem insignificant, each of them can create a barrier which leads to loss of volunteers.



### 1. Initial Approach

#### ◆ Initial Awareness

Does the potential volunteer have an impression of your organization and its operation before contact is made? What do others say about you? How does the potential volunteer learn enough about you to even know that you are a possible source of volunteer work? Is your descriptive material readily accessible? Does it outline what the volunteer can expect to receive and answer the initial questions that the volunteer is likely to have? Does it give the potential volunteer a reason to choose your organization rather than another one?

#### ◆ Approach

Is it easy for the potential volunteer to come to you? Are you located so that the volunteer can access you? Do you look approachable? Are there clear directions to guide volunteers to those who will begin to interact with them?

#### ◆ First Contact

How is the volunteer treated by the first person with whom they have contact? Does that person make them feel welcome? Can that person help them clarify their interest in volunteering? Does that person make them begin to understand the process through which they will

become involved? Does that person verbally express interest and gratitude?

### 2. Request for Service

#### ◆ Internal Referral

Are potential volunteers efficiently referred to others for assistance, without giving them the impression that they are being shunted off on someone else? Are they guided, rather than abandoned? If multiple referrals are neces-

sary to resolve a volunteer's question, is there a clear reason for this which is explained to them?

#### ◆ Initial Application

How is the potential volunteer initially treated by the person who will be responsible for working with them? Is the prospective volunteer made to feel important and welcomed, or do they feel like they are imposing? Is care taken to understand the volunteer's needs and perspective? Does the volunteer feel like they are the ones whose needs are paramount and that the intent of the organization is to bend all resources to make them feel satisfied?

#### ◆ Negotiation

During the negotiation process over the job to be performed, does the volunteer understand why the negotiation over time, screening requirements, etc. is taking place, and does the volunteer feel satisfied about the bargaining process and its outcomes? Does the volunteer feel that you are as interested in making this work for them as for you?

### 3. Working Process

#### ◆ Working Process

Does the volunteer understand the process through which the work will be rendered and their role in that process? Are the roles and responsibilities of others with whom the volunteer will be working clearly spelled out? Is the volunteer allowed to voice their opinions about how the work should be performed? Are these opinions regularly solicited? Does the volunteer feel a partner in what is going on?

#### ◆ Updating

Are efforts made to keep the volunteer informed about the progress of the work? Are these efforts initiated by the organization or does the volunteer have to perform them? Is the volunteer kept apprised of developments which will impact their ability to work? Is the volunteer invited to meetings in which the conduct of work is discussed and at which decisions are made? Does the volunteer participate in making these decisions? If key aspects of the work assignment change, is the volunteer informed of the need for these changes?

#### ◆ Delivery of Product

Is the volunteer given feedback about the performance of their work on a regular basis? Is this feedback designed to allow the volunteer to perform the work more effectively? Does the volunteer receive

supervisory time and attention? Is the volunteer recognized for their contribution on both a formal and informal basis? Is this recognition given in a way that shows respect for the volunteer? Is the volunteer asked to provide their own feedback about the quality of the work being performed?

### 4. Follow-Up

#### ◆ Departure

Does the volunteer perceive that the organization has enjoyed their participation and would like the volunteer to continue the relationship? Is the volunteer made to feel as though they may return to the organization, even if they are interested in changing their volunteer assignment? Are these options explained to the volunteer far enough in advance for them to consider their interests?

#### ◆ Follow-Up

Are attempts made to pro-actively contact volunteers who have completed their commitment to talk with them about services that have been rendered? Is additional information which might be helpful routinely sent to potential repeat volunteers? Are they kept on newsletter lists? Are they invited to activities or volunteer recognition events?

#### ◆ Second Transaction

How is the volunteer greeted and treated if they approach the organization for a second service? Are they remembered, recognized, greeted as old friends, or do they start all over again? Are records kept of volunteer service that will even identify who has volunteered before and indicate what they were involved in?

Performing this analysis can tell you a lot about why you may be "losing" volunteers, especially if you seem to have poor retention during the early stages of volunteer involvement. Remember the wise old saying: "You never get a second chance to make a good first impression." A potential volunteer who isn't made to feel welcome by a harried receptionist may form an impression of the agency that it never recovers from. A new volunteer who is ignored by busy staff on their first day at work will often conclude that they aren't really wanted. Some categories of volunteers, such as youth or minorities who are already uncertain about their reception by the organization, will be extremely sensitive to tell-tale behaviors which might reveal the true intent of the organization.

*Steve McCurley*

# Management

## Critical Incident Points in the Volunteer Life Cycle

### Introduction

Most studies of volunteer motivation have concentrated on examining the factors which will influence the decision to initiate volunteering. These factors are complex, as Miller notes: "a volunteer's involvement and satisfaction derive from a complex combination of the volunteer's personality, the nature of the volunteer activity, and the nature of the volunteer's other activities." These studies, however, are not particularly useful in then determining what factors might influence that same volunteer's decision to *continue* volunteering with that organization. This deficiency arises because initial motivations can be quite different from subsequent attitudes and behaviors, which are based on a wide variety of factors. Paul Ilsley in his invaluable series of interviews with volunteers found that:

*"Inexperienced volunteers, defined as those who have been in service for less than six months, usually can explain their reasons for volunteering without hesitation and can describe tangible ways in which they expect to be rewarded for their work... Experienced volunteers, by contrast, sometimes have difficulty explaining why they continue their work. A volunteer who had worked at a museum for fifteen years says, 'I've been here so long I can't remember why I stay.'"*

This situation is further complicated by the fact that the volunteer's motivations, reactions to their volunteer work and adjustment to other life factors will tend to change over time. Each of these changes can create a re-examination by the volunteer of their commitment.

Over the length of a volunteer's relationship with an organization there will tend to occur numerous critical incident points at which the volunteer will review their decision to remain as a volunteer. These points seem to have some predictability, both in time of occurrence and in the content of the factors that will influence the volunteer in either leaving or staying, but are often ignored in studies of volunteer motivation. Robert Dailey, writing in 1986, noted "researchers need to recognize there is a wide range of behaviors and attitudes that materialize and drive volunteer activity well after the decision to join and donate energy and time have been made."

This article reviews these critical points and suggests ways for a volunteer manager to positively influence the volunteer's decision during this process of self-examination.

### Initial Contact

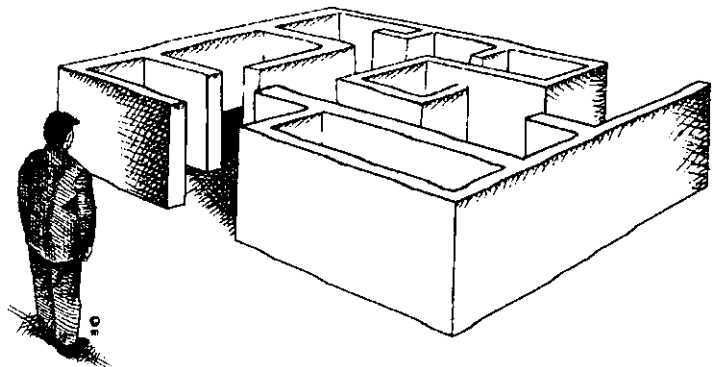
Often the opinions of a volunteer are shaped in the very first instance of contact with an organization. Examples of this initial contact might include:

- initial call to an agency about volunteering
- first meeting or interview with volunteer manager
- orientation session
- first day on volunteer job

During each of these moments, the volunteer is forming opinions about whether the somewhat risky move they are considering (offering themselves to a strange organization) is a wise choice. At this point, any feeling of discomfort is likely to be magnified in the mind of the volunteer, and any sense that the agency is indifferent or uninterested is highly likely to result in the volunteer ending the relationship as quickly as possible. At this early and quite fragile point in the relationship, the potential volunteer is highly attuned to any signs of welcome or of rejection.

Here are some suggestions for maximizing the likelihood of a volunteer getting a positive first impression:

1. Make sure that those answering the phone for your organization know about the volunteer program and project an organized and friendly attitude to callers asking about volunteering. All of those who first meet with a potential volunteer should project a sense of welcome and appreciation. As someone once noted, "You never get a second chance to make a good first impression"



2. Make sure that you get back to those who call about volunteer opportunities as quickly as possible. There is a substantial decay factor in volunteer enthusiasm over small amounts of time, and this decay can quickly lead to a firm conclusion that the agency isn't really interested. If you're too busy to process the volunteer's request, then at a minimum call to let them know you'll be back to them later and tell them when you will be re-contacting them.
3. When first meeting people, strive to give them a sense of understanding of the process they will be going through in applying to become a volunteer. This is especially important in these times when background checks can consume weeks. A volunteer who feels "lost" during this initial phase will quickly become lost.
4. Strive to give the new volunteer a sense of inclusion, establishing immediate social connections with staff and other volunteers. One simple way to do this is to walk them through the agency and introduce them to others, particularly those with whom they will be working.
5. Make the volunteer's first day on the job a ceremonial one, with an official greeting and thanks. This will tend to put the organizational seal of approval on the volunteer's decision.

### First Month

During their first month on the job, the volunteer is learning about the position to which they have been assigned. A volunteer manager should always view this initial matching as a hopeful but occasionally incorrect experiment, commonly based on a relatively short interview in which each participant is operating with a great deal of ignorance about the other. The primary factor influencing the volunteer during this critical time is one of "job comfort," i.e., do they feel capable and interested in the work now that they are actually learning what it is really about? Reality has replaced the job description. A volunteer who discovers that the position to which they have been assigned is not one in which they feel comfortable will start to disappear.

A smart volunteer manager can easily control any danger during this period by deliberately scheduling a "review interview" about 30 days after the initial placement. This interview, arranged at time of initial placement, is explained as an opportunity for the volunteer to really decide whether they like the job or not. The first month basically operates as a "test drive" for the volunteer to be exposed to the actual work and to determine whether they are comfortable with their ability and inter-

## McCurley's Law of Volunteer Retention

**The longer a volunteer is around the more likely they are to notice when the elements of good volunteer management are not in place. The honeymoon is over.**

est in continuing in that position.

While this creates some additional work for the volunteer manager it creates the ability to "fine-tune" placement decisions, based both on the volunteer's new knowledge about the work and the agency's new knowledge about the volunteer. As every experienced volunteer manager knows, making a "perfect match" in placement is essential for smooth working relationships.

### First Six Months

During the first six months the volunteer has an opportunity to examine and consider their developing relationship with the agency. Critical factors include:

- *Reality versus expectation.*  
Does the situation in which the volunteer is now engaged meet their expectations in a positive way? Is the volunteer getting what they thought they would get out of volunteering? Is the volunteer work vastly different from what they thought or what they were told during initial orientation and training? Do the clients and work environment meet the expectations of the volunteer?
- *Job fit.*  
Do the overall aspects of the job (client relations, work process, etc.) match with the volunteer's interests and abilities? Does the volunteer feel equal to the work and capable of achieving some success at it?
- *Life fit.*  
Does the volunteer work and its time and logistical requirements fit comfortably into the rest of the volunteer's life, work and relationships? Is the volunteer work too demanding or too intrusive?
- *Social fit.*  
Does the volunteer feel like they are becoming an accepted part of the organization's social environment? Do they feel respected and a part of the team? Are they finding friends and colleagues?

Possible solutions for helping a volunteer reach a positive conclusion during this period include:

1. Create a buddy or mentor system for new volunteers. These assigned colleagues will assume responsibility for answering any questions the volunteer has, helping them with their new roles, and introducing them to the



social fabric of the organization. Experienced volunteers make excellent buddies. Note, however, that being a buddy is different from being a supervisor. The role of the buddy is primarily to help the new person become comfortable, not to manage them.

2. Assume that you (or their supervisor) will need to allocate more time for communication with new volunteers and schedule yourself accordingly. Don't assume that the volunteer will come to you; instead, create opportunities to talk with the volunteer, even if it's just a "social call."
3. Schedule a 6-month review. This is not so much an evaluation as it is a chance to talk with the volunteer in a formal way about how they are feeling and whether they are enjoying themselves. If you have assigned the volunteer to work with a staff supervisor, this review is an excellent opportunity to see how that relationship is

developing.

4. Give the volunteer symbols of belonging to the organization. This can include a business card, their own voice or postal mail box, clothing and equipment, etc. These will tend to reinforce the notion of the volunteer that they are a part of the organization.

#### First Anniversary/End of Initial Term or Commitment

This is one of the most serious critical incident points, because the volunteer will have fulfilled their initial commitment and now must make an affirmative decision to renew that commitment as opposed to seeking a new volunteer opportunity.

Key factors for the volunteer at this time are:

*continued on page 14*

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## Volunteer Retention Studies

One of the best overall studies of volunteer involvement is *Older Volunteers: A Guide to Research and Practice* (Newbury Park: Sage Publications, 1993) by Lucy Rose Fisher and Kay Bannister Schaffer. The following excerpt lists some of the results from studies of volunteer retention.

*Table 6.2  
What Psychological Factors Account for Volunteer Commitment and Retention?*

Type of Study	Finding	References
Surveys of volunteers/literature review	If volunteers feel competent and successful in their volunteer efforts, they are more likely to continue volunteering than volunteers who feel rejected, incompetent, and/or frustrated	Brummel (1984), Houghland, Turner & Hendricks (1988), Leigh, Gerrish & Gillespie (1986), Midlarsky (1984), Morrow-Howell & Mui (1989)
Surveys of volunteers	Volunteers are more likely to continue volunteering if they find the job interesting	Brummel (1984), Dailey (1986), Jenner (1982), Pearce (1983)
Case studies of voluntary associations	The most active members are those who are most committed to the ideology of the organization	Chin (1989), Katz (1981)
Longitudinal studies of volunteers	Volunteers reach a critical transition time during the first few months of volunteering	Arella (1984), Gidron (1978)

Implications of research findings:

- To sustain the commitment of volunteers, it is important to provide for successful experiences so that the volunteer feels competent.
- Intrinsic rewards (designing jobs so that they are interesting to the volunteer) are critical to volunteer retention.
- Volunteer organizations need to recruit people who share their ideology and/or they need to offer training to inculcate appropriate values and ideology.
- New volunteers require careful attention and monitoring, especially after 3 to 6 months of service.

- *Bonding.*  
Has the volunteer developed favorable personal relationships with others in the organization? Does the volunteer have friends among other staff and volunteers?
- *Accomplishment/Expectation.*  
In reviewing their tenure, does the volunteer feel that they have accomplished what they thought they would accomplish during the job? Does the volunteer feel successful, or do they feel that they have "failed" to achieve what they wanted, either in serving the community or helping a particular client?
- *Opportunity for growth.*  
In contemplating continuation of the volunteer work, does the volunteer look forward with anticipation or do they feel that the work will simply be more of the same? Does the volunteer feel that they have the opportunity for continued challenge in the job or does it appear boring?

Here are some management actions to assist a volunteer at this stage:

1. Develop a "volunteer growth plan" for each volunteer. This plan, developed with and by each volunteer, will chart out how the volunteer is feeling about their work and what might be done to re-kindle their interest if it is flagging. We've included a sample set of volunteer growth questions on page 14.
2. Celebrate the volunteer's term of service, finding a way to show them what they have accomplished and how they are appreciated. Have testimonials from those with whom they have been working and examples of their accomplishments. Do not make the party seem like you're giving them the gold retirement watch; instead make the theme "Many Happy Returns."
3. Make sure the volunteer has an opportunity to see the results of their work and of the overall work of the organization, preferably in a face-to-face encounter than conveys the real impact. A 1990 study of crisis center volunteers found a substantial difference in average volunteer tenure in centers where volunteers had opportunities for face-to-face interventions with clients over those where the volunteers had little client contact. Always remember that the ultimate impact on the client is part of a volunteer motivation, and it is difficult to feel motivated when you never know the results.



Organizations which engage in outcome-based evaluations should be sure to inform volunteers about the results of these evaluations.

4. Strengthen the bonds of the volunteer to the organization by giving token items which symbolize "belonging." These can include a photo album of them working with others or mementos of past work.
5. Talk frankly to the volunteer about whether they are still enjoying their work. Many volunteers will be reluctant to tell you this, either out of a fear of seeming to let the organization down or a fear of seeming to criticize those with whom they work. Strive for an understanding with the volunteer that this discussion is not about "failure," but about "renewal," an opportunity to be even more successful in the future.
6. Be prepared with a number of different options for the volunteer which can serve to re-kindle the sense of excitement they once had. These might include a change to a new position, a "promotion" in their current position, or even a sabbatical to step aside from

their volunteer work and gain a new perspective or just a feeling of re-invigoration. Volunteers can easily be "promoted" by giving them additional responsibilities such as assisting in training other volunteers, serving as mentors or resources, etc.

#### Longer Term

In the longer term, individual volunteers will face additional critical incident points. These are not always predictable, occurring at different times for different volunteers. Here are some of the factors that will create these incidents:

- *Job Adjustment.*

If the volunteer's job changes in any substantial way. This could include a change in the client to whom the volunteer is assigned or a change in the staff with whom the volunteer is working. It can very often include a change in the status of some other volunteer with whom there is a close attachment.

- *Life Fit.*

As the volunteer ages, their own life and needs will change. Critical change points include birth of children, change in paid work, marriage, death of spouse, retirement, etc. As Pearce noted in 1993, "Volunteers may quit because of personal changes, such as moving or returning to work or school. Since volunteering is often viewed as a peripheral activity, it may be influenced more heavily by outside events than employment is." A volunteer manager should stay attuned to how the volunteer's own life is going, since major changes in it will create critical examination of

## **Developing a Volunteer Growth Plan Key Exploratory Questions**

*The following questions are designed to help you talk with a volunteer about their own growth and development in their volunteer position. The questions give you information and insight as to the level of satisfaction the volunteer has in their volunteer position and whether and where the volunteer might better be motivated. The questions are intended as a guide for discussion, not as a form to be completed and ignored.*

### **Work Satisfaction Questions**

1. What were you hoping to accomplish in your volunteer work this year?
2. What were your greatest accomplishments while volunteering this year?
3. What was your greatest frustration while volunteering this year?
4. What would you do differently if you were to do your volunteer work over again this year?
5. What strengths, skills or talents did you discover or strengthen this year?
6. How challenging and interesting do you find your work at this time?

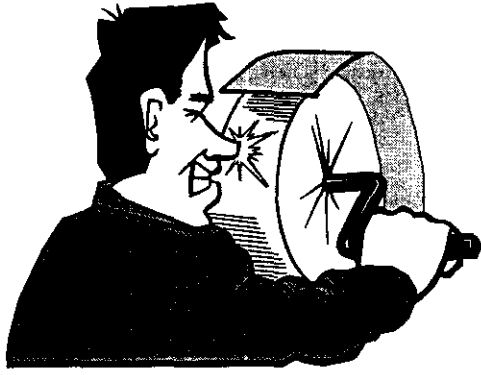
### **Personal Satisfaction Questions**

1. What do you find most rewarding about volunteering here?
2. What new friendships did you make here this year?
3. How well do you think we are accomplishing our mission?
4. What is your vision for what we ought to be doing to be more successful in the next 5 years?

### **Future Growth Questions**

1. What do you want to accomplish in your work next year?
2. What do you want to accomplish personally next year?
3. How can we best help you accomplish these goals?
4. What kind of volunteer work would most help you attain these goals?
5. What training or experience can we offer you to make you better able to do your work?
5. How can we make your time here more fulfilling?





the volunteer's involvement with the agency.

Two strategies are crucial in ensuring that volunteers remain committed during these changes:

1. *Giving volunteers a sense of empowerment in shaping their volunteer work.* If volunteers know they can discuss their work and have the opportunity to re-design it to fit a changing situation, they are more likely to remain.
2. *Making each volunteer a "true believer" in the cause of the organization.* Perhaps the greatest factor in volunteer retention is the extent to which the volunteer truly believes in the work being done by the organization. Volunteers who initially join for other reasons (social factors, job experience, etc.) should be deliberately engaged in conversations about the need for the agency and its work.

A 1995 study of volunteer ombudsmen revealed that this last factor has major importance. As they noted: "Because organizational commitment is based on volunteer attachment to organizational ideals, a volunteer program manager must take great care to communicate the organization's philosophy. It is the essential, inspiring vision that binds the program's character, social role, goals, and objectives to the volunteer's self-image."

While the above may seem like additional work, they are designed to allow the volunteer manager to concentrate on an essential task - retaining good volunteers. It is expensive and time-consuming for an agency to always be recruiting new volunteers. To determine whether you need to pay more attention to volunteer retention you might consider keeping retention statistics on your volunteers, and, in particular, graphing the approximate timeframe of their points of departure. If you begin to see clusters of departures around the timeframes above, then improving your statistics can be a simple task.

In essence this process requires looking at your volunteers on a longitudinal basis, remembering that, like all of us, they are likely to grow and change over time. Since volunteering depends upon meeting both the needs and circumstances of the volunteer, it makes sense that volunteer management will need to adjust to changes in those needs and circumstances.

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