



VIRGINIA DIVISION OF VOLUNTEERISM

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PREFACE

Program development is a creative and challenging process that either brings forth the best in people or leaves them standing in awe of those who bridge the gap between inspiration and reality. Volunteer program development is no exception.

This monograph is designed to spur the imaginations of those individuals who are exploring the possibilities of volunteer involvement, particularly within the financial services setting. Outlined according to the basic steps of volunteer management, the following pages describe an exciting new approach taken by the Financial Services Bureau of the Newport News Department of Social Services.

Traditionally, volunteers in departments of social services have assisted paid staff in service programs such as foster care, child protection, adult services, and adoption. Recently, however, eligibility workers at the Newport News Department of Social Services identified tasks that volunteers could perform within the financial assistance programs. The result is the Financial Services Volunteer Project which involves volunteers in all aspects of eligibility determination, except actually authorizing the amount of assistance.

This monograph details, step by step, how the Newport News D.S.S. volunteer coordinator and eligibility units developed the Financial Services Volunteer Program.

Chapter I

PROGRAM RATIONALE

The Newport News Financial Services Volunteer Project has two goals which have guided the entire project from its inception. These are: (1) to provide better service to the clients; and (2) to process client applications more quickly and effectively.

In order to utilize volunteers to accomplish these goals, agency staff had to identify tasks that were both appropriate and realistic. The agency's managers believed any volunteer with the requisite knowledge, skills, and abilities could fill any capacity in the agency, excluding those responsibilities prohibited by statute or departmental policy.

Consequently, volunteers in financial services are incorporated into all aspects of the program with the exception of actually authorizing the amount of financial assistance or processing the determination form. Volunteers orient clients about financial services and eligibility requirements, conduct intake, complete paperwork, and utilize the computer for recordkeeping. This total integration into agency work enables both paid and volunteer staff to cooperate as a team and make the program a success.

Equally important, all paid staff have the opportunity to utilize volunteers in their work. Actual assignments are dictated by the needs of the individual, but everyone is encouraged to utilize volunteers. The paid staff's positive attitude has been a key ingredient in the project's success.

Benefits

Since a volunteer program calls for staff time and energy to organize and coordinate, one might question whether the benefits derived from such a program are proportionate to the agency investment. The Newport News Department of Social Services is convinced that the time spent to delegate and supervise the work of volunteers is far less than the time it would take staff to do the work themselves. Furthermore, the department is satisfied that public assistance clients are better served. The program's aim is to eventually increase the staff/client ratio so that application and redetermination processes are expedited and clients receive more attention; this goal is being met.

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The eligibility workers enjoy the benefit of an expanded role beyond that of simple caseload management. The supervisory experience they have gained by working with volunteers is tangible evidence of their skills in supervision and human resource management as they prepare for promotional opportunities.

Finally, the agency appreciates that it is providing an opportunity for volunteers to gain new skills, learn about public assistance programs, and be part of the helping process. In turn, the volunteers serve as valuable advocates, educating the larger community by sharing newly-acquired knowledge about public assistance. The Newport News Department of Social Services firmly asserts that the positive results of volunteer involvement in financial services are well worth the investment of time and energy.

Chapter II

PROGRAM IMPLEMENTATION

A. Initial Planning

Administrative Commitment

Perhaps the most critical of all issues influencing a volunteer program is the degree of support from the agency's top management. In the case of Newport News Social Services, the administration is solidly behind the volunteer program. The commitment to staff training for working with volunteers, to the concepts of good personnel management for volunteers, to attending volunteer activities, to assisting with training, and to the conviction that volunteers should play essential roles in the agency--all are proof of top management belief in the program.

Further evidence of support is the degree of financial investment in the program. While it is not a separate line item, the volunteer program is included in the agency's overall administrative budget. The budget funds a full-time volunteer coordinator, training resources, supplies, funds for recognition events, etc. Volunteers are accorded the same office space and equipment as the paid staff. They have desks, telephones, and supplies. Volunteers may use agency vehicles, provided they take a defensive driving course--a requirement for paid staff as well. (Reimbursement is not available for mileage to and from the agency, or for meals while volunteering.) The cost of providing these basic items is not insignificant, but the agency is convinced that the value of services the volunteers provide far exceeds the funds allotted.

Job Descriptions

Actual planning for the Financial Services Volunteer Project began when several eligibility workers contacted the agency's volunteer coordinator with a request for volunteers to assist them in their work. The volunteer coordinator responded by approaching the unit supervisors in Financial Services and the agency's management group with the concept of a volunteer program for eligibility workers. The management group was very supportive, and the unit supervisors began to identify possible volunteer jobs ranging from intake and client orientation to recordkeeping and other support services.

The potential jobs were then discussed with the staff of each unit for comments on the appropriateness and the scope of the responsibilities. Suggestions made at these meetings were incorporated into job descriptions written by the unit supervisors and the volunteer coordinator. These job descriptions were then reviewed again with the unit workers for clarification. (See Appendix for examples of job descriptions.)

This process of developing job descriptions served as a type of needs assessment as well. It verified the need for volunteer assistance, and assured that everyone's needs were met. In addition, input obtained from the line workers, their supervisors and top administration assured a stable foundation of agency-wide cooperation from the outset. No one was excluded from contributing to the program's growth.

Supervisory Roles

Evolving out of the development of job descriptions was the identification of volunteer supervisors--those individuals who would directly supervise volunteers on the job. The eligibility workers were invited to take on this added responsibility, and while a few were appointed to the position, most volunteered. The individuals also reviewed the proposed job descriptions in order to ensure clarity and appropriateness.

In addition to several volunteer supervisors, two members of the eligibility unit serve as coordinators. Working closely with the volunteers, their supervisors, and the agency volunteer coordinator, they are responsible for keeping the agency volunteer coordinator up-to-date on needs, problems, and successes of the volunteer eligibility workers. Again, both eligibility coordinators volunteered for the assignment.

Staff Support

A crucial element in volunteer program planning is developing staff interest and support. Initially, all staff members in Newport News participated in a volunteer supervision workshop. This session was designed to orient staff to working with volunteers, agency policies regarding volunteers, and supervision techniques. Workers were also encouraged to develop a profile of their own duties and responsibilities and then target those which they felt comfortable delegating to volunteers.

A frequent concern of staff is the protection of client confidentiality. Volunteers are asked to sign a contract that spells out the parameters of confidentiality and the consequences of violating it. If a worker is still uncomfortable

with volunteers being exposed to confidential material, the volunteer coordinator or unit supervisor explains to the worker that it is not pay status but respect for the right to privacy that motivates workers to honor client confidentiality. When seen in this light, staff accept the volunteers' ability to keep client information confidential.

Significant involvement of the volunteer coordinator in new worker orientation is another method for promoting staff support of the volunteer program. Orientation to the volunteer program helps new staff to understand the philosophy and policy that guide the program and emphasizes that volunteers are an important and vital part of the agency's approach to helping clients. The new worker orientation has helped to alleviate the anxieties of many staff members prior to beginning an involvement in the volunteer project.

Finally, the prevailing overall attitude that volunteers are to be regarded as unpaid staff seems to head off staff resistance. The agency's philosophy is that the "only difference between a paid and volunteer staff member is the paycheck." Understanding this, paid staff accept volunteers as members of the agency--no more, no less--with concomitant rights and responsibilities.

B. Volunteer Staffing

Recruitment

Responsibility for determining the actual number of volunteers needed rests with the eligibility coordinators. They, in turn, notify the agency volunteer coordinator of the units' needs. Recruitment is done, in part, by the local Voluntary Action Center through newspaper articles and referrals of potential volunteers. And of course current volunteers are always recruiting friends and family. The other major recruitment effort is done by agency workers who recruit clients as volunteers.

By inviting clients to become volunteers, the benefits of the program have been significantly expanded. The agency benefits from the volunteer service rendered; the clients who volunteer benefit from the work experience, increased self-esteem, and the socialization that takes place within the agency; and the clients receiving service benefit from the simple fact that the volunteer program exists. Newport News has found this arrangement to be a uniquely valuable feature of the Financial Services Volunteer Project.

Screening

The screening of volunteers takes place in several phases. The first phase is a telephone interview. This enables both agency and volunteer to determine immediately if there is a possibility of a match. If not, the potential volunteer is referred to other agencies or the Voluntary Action Center. If both wish to go further, the volunteer coordinator mails an application form and sets up a screening interview. The potential volunteers are asked to bring the completed application with them when they come for the interview.

This interview is extensive so that both parties can assess whether the possible placement is appropriate. The potential volunteer is given information concerning the job, the agency's goals and objectives, staff expectations, and any other necessary information and is encouraged to voice questions, concerns, and interests which will help in making the ultimate decision of whether to volunteer. The volunteer coordinator asks the applicant to detail past experience and skills as well as what he or she hopes to gain from volunteering.

If both the volunteer coordinator and the potential volunteer are interested in pursuing a placement, the eligibility coordinator is contacted. This leads to a hiring interview in which both the eligibility coordinator and the volunteer supervisor interview the candidate. The session is conducted just as it would be for a salaried position. In this way, candidates are placed in volunteer jobs for which they are qualified and from which they can gain experience that is often used to help them re-enter the job market or further their careers. Potential volunteers that meet the approval of unit personnel during this second interview are given assignments. Those individuals not invited to a second interview are referred to other agencies.

Volunteers who are placed in the Financial Services Project make a verbal contract for three months of service. After completion of the commitment, continuation is negotiated.

Orientation and Training

The next step is to ensure that the volunteer staff members are oriented to the agency and trained in the specifics of their jobs. All volunteers in the Newport News Department of Social Services go through an eight-hour new worker orientation. This is the same orientation that paid staff undergo, and in most cases the volunteer and paid staff members go through it together.

For the most part, volunteers in the Financial Services Project are given on-the-job training, since formal eligibility training is offered only every six months. Other training opportunities are available for those volunteer staff members striving to be promoted within the volunteer system.

C. Supervision

Once the volunteer is placed, the responsibility for work assignments, supervision, and evaluation falls to the line eligibility worker to whom the volunteer reports. Day-to-day supervision of volunteer staff is conducted in the same manner as for paid staff.

Volunteer Evaluation

One of the supervisory functions of the line worker is the preparation of a performance evaluation on each volunteer he/she supervises. These are formal, and are used to determine continued placement, new assignments, training needs, promotion, and termination. Evaluations are conducted at intervals of three months, six months, and a year for new volunteers. After one year of service, a volunteer is evaluated annually. Volunteers also receive an evaluation at the time of termination, regardless of the cause for termination.

Volunteers in the Financial Services Project can opt for a promotion system if they wish. The three steps in the promotion ladder are: eligibility aide, eligibility trainer, and eligibility supervisor. Promotion requires both training and experience, and each level entails added responsibility. (These are detailed in the appended job descriptions.)

In the event that the supervisor senses that a placement is not working out or is inappropriate, the performance evaluation helps the supervisor and volunteer decide whether the placement should continue. If they decide that the volunteer is not in the right position, but perhaps would do well somewhere else in the agency, the agency volunteer coordinator looks into other possibilities.

If the supervisor is considering terminating a volunteer, the same steps are followed as with a paid staff member. The volunteer is counseled and specific expectations for improvement of performance are outlined. Proper documentation must be kept throughout this process. Exit interviews are always conducted, either by phone or in person, by the agency volunteer coordinator.

Recognition

Recognition of both volunteer and paid staff members in the project is very important. The agency recognizes all volunteers annually, but this is only a small part of the total recognition effort. Notes on birthdays and anniversary dates let the volunteers know they are remembered as an important part of the agency team. Supervisors are reminded of birthdays, and many units have a special luncheon or some other type of celebration. Individual units recognize their volunteer staff during National Volunteer Week. In addition, a volunteer newsletter focuses on the accomplishments of volunteers as individuals, groups, and by units. All of these activities are vital to the process of creating an atmosphere where volunteers know they are making an important contribution, and where they feel appreciated.

Paid staff are also recognized for their efforts in making the project successful. Acknowledgement of their work with volunteers is made at agency meetings. The paid staff in the project receive a departmental volunteer pin and thank-you notes during National Volunteer Week.

D. Program Control

Controlling is a management function that enables the volunteer coordinator to document and evaluate the program for which he/she is responsible. This is one area that Newport News has continued to improve upon as the program itself has grown.

Recordkeeping

In the Newport News Financial Services Project, the agency's volunteer coordinator maintains a personnel file on each volunteer. It contains the application form, a confidentiality contract, evaluations, and other pertinent information regarding the volunteer. These files provide a complete history of everyone who volunteers with the agency.

In addition to the individual personnel files, the agency volunteer coordinator maintains a master log of volunteers according to program area. The master log is a running record of all volunteers in a particular area of service--in this case, the Financial Services Project. A generic master log for the entire agency is also kept in the coordinator's office.

A scrapbook on the volunteer program is a supplemental method of recordkeeping used in Newport News. The book contains pictures with the volunteers' names, number of people involved in each project, number of hours worked, and other important details. The scrapbook is made available for everyone to look at during the agency's annual recognition ceremony.

Program Evaluation

The Financial Services Project is evaluated continually on an informal basis and periodically on a formal one. Evaluation involves reassessment of the program itself and of the needs of persons who participate in the program.

Since the project's inception the volunteer jobs have been redefined as the various tasks and volunteer roles were clarified. The volunteer coordinator and eligibility supervisor worked together to redesign the job descriptions to ensure that they were accurate and functional.

The screening process required some refinement as well when it became evident that some volunteers were motivated to take eligibility jobs because they wanted to help clients on a one-to-one basis. Once in the job these volunteers realized that eligibility determination does not involve extensive social work practice; rather it is more administrative and clerical in nature. This confusion resulted in disappointed volunteers and a high attrition rate. Now, however, the screening process emphasizes the clerical rather than case-work aspects of this work, resulting in more appropriate assignment of volunteers and a higher retention rate.

On an informal basis, the volunteer coordinator assesses the program by maintaining close contact with everyone involved. For example, the coordinator actually walks through the entire agency at least once a week, speaking with each volunteer. She is visible and available to fellow staff to hear their concerns and suggestions. She assumes nothing and continually asks about and responds to what is being expressed.

The key to good evaluation, then, is in recognizing that people and projects are dynamic, not static. Volunteer managers must remain flexible enough to react to new needs in order to keep programs viable and effective.

SUMMARY

By all indications, the Financial Services Project has been a success thus far. Several very positive results are observable which make it not only a programmatic success, but also a success for the individuals involved.

The volunteer staff themselves have benefited from providing help to others. One individual was actually hired as an eligibility worker by the agency, while others have used their volunteer experience in obtaining paying jobs elsewhere.

Paid staff members have enjoyed the creativity and professional development that the program has afforded them. The volunteer project has given the eligibility workers opportunities for growth in the areas of program development, supervision, and job design. The success here is evidenced by the requests to the agency's volunteer coordinator for more volunteers--not just for each unit, but for each individual eligibility worker.

In addition, paid staff are excited about the fact that clients are being better served and that each worker is able to do more than just the minimum requirement for the clients. The program has also helped to better educate the clients and the community at large to the services provided by the Department of Social Services in Newport News.

In short, the careful planning and cooperation that have characterized this volunteer project from the beginning have proven that those who dare to try something new often achieve great results!

APPENDIX:

- Job Descriptions
- Performance Evaluation Form
- Program Evaluation Form



CITY OF NEWPORT NEWS

VIRGINIA

DEPARTMENT OF SOCIAL SERVICES
OFFICE OF THE DIRECTOR

2410 WICKHAM AVENUE
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VOLUNTEER JOB DESCRIPTION

AGENCY Newport News Department of Social Services - Financial Services Bureau

POSITION TITLE Financial Services Aide - Receptionist/Telephone Operator

JOB SUPERVISOR Case Management (E.W./Supervisor) Intake (Sr. E.W./Supervisor)

SKILLS NEEDED Must have the ability to read and write; to work independently; understand verbal and written instructions; to deal with all types of people and various situations; to file alphabetically and numerically; to interact and get along with others. Must be dependable, reliable, punctual and capable of maintaining client confidentiality. Position may require the ability to comprehend detailed instructions and implement tasks to completion. Ability to relay information to groups of clients, assist with client interviews and provide instructions.

TRAINING/ORIENTATION Agency Orientation (8 hrs.), On the Job task overviews and training (4 hrs. - ongoing) and Specific program orientation overview (Aid to Dependent Children, Food Stamps and Medicaid) (6 hrs.).

SPECIFIC TASKS/ASSIGNMENTS Compile recertification packages, arrange client appointments, assist with ADC Monthly Reporting tasks, update policy manuals, assist with group intake/recertification, file documents in proper case record order, utilize zerox for duplication of forms/documents, provide telephone backup for workers/units, direct calls, screen clients for appropriate worker and services, provide information related to assistance programs, inquire case/client information from CARES/VACIS computer systems, present program information to groups of clients, assist with numerous bureau projects incorporating many of the above skills.

TIME COMMITMENT

*HOURS NEEDED 9:00am - 4:00pm - Flexible DAYS NEEDED Flexible

LENGTH OF COMMITMENT NEEDED 3 months

MINIMUM AGE 18 y.o. MAXIMUM AGE 70 y.o.

COMMENTS Financial Services Aide will not carry a caseload or be allowed to determine eligibility in any of the financial services programs. The specific tasks/assignments will be dependent on the unit assignment and the need at the specific time. Some volunteers may have the opportunity to learn and apply most of the described tasks, others may be limited in the tasks they have the opportunity to learn and apply. The benefits of the job for a volunteer will include the opportunity to work in a public welfare agency and gain experience in working with the clients, eligibility workers and learn the various requirements of the Financial Services programs and the related support systems. Volunteer experience in Financial Services can be an asset toward securing employment; however, will not in and of itself prove useful toward a position in a public welfare agency.

*Hours required and number of days per week based on current needs. Work schedules can be changed to meet unit needs and requirements. Change in schedules may also be periodically requested due to special projects.



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DIVISION OF SOCIAL SERVICES

S E CULPEPPER
DIRECTOR
JERRY PARRISH
ADMINISTRATOR

VOLUNTEER JOB DESCRIPTION

AGENCY NEWPORT NEWS DEPARTMENT OF SOCIAL SERVICES

POSITION TITLE Financial Services Aide Trainer

JOB SUPERVISOR Financial Services Volunteer Program Coordinators

SKILLS NEEDED Ability to organize material and instruct in a easily understood manner, to address questions with factual answers, to plan and organize groups of trainees, schedule and organize training. Qualities in leadership, public speaking, time management and organizational ability. Understanding of Financial Services and the program areas.

TRAINING/ORIENTATION In addition to training received as Financial Services Aide; Training for Trainers and 2 optional training sessions prior to promotion.

SPECIFIC TASKS/DUTIES Provide specific task training, assist with program overview training, maintain volunteer training records. Coordinate and organize training schedules, secure training sites and identify volunteer training needs.

TIME COMMITMENT:

HOURS NEEDED as identified PER DAY PER WEEK PER MONTH (Please circle one)

DAYS NEEDED as identified

LENGTH OF COMMITMENT NEEDED ongoing

OTHER PREFERENCES: N/A see below in comments.

SEX _____

RACE _____

MINIMUM AGE _____

MAXIMUM AGE _____

COMMENTS: This is a position for a volunteer who has served as a volunteer aide for a period of time and performance and ability indicate the skills and abilities present to perform in this position. Promotion will be recommended by the volunteers supervisor and reviewed by the bureau coordinators and Volunteer Coordinator.



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DIVISION OF SOCIAL SERVICES

SE CULPEPPER
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JERRY PARRISH
ADMINISTRATOR

VOLUNTEER JOB DESCRIPTION

AGENCY NEWPORT NEWS DEPARTMENT OF SOCIAL SERVICES

POSITION TITLE Financial Services Aide Supervisor

JOB SUPERVISOR Financial Services Volunteer Program Coordinator

SKILLS NEEDED Ability to maintain accurate documentation records and files, to provide leadership and support of supervisees, to provide training in specific task assignments and demonstrate sound logic judgement in personnel decisions.

TRAINING/ORIENTATION Introduction to Supervision, volunteer supervision training, Training for Trainers, and complete 2 optional training sessions prior to promotion.

SPECIFIC TASKS/DUTIES Maintain financial services aides' time sheets, assign tasks, observe performance through regular contact with aides, recommend promotions, complete performance evaluations, provide task training, monitor completion of projects, maintain personnel records, provide support to aides (ie: constructive criticism, conferences, etc.)

TIME COMMITMENT: To be determined at time of promotion.

HOURS NEEDED _____ PER DAY PER WEEK PER MONTH (Please circle one)
DAYS NEEDED _____
LENGTH OF COMMITMENT NEEDED ongoing

OTHER PREFERENCES: N/A see below in comments.

SEX _____ RACE _____

MINIMUM AGE _____ MAXIMUM AGE _____

COMMENTS: This position is for a volunteer who has served in the position of Volunteer Aide for a period of time and performance and ability indicates skills and abilities present to perform in this position. Promotion will be recommended by the volunteers' supervisor and reviewed by the bureau coordinators and Volunteer Coordinator.

PERFORMANCE EVALUATION

Date _____

Volunteer Evaluated _____
(Name)

Evaluated by _____ Position _____

Job Assignment(s) _____

No. of Hours Given _____ Dates: From _____ To _____

Please respond to the following questions.

1. Evaluate the volunteer's performance (outstanding, very good, average, unsatisfactory, or not applicable) in the following areas:

a. Quality of work

- 1. Thoroughness in fulfilling duties _____
- 2. Completion of assigned tasks within reasonable amount of time _____
- 3. Demonstration of competence in performance of duties _____
- 4. Implementation of training materials _____
- 5. Ability to identify, refer, and/or solve problems on the job _____ Please give examples _____

b. Attitude toward job

- 1. Flexibility _____ Comments or examples _____
- 2. Dependability _____
- 3. Attendance of training sessions/unit meetings _____
- 4. Promptness _____
- 5. Reliability _____

c. Relationship with others

- 1. Communication with staff _____
- 2. Client rapport _____
- 3. Ability to develop communication with appropriate resources _____
- 4. Ability to follow chain of command _____

2. Did the volunteer demonstrate other significant qualities such as:
- a. Leadership _____yes _____no If yes, please explain_____
 - b. Assumes additional responsibilities
_____never _____occasionally _____frequently

3. Do you have any suggestions for further placements of this volunteer? If so, what?

4. Attach any commendations, complaints, or other comments reflecting the volunteer's work in current position.

Volunteer's signature

Date

NEWPORT NEWS DEPARTMENT OF SOCIAL SERVICES

PROGRAM EVALUATION

Date _____

Name of Agency _____

Job Assignment(s) _____

No. of hours given _____ Dates: From _____ To _____

Please respond to the following questions. Your input will help to make the volunteer program more responsive to your needs, staff needs, and client needs.

1. Supervision

- a. Were your job duties explained to you by the supervisor before you started work? _____ yes _____ no
- b. Did your job include duties not described until you started work? _____ yes _____ no If so, what were they? _____
- c. When you needed information was your supervisor available?
_____ always _____ usually _____ sometimes
_____ frequently unavailable _____ never
- d. When you needed assistance was your supervisor available?
_____ always _____ usually _____ sometimes
_____ frequently unavailable _____ never
- e. Did your supervisor make arrangements or provide needed equipment (desk, phone, office supplies)?
_____ yes _____ no If no, what did you need? _____
- f. Were you informed of and included in unit meetings, agency meetings, and in-service trainings? _____ yes _____ no
If not, what did you miss? _____

2. Training

- a. What type of training have you received since you started working here? _____
- b. Have you been able to use the training material?
_____ very little _____ some _____ quite a bit
_____ almost all How have you used the information? _____
- c. Were the instructors able to teach you what you wanted to know? _____ yes _____ no
- d. Was there a chance to ask questions during the training sessions? _____ yes _____ no
- e. Do you have any comments or suggestions for improving training for this position? _____

f. Is there any other type of training you would like to receive? yes no If yes, please identify?

3. Volunteer job

a. Did you find your job challenging and meaningful?

yes no Comments _____

b. Do you want to continue in this position?

yes no If not, what would you like to do?

c. Did you find your co-workers supportive?

yes no Please explain _____

d. Did the staff seem appreciative of your work?

yes no not applicable

e. Did the clients you worked with seem appreciative of your work? yes no not applicable

f. Were you able to see progress with the clients?

most of the time frequently seldom

never not applicable

4. Do you have any comments or suggestions for improving . . . supervision? _____

recognition of volunteers? _____

recognition of staff? _____

job orientation? _____

client services? _____

client follow-up? _____

the overall volunteer program? _____

Volunteer signature _____

Date _____

NEWPORT NEWS DEPARTMENT OF SOCIAL SERVICES