# THE JOURNAL OF VOLUNTEER ADMINISTRATION

**Fall 1989**



**VIII: 1**

# ASSOCIATION FOR VOLUNTEER ADMINISTRATION

**The Association for Volunteer Administration (AVA) is the professional association for those working in the field of volunteer management who want to shape the future of volunteerism, develop their professional skills, and further their careers. Members include volunteer program administrators in a wide variety of settings, agency executives, association officers, educators, researchers, consultants, students—anyone who shares a commitment to the effective utilization of volunteers. AVA is open to both salaried and nonsalaried professionals.**

**AVA also has a special membership category that enables organizations with mutually-compatible goals to AVA to become Affiliate Members. Affiliates range from local associations of directors of volunteers, to statewide volunteerism groups, to national organizations. Affiliates, each with its own membership base, broaden the networking possibilities open to all AVA members.**

**AVA is an association run by its members. Active committees include: Public information; Professional Development; Resource Development; and Public Policy. Members also plan the annual "International Conference on Volunteer Administration," a major event held each year in a different city in the United States or Canada. This Conference provides participants the opportunity to share common concerns and to focus on issues of importance to volunteerism.**

**AVA is divided into twelve geographic regions, each of which develops a variety of programs to serve its members. These can include annual regional conferences, periodic local workshops, newsletters, and informal "cluster group" meetings.**

**Two major services that AVA performs, both for its members and for the field at large, are Certification and Educational Endorsement. Through the Certification process, which recognizes leaders of volunteer programs who demonstrate professional performance standards, AVA furthers respect for and appreciation of the profession of volunteer administration. Similarly, AVA Educational Endorsement is given to those workshops, courses, conferences and training events that provide opportunities for professional growth in volunteerism.**

**Finally, AVA produces publications, including several informational newsletters and booklets, and THE JOURNAL OF VOLUNTEER ADMINISTRATION.**

**For further information about the ASSOCIATION FOR VOLUNTEER ADMINISTRATION, contact AVA, P.O. Box 4584, Boulder, CO 80306.**

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# Fall 1989

With this issue of *The Journal of Volunteer Administration*, the Association for Volunteer Administration initiates what we hope is the first of many special issues of value to our readers, one with a theme and "guest edited" by an expert in the field. Because of its timeliness and importance, the article about the VOLUNTEER 2000 STUDY was also included in this issue.

Most of the articles which you will read here were submitted as a result of a special "Call for Manuscripts" released a year ago. There was nothing pushing us to select the topic of program planning and evaluation except that there was a qualified volunteer willing to take on the challenge of helping to develop the system of "guest editing," and the topic was one that is important to volunteer and paid staff, regardless of the setting.

Hopefully, this will interest some of our readers in taking on the challenge in an area of interest to them. We have no deadline or topic for the next special issue, so let us know if you would like to consider this opportunity for your own professional development.

Please write us to comment on this innovative undertaking. Who knows—you might even be published in *The Journal of Volunteer Administration*!

Enjoy!

Anne S. Honer
Editor-in-Chief

# Introduction

The percentage of volunteers dwindled slowly over the last 5 years. The number of hours available for leisure time for adults has dropped 10 hours since 1973. Volunteer programs throughout Canada and U.S. cry out for more volunteers. What is happening to volunteerism?

Solutions lie in many directions: more sophisticated management of current programs, marketing strategies for recruiting, the widespread use of volunteer recruiting teams, more emphasis on development of episodic volunteering, and deeper understanding of the reasons people volunteer. One primary solution is to improve the programs offered to volunteers.

Frederick Herzberg, an industrial psychologist, maintains that the job must be interesting before you can have a truly motivated work force. Ask yourself: When were the jobs in our organizations designed? Who was involved in developing the way we deliver the service? Are we trying to interest 90's volunteers in 50's jobs?

This issue of *The Journal of Volunteer Administration* offers practical tips on the development of new programs and strategies used to evaluate both volunteers and programs. You can learn about hospital volunteers in emergency rooms and understand their effectiveness. Evaluation of a wide range of programs at the Haas Public Service Center at Stanford University serves as a model for those using evaluation techniques to improve their programs. Another article describes a new program to train those who supervise volunteers. The slow implementation of a volunteer evaluation is described in an article by Nancy Gaston. A new method of assessing value, the naturalistic method, is applied in the volunteer sector. Another paper deals with a highly participatory model for planning programs.

The thoughtful work of these authors can only add to the overall understanding of solid program planning and evaluation. Futurists predict the loss of 3000 volunteer organizations and agencies by the 21st century. The strategies suggested in this special issue of TJOVA are aimed at helping you stay out of the group of 3000.

Nancy Macduff
Guest Editor
Walla Walla, WA
Fall, 1989

# About the Guest Editor

**Nancy Macduff** has worked in the field of volunteerism for 21 years. For 14 years she served as the Executive Director of a not-for-profit youth-serving agency. From 1983–87 she served as Community Resource Program Manager for a governmental volunteer program. In both those jobs she was known for innovation and creativity in developing programs. One program received an honorable mention citation from President Reagan during National Volunteer Week ceremonies. Currently she is on the faculty at Washington State University, Pullman, WA, teaching classes on the management of volunteer programs to graduate students. She is a prolific author of books, articles, and research findings. Her most current publication is *Designing Programs for the Volunteer Sector*. She is a member of the Association for Volunteer Administration (AVA) Region 10 Council, serving as Chairperson of Professional Development; she is also a member of the Board of Directors of the Association of Voluntary Action Scholars.

# Taking Volunteerism into the 21st Century: Some Conclusions from the American Red Cross VOLUNTEER 2000 STUDY

**Maria P. Smith**

INTRODUCTION

In essence, volunteerism is a state of mind. It urges us to help resolve problems beyond the parameters of our daily lives. It propels us to act when we perceive a need. And it reminds us that, although our actions as volunteers are not always selfless, there is great reward in the accomplishment of a worthwhile task.

The fielding of a strong volunteer force is a natural concern for the American Red Cross, which by virtue of its size, local, national, and international presence, and the great variety of its services is a microcosm of philanthropic activity in the United States. For the first decades of its existence the American Red Cross was directed and staffed exclusively by volunteers. Paid staff were hired only when needed to do work for which volunteers could not be found.

Today the ratio of volunteers to paid staff at the American Red Cross is still 50 to 1. Volunteers are viewed as central to the organization and not as mere extensions of paid staff. The 1,200,000 volunteers who work with 23,000 paid staff throughout the nearly 2,800 chapters of the Red Cross are involved in every aspect of the organization—from hands-on service and middle management to the highest echelons of leadership. Their invaluable contribution to the organization is based on their experience, skills, dedication, clout, passion, and capacity to reach out to the American public.

As the world changes, the responsibilities, expectations, and identities of volunteers also change. For this reason, the American Red Cross initiated a study of current issues in volunteerism and volunteer administration. The results of that exhaustive investigation are documented in the Red Cross 1988 three-volume VOLUNTEER 2000 STUDY. This article summarizes some of the broad conclusions of that study.

THE BASIC ELEMENTS OF SUCCESSFUL VOLUNTEER INVOLVEMENT

The VOLUNTEER 2000 STUDY concluded that in the environment we can predict for the next decades the following principles will need to underlie any successful volunteer program:

1. Defining who is a volunteer in an ethical yet inclusive manner.
2. Removing barriers to volunteering so as to broaden the potential volunteer pool.
3. Recognizing that volunteers are not "free."
4. Appreciating that volunteers contribute more than the sum of their labors.
5. Moving away from the concept of the volunteer as an amateur.
6. Assuring that the *mutual* expectations of volunteers and their organizations are met.
7. Developing, not "using," volunteers.
8. Involving volunteers in management.
9. Looking beyond volunteer numbers.
10. Looking to collaboration among nonprofit organizations as a means to maximize volunteer opportunities and effectiveness.

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### *An Ethical and Inclusive Volunteer Definition*

> *Volunteers are individuals who reach out beyond the confines of their paid employment and their normal responsibilities to contribute time and service to a not-for-profit cause in the belief that their activity is beneficial to others as well as satisfying to themselves.*
>
> VOLUNTEER 2000 STUDY

That new definition of volunteers presented in the study includes the basic elements of what traditionally was agreed to constitute volunteerism:

- service to something beyond oneself;
- a contribution of time or effort outside a formal for-pay relationship;
- a contribution of time and effort beyond normal personal responsibilities.

However, the new definition also broadens the traditional concept in significant ways:

- In acknowledging that volunteers themselves benefit in many ways from their volunteer participation, it avoids passing judgment on the motivations of volunteers or on degrees, if any, of coercion.
- The definition *includes* employees in both the private and public sectors who volunteer on company, government, or "work release" time, providing that the service rendered is not part of their regular job.
- The definition *excludes* those who work without pay for a nonprofit organization while being paid for that service by a third party. Thus it excludes, among others, formal contract relationships such as the "loaned executive" and the "pro bono" law services of a firm. These are considered to be "donations in kind" by firms rather than volunteerism by individuals.
- Its phrasing on rewards does not rule out various volunteer "enabling" and motivating initiatives such as training, stipends, vouchers for eventual benefits, or expense reimbursement meant to help broaden the volunteer pool.

The new definition of volunteers as set out in the VOLUNTEER 2000 STUDY takes into account the complexities of today's volunteer world and our rapidly changing society. It is intended to be nonjudgmental, flexible, and inclusive without losing sight of the essential elements of volunteerism.

### *Removing the Barriers to Volunteering so as to Broaden the Volunteer Pool*

While many speak today of a "shrinking volunteer pool," that pool has actually been growing. Working women, who a few years ago were expected to drop out of the volunteer force, are now shown to be volunteering at a greater rate than nonworking women (though, individually, they donate fewer hours than nonworking women). Students in schools and colleges have shown renewed interest in volunteering. Retiree organizations have promoted volunteerism among seniors through talent banks and information networks. Increased interest in religion has resulted in volunteer growth in programs sponsored by religious groups. Corporations are strongly encouraging volunteer activity by their employees. Government at all levels and in both the legislative and executive branches has stimulated interest in, and respect for, volunteer work.

What unfortunately has not yet happened to a significant degree, however, has been an increase in participation by those populations that traditionally have not formally volunteered. Still largely absent from the volunteer force are such potentially large volunteer resources as ethnic and racial minorities, low-income families, the disabled, and those homebound or without transportation.

Before these groups can be expected to participate fully in volunteer activities, barriers to volunteering must come down. Such barriers include:

- *Language barriers*: The words associated with volunteerism sometimes do not exist or have different connotations in other languages. In addition, volunteer recruitment is too rarely conducted in foreign languages.
- *Cultural barriers*: Certain aspects of the volunteer world (for example, highly

structured committees, work outside the local community, intrusion into other people's private lives), are alien to some cultures.

- *Economic barriers*: While many persons from low income households gladly work without remuneration for causes they believe in, they often cannot afford such incurred expenses as transportation, telephone charges, child or elder care, training or uniforms.
- *Physical barriers*: Too many work areas still do not provide access to the handicapped; too much communication still does not reach the seeing and hearing disabled.
- *Barriers of time*: Too many volunteer opportunities are still limited to normal working hours.
- *Barriers to togetherness*: Too few opportunities exist for couples or entire families to volunteer together.
- *Barriers of distance*: Despite strides in communication that permit a decentralized workplace, too many programs still require volunteer presence at central locations, thereby excluding the homebound or those without transportation.

With a little effort and creativity these barriers and others can be removed to access a broadened volunteer pool. One of the most exciting success stories in this regard at the American Red Cross involves homebound volunteers who have become "command centers" for disaster relief operations. Their continued presence near their telephones has turned their handicaps into personal and community assets, improving 24-hour coverage and emergency communication, while placing the homebound functionally, if not physically, in the midst of their communities.

*Recognizing That Volunteers Are Not Free*

Volunteers bring to the organizations they serve many tangible and intangible benefits. They also bring with them costs which the organizations must recognize and be willing to bear if they are to maintain a strong and well-qualified volunteer force. The idea that volunteers provide "free services" is a misconception.

1. Costs similar to paid staff
   - Volunteer involvement generates administrative costs such as those associated with recruitment, placement, orientation, training, supervision, and record-keeping. These are similar to costs for paid personnel administration with the exception, of course, of those very time- and staff-consuming functions related to paid staff salaries, pensions, and benefits.
   - As with paid staff, volunteers need logistical support such as work space, supplies, information, telephones, computer terminals, travel allowances, secretarial or other staff assistance, identification, and other job necessities.
   - To promote retention, an organization needs to invest in the professional and personal development of its volunteers. Just as with paid staff, this involves the enhancement of both technical and interpersonal skills and growth opportunities beyond immediate job requirements.
   - Recognition—acknowledging a person's contributions to an organization—needs to be accorded to both paid and volunteer staff and involves costs of time and money.
   - Volunteer committees and boards, just like committees and boards composed of paid members, need to be staffed. Regardless of whether that staffing is done by paid employees or volunteers, it costs time and money.

2. Costs Particularly Associated with Volunteer Involvement

There are two costs that need to be borne by all volunteer-involving organizations. One is the cost of intensive and effective training for all managers in the skills of volunteer administration. The second is the cost of an effective orientation of all personnel to the nature of the volunteer culture prevailing in the organization. Such training and orientation need to be mandatory regardless of whether the organization is all-volunteer or includes both paid and volunteer staff.

For those organizations that involve both paid and volunteer staff, there are additional costs associated with acquainting both classifications at all levels of the organization with the structures, skills, and sensitivities necessary for working with each other in a full and tension-free partnership.

The costs of honing volunteer management skills and of increasing sensitivities of paid and volunteer staff in regard to each other are small by comparison to the intangible costs incurred when those skills and sensitivities are absent.

3. Avoidable Costs

Some negative perceptions about volunteers are occasionally held by volunteers and paid staff alike. Whenever these perceptions reflect reality or whenever misperceptions remain uncorrected, they signal intangible costs such as inefficiency or workplace tensions. Some of these perceptions include the following:

- Volunteers are not always available when needed because of irregular schedules or other commitments.
- Volunteers sometimes tend to be less responsive to such organizational restraints as chain of command, budget limitations, timelines, and deadlines.
- Volunteers cannot be disciplined or held accountable.
- Volunteers sometimes act in a "cavalier" manner because they do not have any "real stake" in the outcome.
- Action is sometimes delayed when volunteer approval is required as volunteer boards and committees meet too infrequently.
- Volunteers receive preferred treatment (such as the most interesting jobs) and are accorded greater visibility than paid staff.
- Volunteers are in position to compete unfairly for paid jobs that open up.

All of the above problems are avoidable. Appropriate training and orientation of both paid staff and volunteers (including board members); an accepted performance management system for both paid staff and volunteers; improved planning, scheduling, and articulation of mutual expectations can resolve these problems when they arise. In addition, it should be noted that many of these perceptions apply to poorly managed paid staff as much as they do to poorly managed volunteers.

*Appreciating the Full Extent of the Volunteer Contribution*

The costs of volunteer involvement are shouldered willingly by organizations that fully appreciate the volunteer contribution, a contribution which goes far beyond the accomplishment of specific job-related duties. Within Red Cross there is a strong awareness of the true worth of volunteers as evidenced by the following often repeated comments:

- "Without volunteers there would be no programs"; "They are the hands and the numbers"; "A significant reduction in our volunteer force and we close shop"; "Volunteers extend our reach and our capacity to deliver services."
- Because they personify "service" and "humanitarianism," volunteers provide the "image," the "legitimacy," and the "credibility" that enable the Red Cross to ask for contributions of blood and money.
- Volunteers provide "priceless diversity" and "depth" of skills, talents, expertise, and experience; in addition they often bring an "external perspective," "corporate discipline," and the capacity for "reality testing" to the nonprofit world.
- Volunteers give an organization community access. They identify and make available community resources; they open doors to particular segments of the community; they are particularly well received fund raisers. They can provide a high profile for the organization and its programs.
- Volunteers often bring an element of "passion" and "enthusiasm" to the workplace.
- Volunteers often serve as "innovators" and "risk takers."
- As bearers of bad news and in the resolution of problems, volunteers sometimes are "better received" than paid staff.
- During times of paid staff turnover, volunteers provide continuity and memory.

These many and diverse contributions by volunteers in addition to the performance of their assignments give an organization a tremendous return on its investment in a volunteer force.

### *Not Viewing the Volunteer as an Amateur*

Management expert Peter Drucker recently observed that volunteers "are increasingly selected, trained, supported, and managed as unpaid staff, rather than as well-meaning amateurs" ("The Nonprofit's Quiet Revolution," *Wall Street Journal*, Sept. 8, 1988). He credits this development to a new emphasis on sound management practices by nonprofit agencies, and a shifting emphasis from reliance on "the good cause" to accountability and results.

There are other reasons for this development as well. One of these is that volunteers simply often *are not* amateurs, because they volunteer in their areas of expertise. Skillful recruitment and job matching will have as a result that volunteers provide the organization with the benefits of lifetimes of professional experience, developed talents and skills, and willingness not only to use these on behalf of the organization but to share them through instruction of paid staff and other volunteers.

When volunteers do undertake unfamiliar tasks, sound administrative practice dictates that the organization provide them instantly with systematic orientation, training, supervision, on-the-job experience, and evaluation. Where skill development takes time, apprenticeship stages need to be defined. Once a volunteer is ready to perform at a competent level, he or she is, and must be considered to be, as professional as any paid employee with the same experience. Thus, the use of the adjective "professional" should never be used to exclude volunteers, as in the unfortunate expression "volunteers and professional staff." Whether a person is being paid or not should never be the criterion for determining professionalism.

Emphasis on training and competence is necessary to the self-esteem and self-confidence of the volunteer as well as to the safety and satisfaction of clients. It also helps ensure the degree of confidence in our nonprofit programs and institutions our society needs to have if it is to continue to support them with donations of time and money.

### *Meeting the* MUTUAL *Expectations of Volunteers and Their Organizations*

In recent years, the management of volunteers has come to be recognized as a specialty within the broader area of personnel administration. Increasingly, organizations recognize that the recruitment, development and retention of volunteers require special skills and knowledge. Yet they also have come to realize that in certain areas, such as the meeting of mutual expectations and the provision of quality service and leadership, similar conditions need to prevail for paid and volunteer staff.

The American Red Cross has reconciled these two aspects of volunteer administration by developing a performance management system for volunteers that parallels the performance management system for paid staff. The system is based on individual performance standards which tie into unit performance standards and organizational objectives.

The performance standards are agreed-upon goals to be achieved over a set time. The goals are negotiated. The negotiation process adapts a generic job description (1) to the particular circumstances (time commitment, time availability, skills, interests) of the volunteer and (2) to the needs of the unit. Significantly, the performance standards include not only specific performance goals for the volunteer but also specific undertakings of support to the volunteer on the part of the unit and the organization.

Standards of performance and performance review are not new to the American Red Cross. Volunteer performance in client services such as casework, disaster assistance, instruction of Red Cross courses, has always been subject to quality control and performance assessment. What is new is the attempt to formalize the process, to introduce the element of negotiation and individualization so necessary in volunteer involvement, and to include leadership volunteers and organizational support volunteers in the system. Leadership volunteers include both governance volunteers (board members) and volunteers at the managerial and supervisory levels.

In all cases, the standards permit appraisal of progress toward goals and of the adequacy of organizational support. In other words, performance appraisal at its best reviews the degree to which the mutual contract between the volunteer and the organization has been fulfilled. Periodic resetting of goals give both the volunteer and the organization an opportunity to restate or refine their expectations.

### *Developing Nonexploitative Relationships with Volunteers*

At the heart of the performance standard contract is the belief that a volunteer's commitment must never be exploited. When volunteers are pressured to work longer hours than were anticipated or negotiated, they feel exploited. When volunteers are led to expect developmental and resumé-building opportunities and are not provided them, they feel exploited. Yet because of their enthusiasm and sense of commitment, volunteers often make easy prey.

The following are the essential elements of a positive, nonexploitative relationship between volunteers and the organization they serve:

- Faithfulness to mutual expectations
- Placement that matches the volunteer's skills, interests and expectations
- Adequate job preparation
- Accurate job description
- Adequate tools and administrative and supervisory support for efficient job completion
- Adequate career development opportunities including awareness of new job openings and access to training (job related or not)
- Appropriate recognition in keeping with the volunteer's motivations and goals
- Easily understood award and promotion systems
- A straightforward succession plan for leadership jobs
- Responsive grievance procedures
- Accurate, complete, and accessible personnel records
- Inclusion in appropriate meetings and social events

### *Involving Volunteers in Management*

The VOLUNTEER 2000 STUDY revealed that volunteer involvement in the American Red Cross falls into four categories: governance, advisory, management, and service (service either to clients or in organizational support). It revealed also that both paid staff and volunteer staff feel overwhelmingly that there is no job in the organization which is intrinsically inappropriate for a volunteer with the necessary skills and time commitment. And it revealed thirdly that indeed there is no job which somewhere and at some time has not been handled by a volunteer.

While governance, advisory, and service roles for volunteers are standard practice in the nonprofit sector, the extent of the volunteer role in senior and middle management in the American Red Cross is exceptional. The volunteer management role has its roots in the history and philosophy of the American Red Cross which for the first decades of its existence was an organization directed and staffed exclusively by volunteers, and in which even today the majority of small chapters are all-volunteer. The Red Cross philosophy considers paid staff to be enablers of, and not substitutes for, volunteers and provides that the principal management roles be filled by volunteer and paid managers working together and sharing responsibility.

The consequences of the volunteer management role are many and beneficial:

- Well matched management team partners bring increased depth and breadth of expertise, expanded geographic coverage, and varieties of style and perspective to the management task.
- Management positions, either solo or team, provide volunteers with management experience—a valuable recruitment tool and an asset to take into the job market.
- Management positions "empower" volunteers to design, influence and, in some instances, control the programs to which they lend their services. Volunteer empowerment, com-

mensurate with responsibility, is an important element in the retention of capable and dedicated volunteers and a source of great strength to a volunteer organization.

- Volunteers in management and supervisory jobs and with management and supervisory experience often eliminate the need to hire additional paid staff every time a new program is introduced or the level of activity increases.
- Volunteers present in both senior management and governance positions help to assure that the organization will not undertake any major initiatives or policy changes that would disrupt volunteer participation.

*Looking Beyond Volunteer Numbers*

The heightened competition for volunteers among a rapidly increasing number of volunteer-intensive organizations and programs often obscures the fact that successful volunteer involvement should not be measured by volunteer numbers alone. It is rarely thought strange that while paid staff is always exhorted to do more with fewer people, volunteers are usually exhorted to increase their numbers.

This is partially because of image pressures and partially because volunteers are often pictured vaguely as "increased capacity" rather than as persons recruited for well defined jobs or specific projects. The VOLUNTEER 2000 STUDY suggests that increases in volunteer productivity as well as more disciplined recruitment are means by which to bring about greater volunteer involvement.

Tools for more productive volunteer recruitment include:

- periodic assessment of long-term and short-term human resources needs with recruitment policies closely tied to these assessments;
- internal recruitment, resulting in a more flexible volunteer force, more well-rounded volunteers, and a decrease in volunteer burn-out;
- targeted recruitment, resulting in the recruitment of volunteers who are particularly suited to, or interested in, areas of specific organizational need;
- *immediate* and *well prepared* opportunities for volunteers recruited via media or other broad gauge recruitment efforts (nothing is thought to discourage volunteers more than responding to an appeal and finding the organization not ready);
- clearly assigned responsibility for volunteer recruitment to pinpoint accountability;
- careful job preparation before the volunteer's arrival and adequate supervision and training subsequently;
- acute awareness of the motivations and expectations of individual volunteers so as to provide a satisfying volunteer experience.

*Looking to Collaboration Among Nonprofit Organizations as a Means to Maximize Volunteer Opportunities and Effectiveness*

The number of causes and organizations served by volunteers has grown by geometric progression in recent years. This trend shows no signs of abating. Ever expanding and more affordable communication technologies, as well as the increase in the number of issues, problems, and conditions raised to the public consciousness, will speed up the multiplication of agencies and membership groups even further.

The existence of a large number of nonprofit organizations is in many ways advantageous because it means specialization, variety and healthy competition. The disadvantages are duplication, scattering of resources, and an overwhelming number of choices for financial contributors and volunteers.

Adding healthy collaboration to healthy competition among nonprofit agencies will be the key to effective volunteer management and service delivery in the future. Collaboration already exists in many areas such as in United Way and Combined Federal Campaign fundraising and in programmatic partnerships such as those Red Cross has with many disaster relief groups. Collaboration needs to be expanded in volunteer related fields as well.

Areas where collaboration can be expanded are:

- *Volunteer referral* — While Volunteer Action Centers have sprung up in many communities and volunteer referral positions have been established on many military installations, much more can be done by the hands-on agencies themselves to place volunteers with organizations other than their own and to refer clients to other agencies.

- *Volunteer loans and exchanges* — Nonprofit agencies can promote volunteer loans and exchanges similar to college programs that allow semesters at other schools. This would be especially beneficial for volunteer leaders and specialists.
- *Shared training and expertise* — Different agencies bring different types of expertise to the nonprofit sector and should promote systematic sharing of that expertise through joint training ventures. Such opportunities already exist at national conferences held by national organizations. Now is the time to create more local and regional opportunities and train more local instructors.
- *Recognition of each other's strengths* — If they hope to share each other's expertise, agencies must find better means to keep abreast of what is happening in other organizations.
- *Sharing of infrastructure* — The emergence of umbrella organizations in the nonprofit world such as VOLUNTEER: the National Center, Independent Sector, and Campus Compact, to name but a few, has been a very positive factor. Agencies economize by sharing resources. Also, joint policy pronouncements raise the profiles of the nonprofit sector to the benefit of all its members. Innovative initiatives at local levels, in such areas as child and elder care, should be explored.
- *Laboratories for new ideas* — As new ideas for programs and for volunteer involvement are developed by policy makers and experts, hands-on agencies should volunteer to conduct small pilot projects with the purpose of making the results available to all. The VOLUNTEER 2000 STUDY suggests such a role for Red Cross chapters.
- *Crosscutting opportunities* — A growing number of organizations are combining very different programs and types of volunteers in joint undertakings. One imaginative initiative brings together museum volunteers and volunteers servicing the homeless. Together they conduct museum tours for the homeless in the belief that hearts and minds need as much nurturing as bodies. More such bold initiatives are needed.
- *Linking up with other sectors* — Creative volunteer activity is increasingly occurring in the government and corporate sectors of our society. The nonprofit sector needs to share its expertise and experience with the public and private sectors and, in turn, benefit from developments there.

In the best of all possible worlds, we are all volunteers. The ten basic principles which summarize the conclusions of the VOLUNTEER 2000 STUDY suggest how we can move toward that goal as we get ready to enter the 21st Century.

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*Editor's Note*: The American Red Cross received the 1989 National Service Award from the Association for Volunteer Administration in recognition of what it does for volunteers and volunteerism. This article reflects the continuing commitment of the Red Cross to understanding and preparing for what lies ahead.

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The VOLUNTEER 2000 STUDY was conducted by the Department of Corporate Planning and Evaluation at American Red Cross National Headquarters. Project co-directors and co-authors were Frank Larkin and Maria P. Smith.

ABSTRACT

*In response to the challenge to accurately and appropriately assess the value of volunteer efforts, this article offers a naturalistic approach which focuses on the impact of service delivery in the lives of clients. The article describes the establishment of outcome measures, data gathering processes, and the presentation of assessment information.*

# Valuing Volunteers: A Naturalistic Approach

**Kathleen M. Curtis and James C. Fisher, Ph.D.**

## INTRODUCTION

As potential funding sources approach the difficult task of allocating resources to the voluntary sector, they are increasingly interested in evidence of effective program outcomes. In order to survive, agencies need well-developed methods to gather and present information which describes both service effectiveness and efficiency with precision. The current emphasis on accountability poses a special challenge when attempts are made to assess services delivered by volunteers.

Two familiar methods have been used to assess the efforts of volunteers: 1) collection of statistical data on the amount of volunteer effort, and 2) analysis of replacement costs of equivalent positions. Each of these methods has limitations in its ability to present information which accurately reflects the impact of volunteer programs on the lives of clients. This article reviews these limitations and proposes a naturalistic approach which allows decision makers and funding sources to assess the value of volunteer services on the basis of a more appropriate presentation of program outcomes.

### *The Traditional Approaches*

One traditional approach used to describe the results of volunteer programs has been to assess the work of volunteers through a form of effort evaluation. This familiar approach involves compilation of statistical information on the number of volunteers involved, the hours of volunteer service provided during a given period of time, and the number of clients served. No indication of quality of services or actual outcomes experienced by clients are reflected in this form of assessment. The number of volunteer hours and clients served provide only a partial view of the program unless accompanied by information which describes the extent to which program goals were met and clients were impacted by the activity of volunteers. This form of assessment fosters the misguided notion that since volunteers do not charge for their services, their efforts need not be evaluated for effectiveness. From it one is expected to infer that because volunteers are doing something, they must be doing some good.

A more recent method presented as a means of assessing the value of volunteer efforts is the assignment of a replacement cost for "equivalent services," as if they were to be purchased from paid employees rather than provided by volunteers (Karn, 1983). In order to determine replacement costs, the program manager identifies a paid employment classification which is judged to be equivalent to the types of services provided by volunteers. The hourly rate of pay for that employment classification is multiplied by the number of volunteer hours to arrive at "true value." The costs of paid staff benefits and indirect service time may also be considered as part of this formula.

Although the replacement cost approach to valuing volunteer services offers interesting mathematical computations, it promotes acceptance of the traditional school of thought which implies that an assessment of volunteer efforts can and

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should be translated into dollars without regard for those intangibles which are a valued component of volunteer services.

*Why Volunteers?*

The use of effort evaluation or replacement analysis may be appropriate if an agency's rationale for involving volunteers in service delivery were based entirely on budgetary considerations. In that instance, given available funds, paid staff would more likely be employed than volunteer staff, since volunteers are primarily valued because they provide relatively inexpensive labor. Widespread efforts to assess volunteer service solely from the standpoint of monetary input prompt the fundamental question, "why volunteers?"

If an agency chooses to involve volunteers primarily because it values the unique nature of the contributions volunteers bring to service delivery, then comparisons of paid staff time and volunteer time based on monetary considerations do not provide a valid comparison since the true value of volunteer efforts is reflected in terms of outcomes rather than inputs. Valuing volunteer services based on outcomes experienced in the lives of clients allows the agency to be consistent with its rationale for involving volunteers in service delivery. These outcomes can be measured and described through an alternative, naturalistic approach which describes the impact of volunteers' services on agency goals using both qualitative and quantitative measures. When compared with use of input measures, this approach is more appropriate and useful. Additionally, it celebrates the unique difference between the contributions of paid staff and volunteers.

The naturalistic approach is also more compatible with the feelings volunteers express regarding the value of their efforts. Volunteers, as well as managers of volunteer programs, have typically felt uncomfortable attributing dollar value to volunteer services based on cost comparisons between volunteer efforts and those of paid staff. Volunteers frequently display negative, often vehement reactions against such suggestions, preferring recognition of the uniqueness of their services with descriptions such as "irreplaceable" and "invaluable." Basic to their feelings is a sense that the value of volunteer time falls somewhere outside of the economic norm and therefore should not be measured against a monetary standard. One reason for the reluctance to accept a monetary standard as a measure of value for volunteer efforts may lie in the fact that it reduces considerations of value to those readily translated into monetary measures. The naturalistic approach is likely to be positively received by both volunteers and managers of volunteer programs since it allows the question of value to include the unique and diverse nature of volunteer efforts.

*Equivalency or "Bread and Roses"?*

In a social service setting, there are often some apparent similarities between paid staff and volunteer staff: both engage in forming a relationship with the client for an agreed-upon purpose, both use the structure of the agency or program as a way of setting boundaries on their time and effort, and both are committed to giving of themselves to the client. However, it is the *nature* of the relationship that is the difference.

A comparison of paid staff and volunteer time is basically inappropriate because of their incommensurability. They are sufficiently different in principle so that a common basis of comparison with respect to both their time and the results of their efforts is inappropriate. The metaphor "bread and roses" provides a descriptive illustration of the concept of incommensurability as it relates to the intrinsically different roles of paid staff and volunteers. In a social service setting, the way in which paid professionals (the "bread") give of themselves to promote client healing and growth is based on a theoretical framework and practice model analogous to the recipe and procedure used in making bread. The way in which volunteers ("the roses") develop a relationship with a client is through a nurturing, "blossoming" transaction, a spontaneous *being with* the other person that is rich in humanity and carried out with personal distinctive style. Not only is it closer to a friend/friend relationship, it can represent, or take the place of, some family involvement. Both paid staff and volunteers have a particular job to do, but the outcomes of the efforts of each vary because of these basic differences in direction.

The naturalistic approach to assessing the value of volunteer efforts recognizes these differences and allows decision makers and funding sources to fully appreciate the unique outcomes of volunteer efforts.

*Valuing Intangibles*

Whereas the traditional approaches assess the value of tangible considerations which can be readily translated into monetary terms, an advantage of the naturalistic approach is that it can provide a means to communicate information regarding the intangible outcomes which occur when clients are favorably impacted by services provided by volunteers. The descriptive, qualitative information which is gathered and presented through the naturalistic approach can help decision makers and funding sources gain increased insights to the client-related outcomes which can be linked specifically to the efforts of volunteers. These include such things as clients' increased self-esteem, improved judgment, growing ability to nurture others, etc. Although decision makers and funding sources may currently request effort evaluation or replacement cost analysis, managers of volunteer programs can, through the naturalistic approach, offer more useful information which will allow others to fully appreciate and understand the value of the volunteer efforts.

## AN ALTERNATIVE: THE NATURALISTIC APPROACH

The primary advantage of the naturalistic approach is that it provides a better "feel" for the role of volunteers and how their efforts contribute to program success. "Naturalistic" is a particularly apt description for this approach, as it allows the inherent, spontaneous, subjective characteristics of volunteer involvement to be considered in an assessment of the value or worth of volunteer programs. The naturalistic approach includes the following elements:

- indication of outcomes evidenced in the lives of program participants and/or the community,
- identification of causal linkages between volunteer activities and outcomes,
- and presentation of qualitative information in quantitative terms.

The naturalistic approach involves three essential steps which may be modified to reflect the unique characteristics of individual programs and their impact.

*Step 1: Establishment of Outcome Standards and Measures of Success in Relation to Program Goals*

The naturalistic approach can and should begin with a descriptive statement regarding the number of clients, hours of service, and cost of the program. This information is provided to give decision makers and funding sources a perspective regarding the scope of the program.

The outcome standards describe program goals in terms of desired impact in order that program success can be measured against a predetermined standard. The focus is on results experienced by a specific client population and/or community rather than simply on the amount of effort to be expended through program implementation. The number of outcome standards set for each program may be one or as many as five, depending on the scope of the program.

An example of the type of descriptive information which precedes the outcome standard statements:

*The "Family Life Education" program will be successful if at least 300 participants are provided with 1,200 hours of service at a total cost of $10,000, resulting in at least. . .*

Examples of a variety of program goals and measures of success written in the form of outcome standard statements:

- 90% *of program participants will report increased ability to deal effectively with their anger and/or stress.*
- 80% *of program participants will increase educational achievement levels by* 20% *or more.*
- 75% *of parents who participate in the program will report increased involvement and satisfaction with their children's education.*

- *90% of teen mothers who participate in the prevention program will not have a repeat pregnancy during their remaining teen years.*

As a variation to step 1, an organization which involves volunteers in a broad community-wide effort rather than one limited to a specific group of participants may develop outcome standards which reflect results felt by the community as a whole:

For example:

*The Teen Pregnancy Prevention campaign, sponsored by a group of local television stations will be successful if the city experiences at least. . .*

Examples of broad-based program outcome standard statements:

- *a 20% decrease in the community's teen pregnancy rate.*
- *a 20% increase in the community's high school completion rate.*
- *a 10% increase in minority employment.*

Another variation to step 1 is to define a range of percentage levels which indicate varying degrees of success, *i.e.*, the program will be highly successful if 80%–90% of program participants report increased ability . . . , moderately successful if 60%–80% report increased ability, etc.

*Step 2: Development of Processes to Collect Data to Demonstrate the Degree to Which Outcome Standards Established in Step 1 Are Achieved*

In this step, both qualitative and quantitative data may be collected, but the emphasis is primarily on qualitative data and evidence of the intangible benefits experienced by participants. Data is compiled and interpreted to reflect progress toward the outcome standards established in step 1. Where possible, collection instruments and processes are designed to specifically link volunteer efforts to outcomes in order to substantiate the role of volunteers in program success. Managers of volunteer programs have an opportunity to use their creativity as they develop various means of data collection and present the data for use by decision makers and funding sources. Two ideas for data collection techniques are a) Goal Attainment Scaling and b) Client Survey.

A. Goal Attainment Scaling

This type of data collection provides evidence of causal linkages between volunteer activities and the achievements of program goals and outcome standards as in the following illustration of a form of goal attainment scaling used in the Family Aide program at Family Service of Milwaukee.

In this program, a volunteer is matched with a socially isolated, troubled teen mother who is at risk of child abuse and neglect, alcohol and/or drug abuse, and other serious problems. The volunteer and client form a friendly relationship in which the volunteer serves as a mentor and role model regarding parenting and social skills and helps the teen work toward personal growth. This program has some similarities to other social service programs which match a volunteer friend to a client with needs: Big Brothers/Big Sisters, Advocates for Retarded Citizens, Compeer (friends for the mentally ill), and volunteer programs working with at-risk youth in schools or the criminal justice system. Although other social service programs could benefit from this technique by adapting it according to their unique services, goal attainment scaling works particularly well in programs where volunteers have a one-to-one relationship with clients.

The goal attainment scaling technique used in Family Aide is an adaptation of a method developed to evaluate comprehensive community mental health programs (Kiresuk & Sherman, 1968). Goals are established once the volunteer and client have successfully established a relationship, usually after three to five meetings. The volunteer determines the specific goals on which she will work with her client, often in consultation with the program manager and/or social worker. In other types of programs in which the client is at an emotional and intellectual level which allows for participation in goal-setting, the client may also be involved in goal selection.

In setting these goals, the volunteer Family Aide links the activities of the program in a tangible way to the outcome standards determined by step 1. This linkage describes the role of the volunteer as the major variable in the level of outcomes achieved by the program. Goal selection also provides volunteers with a foundation from which to structure their activities and discussions with the client. Charting client progress toward goals also provides volunteers with feedback on their effectiveness.

One of the Family Aide outcome standards is that at least 90% of the teen mothers who participate in the program demonstrate improved parenting skills. In goal attainment scaling, the volunteer selects goals which can reflect progress toward this outcome standard and tailors those goals to the individual needs of her client. For example, for a client who has had a record of child abuse and/or neglect, the volunteer may select one or more of the following goals: The client demonstrates. . . .

1) an increase in behaviors which demonstrate nurturing and protective parenting,
2) an increase in behavior which demonstrates an ability to handle anger and stress effectively and nonviolently,
3) an increase in behaviors which demonstrate an understanding of infant developmental stages and acceptance of the behaviors which can be expected of the child at each stage.

Family Service of Milwaukee uses a case management system which includes forms which are used to document client progress toward goals over time. After goal selection, the volunteer in consultation with the program manager or social worker, describes potential outcomes in five different categories which focus on the various levels of success possible, ranging from least to most favorable outcomes thought likely for the particular client (see Appendix A). The outcome scales, or levels of predicted goal attainment, are specific to individual teen mothers. The volunteer then charts client progress toward these goals at regular intervals over the space of a year, using the form contained in Appendix B.

The goal selector (the volunteer) may choose to specify priority by establishing a set of weights for the goals, reflecting her appraisal of the value each goal has in indicating a successful outcome in the life of the client. This is not a necessary component of goal attainment scaling since equal weighting of goals does not lose information or decrease indications of program outcomes. Its primary function is to provide the volunteer with a means to sort out the relative importance of the various goals selected for the client.

B. Client Survey

Another way to gather qualitative data on outcomes which reflect significant changes in clients' lives and behaviors is to gather their responses to a Client Survey (see Appendix C). The survey may be administered in written form or may be done orally with clients who are illiterate or for whom English is not the primary language. If done orally, it may be best to involve a neutral third party rather than the volunteer to administer the survey so that client responses will be as open as possible.

The program manager summarizes and interprets client statements to reflect progress toward program outcome standards. For example, a Family Aide client described her relationship with the Family Aide in the following way:

> *We are very close now. She has filled my life with many possibilities in religion, connections in business and knew the right persons to talk to whenever I had a question or a need.*

In describing the helpfulness of the Family Aide volunteer, a client said:

> *My friend provided me with social outlets. I got to see her family and hear her tips on parenting (she has seven children). She helped me when I needed her, supported my efforts to finish college, applauded my accomplishments and final attainment of a career. I attended her family gatherings and she attended mine. She is my daughter's godmother and was my sponsor to join the Catholic Church. She is the exact model of a perfect friend and she is my "best friend."*

These responses were summarized and interpreted by the program manager in the following way:

*The client is seeing new possibilities for her life, she is more aware of resources and social outlets. She has grown from tips on family and parenting, and her self-esteem is increased from the support and applause of her volunteer friend. She has attained school and career goals and has been proven competent and worthy. She has grown spiritually. She has had a model of a "perfect friend."*

Social workers, volunteers and/or program managers can add their own observations to the client surveys, indicating areas in which they have observed client growth during the relationship with the volunteer. In the above case, one social worker added: "The client has become a successful single parent, and although also challenged by a physical disability, she graduated from college and attained a job which allows the family to be off general assistance for the first time." Parent reports can also be used in a similar way if working with adolescents or youth.

In addition to collecting qualitative data through techniques such as goal attainment scaling and client surveys, step 2 may also include the gathering of quantitative data where possible. The latter can take the form of such things as test scores, pre- and posttest comparisons, school reports, statistical information, and longitudinal records.

### *Step 3: Preparation and Presentation of Information for Reports to Decision Makers and Funding Sources*

The data collected through the goal attainment scaling and client surveys are necessarily more descriptive in nature than the data collected through traditional input measures alone and are therefore less adaptable to brief, succinct statements. However, the qualitative information can be presented in a quantitative way by linking it to the outcome standards and at the same time offering the reader a fuller appreciation of the impact of the program.

Information gained through the goal attainment scaling process can be compiled and converted to statements which reflect progress toward desired outcomes such as the following: "In 80% of the volunteer/client relationships, teens achieved more than expected levels of progress toward goals; 60% of these were in the areas of protective parenting, and 70% in the areas of decreased social isolation."

Client survey results can also be quantitatively related to program outcome standards. For example, outcome standards established for the Family Aide program refer to increased self-esteem, parenting skills, and social interactions/communication skills in at least 80% of the clients. The program manager reviews responses to the client surveys and interprets those responses to determine which clients have grown in the above-mentioned areas, and to what degree. A summary statement on each area can be developed, including such statements as "80% of clients report increased parenting skills as evidenced by such things as increased responsiveness to their child's emotional needs," or "75% of clients gained in communication skills as evidenced by their ability to handle anger or solve problems."

Selected quotes from client surveys and observations made by volunteers, social workers and program managers through the goal attainment scaling process can add flavor to the assessment of the value of the program and provide evidence of the intangible, difficult to measure, or unforeseen benefits which occurred through the delivery of services. A specific case study of how a volunteer worked with a client to achieve progress toward specific goals can provide the reader with a fuller understanding of the therapeutic nature of the volunteer/client relationships developed through the program. Examination of client feedback and of goal attainment data, presented anonymously, provide the means for a valid assessment of the value of volunteer services in the achievement of agency goals.

## SUMMARY

Traditional methods of assessing the value of volunteer efforts have relied principally on quantitative data to allow for convenient translation to monetary values. Use of the monetary standard as a basis upon which to determine the worth of volunteer efforts may at first glance appear appropriate, yet upon closer inspection it becomes apparent that these traditional methods fail to consider service effectiveness. The naturalistic approach provides this ingredient by focusing on output measures rather than merely on the traditional input information.

The naturalistic approach to assessing the value of volunteer services is designed to focus on output measures as evidence of program benefits rather than merely on the traditionally-used input measures. Managers of volunteer programs who choose to use the naturalistic approach may wish to address the need by funding sources and decision makers for assistance in understanding the advantages of outcome standards and the concept of reporting qualitative data in quantitative terms. Such obstacles notwithstanding, the use of outcome measures, especially those documented with naturalistic data, may be more in keeping with the intrinsic value of volunteer services as described by both volunteers and clients.

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## APPENDIX A

FAMILY SERVICE OF MILWAUKEE
FAMILY AIDE PROGRAM

### GOAL-ATTAINMENT SERVICE PLAN

Client Name ______________________ Volunteer ______________________

Client-Specific Goals
(use separate form for each goal)

GOAL:

Least Favorable
Outcome Thought
Likely

Less Than
Expected
Success

Expected Level
of Success

More Than
Expected
Success

Most Favorable
Outcome Thought
Likely

Beginning Date: ________ Review Date: ____________ Closing Date: _________

## APPENDIX B

FAMILY SERVICE OF MILWAUKEE

FAMILY AIDE PROGRAM

## PROGRESS CHART/DATA BASE

Client: ______________________ Volunteer: ______________________

Goal Statement:

Starting Point:

| Review Date | Activity/Observations | Level of Progress |
| --- | --- | --- |
| | | |

## APPENDIX C

FAMILY SERVICE OF MILWAUKEE FAMILY AIDE PROGRAM

### CLIENT SURVEY

DATE: ____________________ NAME OF CLIENT: ______________________________
(VOLUNTARY)

1. How long did you have a volunteer friend from Family Service?

2. How frequently did the two of you meet? ____ Weekly ____ Every other week
____ Other (specify)

3. What kinds of activities did you do?

4. How was your child (or children) involved with her?

5. Please provide a brief description of your volunteer friend.
Indicate what she was like, what kind of person.

6. How did you feel about the time you spent together, and the activities you shared?
Indicate if you wish you had done different things.

7. Some of the aims of the Family Aide Program are:
(1) to help single parents have social activities,
(2) to provide a role model for healthy parenting,
(3) to encourage single mothers to continue their own growth and development.

Please describe the way in which your Family Aide volunteer friend was most helpful to you. Expand on this a little: What has it meant to you, personally, and as a mother, to be a part of this program? (Use reverse side of paper as needed.)

THANK YOU FOR TAKING TIME TO COMPLETE THIS FORM

ABSTRACT

*During the past decade, the proliferation of managed care plans and the reduction of governmental reimbursement has seriously eroded hospital revenues.*

*As a result, hospitals are managing with less resources yet confronting more complex patient problems, particularly in the Emergency Department of the hospital.*

*Since the Emergency Department is frequently the major interface between the hospital and the community, it is essential that patients have a positive experience while obtaining care. This study explores the impact of a hospital-based volunteer program upon patient satisfaction within an Emergency Department and the implications for hospital administrators.*

# Patient Satisfaction Within an Emergency Department: The Impact of a Hospital Volunteer Program

**Anne Walsh, Helen Bloom, and Jack Rappaport**

## FACTORS INFLUENCING EMERGENCY DEPARTMENT TREATMENT

Frequently, the Emergency Department is the primary interface between the patient and the hospital. Decisions related to the need for emergency care, however, often circumvent the traditional physician-referral mechanisms and rely to a large extent upon self-referral. Wood and Cliff (1986) discovered that 42% of the patients in their survey did not consult with their private physicians based upon their perception of an immediate need for treatment and the potential absence of ancillary services in a private practice. In particular, patients who perceive a need for x-ray and laboratory procedures were less likely to consult with their private physicians.

Conversely, patient decisions related to the selection of one Emergency Department over another Emergency Department are significantly influenced by the proximity of care, physician affiliation, and previous satisfaction with care. While issues of access and physician affiliation strongly influence institutional selection, 35.3% of the patients in a study by McMillian, Younger, and DeWine (1985) cited previous satisfaction as a key consideration in the selection of an Emergency Department.

In a similar vein, Locker and Dunt (1978) contend that patient satisfaction also influences whether a person complies with a treatment and maintains a continuing relationship with a provider.

Patient satisfaction, however, may not necessarily be influenced by normative clinical and administrative criteria but rather by the extent to which the care conformed to the patient's expectation of care. Expectations are confirmed when a service is delivered as expected and disconfirmed when the service is less than expected. Frequently, it is the magnitude of the disconfirmation experience that results in satisfaction or dissatisfaction with a service or product (Churchill and Surpenant, 1982).

## MANAGEMENT DILEMMAS IN THE PROVISION OF EMERGENCY SERVICES

Conflict is an inherent characteristic of emergency room operations. Clinical staff typically perceive their goals as the provision of sophisticated crisis-oriented services while patients often utilize emergency services as a substitute for a primary care visit (Katz, 1973). It is not surprising, therefore, that Smeltzer and Curtis (1986) in a random informal survey of eight hospitals reported waiting times ranging from

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one to four hours in duration with an average waiting time slightly above two hours.

In addition to lengthy waiting times, Lane and Evans identified impersonal attitudes of the emergency room staff and lack of information about patient status as key variables which affected satisfaction with service. Subsequent studies by McMillian, Younger, and DeWine (1986) suggest that communication provided to the patient and persons accompanying the patient is an often ignored dimension of care and may contribute to patient dissatisfaction.

## IMPETUS FOR THE EMERGENCY ROOM VOLUNTEER PROGRAM

Statistics from the Emergency Department of Albert Einstein Medical Center in Philadelphia indicate that approximately 40,000 patients are treated on an annual basis. Usually, these patients are accompanied by two or three significant others which suggests that 120,000 to 160,000 individuals have direct contact with the department. Many of the patients receiving treatment are indigent individuals or recent immigrants who do not have a primary care physician. Consequently, the need for empathic and accurate communication between the clinical staff and patient is enhanced.

In order to address issues of communication involved in the delivery of emergency room services, a pilot program relying upon hospital and community volunteers was initiated in July of 1986. Essentially, the goals of the volunteer program focus upon increased communication between emergency room staff and patients (see Table I). Volunteers offer psychological support, interpret emergency room policies and procedures, and provide information on the process of care to patients and their families. In some cases, volunteers also assist with discharge functions for the patients.

Although the clinical staff and administration recognize the pivotal role performed by the volunteers, information related to the impact of volunteer activity upon patient satisfaction had not been evaluated. Since patient satisfaction is crucial not only to the preservation of a continuous relationship with a provider but also to the retention of a favorable image within the community for the department, further studies related to the impact of volunteer intervention upon patient satisfaction were initiated.

## RESEARCH DESCRIPTION

In February, March, and April of 1988, a random telephone survey was conducted approximately one to two weeks after the patient visit to the Emergency Department. During this period, 75 patients were contacted and 66 patients completed interviews resulting in a response rate of 83%. Patient logs from the Volunteer Department were used to identify those patients in the experimental group who received volunteer services and a control group was developed utilizing emergency room logs which indicated the hours when the volunteers were not present.

Global satisfaction scores were adopted from the Larsen, Attkinson, and Hargreaves index which was designed to measure satisfaction within human service agencies (see Table II). Comparative health indices to measure patient satisfaction on a global basis are not as well represented in the health administration literature. In fact, few articles related to the quality of health services were published prior to 1960. Studies which were conducted emphasized structural measures which focused on the organization of the institution or process studies which validated the appropriateness of particular treatments in comparison to medical standards (Lebow, 1974). Partially, the absence of a global measure is due to institutional auspice and locus of service as well as the associated dilemma of measuring variations in medical practice patterns within the same environment (Lebow, 1974).

Although global measures are useful from a research perspective, their relevance is limited to the manager who may be interested in modification of specific attributes within the health delivery system. Typically, global measures amplify satisfaction with service while neglecting to measure the specific attributes which contributed to patient satisfaction. Consequently, intervention to rectify or expand specific facets of service is impeded (Locker and Dunt, 1978).

Recent studies have developed mea-

## TABLE I

## VOLUNTEER FUNCTIONS IN THE EMERGENCY DEPARTMENT

### Administrative Functions

Provide explanation of waiting time to patients.
Explain the procedures in the Emergency Department to patients.
Escort patients to waiting areas or other hospital areas.
Provide periodic information about treatment to patients and family members.

### Psychosocial Functions

Provide support to patients and families.
Initiate contact with family members or escorts.
Assist patients or families with refreshments or reading material.

### Discharge Functions

Provide information about transportation.
Assist with transportation when requested by clinical staff.

## TABLE II

## GLOBAL SATISFACTION SCALE*

(1) To what extent did the Emergency Department meet your needs?

______ Almost all of my needs have been met

______ Most of my needs have been met

______ Only a few of my needs have been met

______ None of my needs have been met

(2) In an overall, general sense, how satisfied are you with the services you received?

______ Very satisfied

______ Mostly satisfied

______ Indifferent or mildly satisfied

______ Quite dissatisfied

(3) If you were to seek help again, would you come back to our emergency room?

______ No, definitely not

______ No, I don't think so

______ Yes, I think so

______ Yes, definitely

* Larsen, Attkinson and Hargreaves Index

sures to evaluate patient satisfaction in relation to specific attributes within the health delivery system. Many of these studies have focused on the clinical as well as the institutional variables which may potentially affect satisfaction (McMillian, Younger, and DeWine, 1986). Since institutional variables such as access and comprehensiveness of care are integral components of the Emergency Department experience, questions which assessed patient satisfaction with these variables as well as satisfaction with the quality of medical care were analyzed in the study (see Table III).

## DISCUSSION OF RESULTS

Sixty-six surveys were evaluated in the study. Thirty-three interviews were obtained from individuals in the experimental group who received volunteer services, and thirty-three interviews were analyzed from participants in the control group. Initially, a t-test was conducted to measure differences in global satisfaction between the control and experimental groups.

Global satisfaction scores measured the extent to which the Emergency Department services met the patient's needs, patient satisfaction with the services which were provided, and the willingness of the patient to use Emergency Department services in the future. Significant differences in patient satisfaction between the experimental and control groups emerged ($t = 4.24$, $p < .05$) which suggests that volunteer intervention contributed to patient satisfaction as well as a tendency for patients to express a desire to use Emergency Department services in the future.

Further analysis to assess differences in patient satisfaction with the comprehensiveness, quality, and access to care was also conducted using a series of t-tests to measure differences in mean satisfaction

**TABLE III**

**EMERGENCY SERVICE DELIVERY ATTRIBUTES**

Sources of Satisfaction:
(Scale: 5 = high satisfaction; 1 = low satisfaction)

1. Access to Care:
   - ______ signs posted to emergency room area
   - ______ information requested upon arrival in emergency room
   - ______ waiting time prior to treatment

2. Comprehensiveness of Care:
   - ______ comfort of waiting area
   - ______ cleanliness of waiting area
   - ______ waiting time for x-ray, lab results, etc.
   - ______ availability of facilities (bathrooms, cafeteria)

3. Quality of Care:
   - ______ interest of medical staff and nursing staff in your condition
   - ______ courtesy extended by clinical staff to you and family
   - ______ explanation provided about treatment
   - ______ quality of treatment which you received

scores between the two groups. Patients in the experimental group again demonstrated a higher level of satisfaction with the comprehensiveness of care provided by the institution ($t = 3.56$, $p < .05$). This finding is particularly interesting because these measures were designed to assess the patient's perception of the comfort and cleanliness of the waiting area, waiting time for ancillary services, and the availability of support services. Invariably, the communication provided by the volunteer appears to mitigate delays intrinsic in the provision of ancillary and support services and to minimize inconveniences which are inherent in most waiting areas of Emergency Departments of urban institutions.

Statistical differences related to the quality of health services delivered by the clinical staff also emerged between the control and experimental groups ($t = 5.66$, $p < .05$). Individuals in the experimental group expressed a higher level of satisfaction with the courtesy and interest of the medical staff and appeared more content with the explanations of treatment which they received from the medical staff.

Conversely, volunteers had virtually no impact upon patient satisfaction with access to health services. Patients in the control and experimental group expressed dissatisfaction with prolonged waiting periods for treatment in the Emergency Department. Although the mean satisfaction score for the experimental group (2.75) was slightly higher than that of the control group (2.5), this finding was not significant at the .05 level ($t = 1.25$) and indicates no difference in satisfaction between the two groups.

## IMPLICATIONS FOR HEALTH MANAGERS

Due to the nature of emergency medicine, administrators may not be able to alleviate problems associated with extended waiting times. In most cases, those patients with critical symptoms will receive immediate treatment while those with less severe complaints will have to wait for care despite the best intentions of management. Since administrators may not be able to consistently influence this dimension of care, it is crucial that other components of the emergency room experience contribute to a satisfactory experience for the patient.

Patients continue to use services which meet their expectations, and they also tend to share their impressions about particular services with others in the community. Studies by Diener and Greysen (1978) confirmed that at least 34% of those dissatisfied with a product will communicate this information to other individuals. Consequently, administrators must be cognizant of the ultimate impact of patient satisfaction upon future referrals and image in the community.

In an era of declining revenues and professional shortages in hospitals, volunteer involvement can be instrumental to the preservation of patient satisfaction within an Emergency Department. Volunteers can not perform functions which are obviously within the domain of the health care professional. They can, however, document incidents which require further investigation or alert administrators to problems in service delivery. More importantly, they can humanize the health care system for the patient by interpreting the bureaucratic structure of the hospital or by offering psychological support during a crisis, functions which to a large extent enhance the satisfaction of a patient in the emergency room and contribute to a positive image for the hospital within the community.

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# Easy Does It: Initiating a Performance Evaluation Process in an Existing Volunteer Program

**Nancy A. Gaston, CVA**

## THE PROBLEM

"We've been doing just fine without report cards." That was the response of a Board member and long-time volunteer of a telephone crisis service when the subject of performance evaluation was broached.

The grassroots agency which he served had begun as an all-volunteer project. Affiliated with a strong national program, CONTACT Teleministries USA[1], it features initial training and apprenticeship for the volunteers who handle all telephone calls. It had operated for several years without paid staff. When the need for professional management became evident, an executive director was hired. New recruiting, record-keeping, and support systems were welcomed, but the concept of evaluation was threatening to those who had been operating on their own since the beginning of the organization.

The Board of Directors supported making evaluation part of the program. An *ad hoc* committee was named to work with the new executive to develop a sensitive and gradual process for evaluating volunteer performance. The resulting process can be adapted to other programs, especially those engaging volunteers who provide human services in one-on-one situations, whether by telephone or face to face. The plan involves adding components to the evaluation process in three steps over as many years.

## YEAR ONE: SELF EVALUATION

The first year, a two-page questionnaire was designed and mailed to the one hundred volunteers. One part involved self-evaluation, with each person being asked to rate his or her handling of various kinds and aspects of calls, areas of personal growth, areas in which personal development was needed, and willingness to serve the organization in other capacities. The second part involved evaluation of the agency program—physical facilities, support system, in-service training, and communications.

The cover letter explained that the process was designed to help the organization offer appropriate support, training, facilities, and service opportunities. It was signed by both the chair of the committee and the director, to reflect both the joint authorship and the fact that the process was a cooperative undertaking of volunteers and paid staff. There was a deadline for returning the questionnaire, and respondents were asked to provide their names but confidentiality was promised.

After the deadline, committee members phoned non-respondents. Following the calls, the return rate reached almost 90%. The director then telephoned the remaining nonrespondents, explaining the value of their participation and offering to conduct a telephone interview. One volunteer resigned, saying she had wanted to do so for some time but had felt guilty. The call became an exit interview, followed promptly by a letter of appreciation that included a record of her service. Two other individuals indicated that they had procrastinated about sending in the questionnaire because they felt inadequate as volunteers. Listening, affirmation, and encouragement were offered, and an attempt was made to assess their needs for continuing training and support.

Questionnaire results indicated a need for more in-service training. Almost any imaginable topic was listed by at least one respondent, but a majority cited a need for sessions about repeat callers, substance

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In addition to long and varied service as a volunteer, *Nancy A. Gaston*, CVA, has been Executive Director of CONTACT of Kanawha Valley in Charleston, West Virginia (the program discussed in this article) and of Neighbors In-Deed, a volunteer chore service in Vancouver, Washington. She was Program Manager of the Volunteer Bureau of Clark County, Washington, and is a trained leader in Stephen Ministries, a church program involving lay volunteers in pastoral care. She has provided training in volunteer program management on local, state, and regional levels. She is now Director of Christian Development for a Presbyterian church in Portland, Oregon. Her publications include articles in national church publications and a manual for the directors of volunteer-staffed crisis lines. Nancy became a Certified Volunteer Administrator in 1988.

abuse, and domestic violence. Generally, respondents expressed satisfaction with facilities and procedures, but about 25% observed that the bulletin board was cluttered, making it hard to spot new items quickly. An equal percentage expressed a desire to know more about Board plans and projects. A half dozen responses offered very specific practical suggestions for simplifying forms and reporting procedures. Twenty respondents—about one in five—commented that they would like more prompt and direct feedback about their handling of calls.

Questionnaire results were dealt with in several ways:

- Six in-service training opportunities were offered as compared to four the previous year.
- Procedures were streamlined to incorporate suggestions, and the bulletin board was kept current and organized.
- Practices and procedures that had been poorly understood were clarified in newsletters and in a revision of the procedures manual.
- Newsletter frequency was increased, and a regular column featuring highlights of Board meetings was added.
- Over the next two or three months, the director visited each volunteer during her or his regular shift in the telephone center, beginning with those who seemed from their responses to be insecure, unhappy, or burned out.
- To facilitate more frequent feedback, a postcard system was initiated and prompt, brief notes sent to those who handled difficult situations, gave extra time or made helpful suggestions.

Results of the first year of the evaluation process were encouraging. Intake sheets filled out by workers indicated that calls were being handled more appropriately. Attendance at each in-service training session increased by almost 50% over the previous year, despite the fact that there were two additional sessions. Two or three inactive volunteers became involved again as a result of personal attention to their concerns and needs.

YEAR TWO: PEER EVALUATION

The second year, the Board replaced the *ad hoc* committee with a standing one. A revised questionnaire was mailed and followed up with a new component: peer evaluation.

Volunteers were asked to pair up to critique one another's performance. Volunteers, who ordinarily worked one at a time in the telephone center, arranged to visit the center during the partner's shift. The pair took turns answering calls and assessing one another's responses. Printed forms were provided to guide the process. They included most of the items from the first part of the questionnaire but added such specifics as vocal tone and pace, ratio of time spent listening to time spent talking, and appropriateness of word choice—all elements that are hard to judge about oneself.

Participants were not asked to share the contents of the evaluations with staff or committee. Each volunteer signed a list indicating completion of the process and noted any suggestions for improvement of training, procedures, or policies. Four volunteers had trouble overlapping their schedules with others' and two were on a leave of absence during the process, but all the remaining individuals participated and reported that the procedure was helpful. Some pairs even met another time or two to evaluate progress or continue discussion.

The informal system of selecting partners had a built-in flaw: there was some tendency for persons with like weaknesses to be paired. Volunteers knew best those persons who had been in the same initial training class and who thus reflected any weaknesses of that particular training experience. For example, if their training session on the use of referral materials had been weak, neither partner might recognize lack of efficiency in locating referral information. Allowing free choice of partners, however, enhanced the process by making it less threatening and more enjoyable.

YEAR THREE: AN OBJECTIVE ELEMENT

The initial plan called for an objective evaluation instrument to be introduced in the third year. The committee had considered asking each volunteer to critique a verbatim—a written transcript of a crisis line call—but had some misgivings. Such verbatims are prevalent in the human service professions, but the committee members anticipated considerable resistance from volunteers who excelled at oral communications but detested "writing it down." After streamlining recording procedures in response to volunteer input, it seemed inappropriate to ask for analysis of a written script.

A cassette tape of a simulated crisis call, with questions inserted at intervals, and an accompanying response form had been developed by another crisis agency and offered for sale. Several copies were obtained, and each volunteer was asked to listen to the tape, either signing out a copy to take home or using it at the center. A tape player was provided, and volunteers completed the response form and left it at the center.

Once the form was received from a volunteer, a brief interview was scheduled. A specially trained senior volunteer or staff member met with the individual, and the tape was played again. Responses were discussed, with lively dialogue resulting. Human communication does not always lend itself to objective evaluation. Even when volunteers argued for their "nonstandard responses," however, they had increased awareness of missed verbal clues and misleading answers.

The initial results of this phase of the evaluation process looked very promising. There was no indication that volunteers felt threatened by the procedure. On the contrary, many seemed to relish the challenge of critiquing the simulated call. It should be noted that the questionnaire was repeated a third time, with the intention to use a questionnaire on an annual basis for program and performance evaluation.

## SUMMARY

Although performance evaluation is an essential part of any well-managed volunteer program, it is a part that should be introduced sensitively and carefully into an existing program. Self-evaluation is probably the least threatening way to begin, especially if it is linked to program evaluation so that people see the purpose as growth and development rather than judgment or criticism. Peer evaluation is a logical second step, with a more objective evaluation instrument being introduced only after people have become comfortable with the process.

Introducing volunteer evaluations means that there must be a commitment on the part of those who manage the program to deal with the information generated. If volunteers are asked to provide input but do not perceive that they are heard, then evaluation becomes not just a useless but a negative process.

## APPLICABILITY AND ADAPTABILITY

While the process as outlined is obviously appropriate for a telephone crisis service, it could be adapted for use in almost any program in which volunteers work individually and with little direct supervision to provide personal care: home, hospital or nursing home visitation; chore services; information and referral services; intake interviewing; peer counseling; or befriending programs such as Big Brothers or Big Sisters.

The questionnaire idea can be utilized essentially without adaptation. (Give any questionnaire a trial with three or four persons to eliminate ambiguous or misleading questions.) Do not settle for returns received without prompting and followup, and aim for 100% response.

Peer evaluation can involve listening to one another's calls, quietly sitting in on interviews (with the permission of the interviewee), or going along on visits to clients. Big Brothers or Big Sisters could pair up to take their younger counterparts on a shared outing and be aware of the interactions between the adults and young people for later discussion.

The third step could involve a video tape if the program provides for face-to-face contact. Audio or video tapes with questions right on the tape or signals to shut off the tape and critique at various points can be more effective for use with volunteers than are written transcripts. Tapes, whether audio or video, are probably even more effective when used in small group settings so that discussion can immediately follow the critique. However, some volunteer programs do not lend themselves readily to gathering groups of volunteers.

In designing the program, it is well to keep in mind the Board member's comment about report cards. Change of any kind generally produces some anxiety, but when that proposed change involves evaluation, the anxiety is intensified. Easy does it.

FOOTNOTE

1. CONTACT Teleministries USA, Pouch A, Harrisburg, PA 17105.

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# Catching Moonbeams in a Jar: Evaluation in a University Public Service Program

**Jackie Schmidt-Posner, Ph.D.**

INTRODUCTION

The 1980s brought about renewed discussions of public service as an important part of each American's life. President Reagan urged individual involvement as a way to offset government's role in many social issues, and President Bush recently announced a "Points of Light Initiative," designed to encourage citizen volunteerism. Students are looked to as an important source of volunteer power in these efforts.

Many colleges and universities now offer programs to support student interests in public and community service. In 1985, presidents of more than 120 institutions of higher education formed the Campus Compact as a way to share information among their institutions and advocate student participation. Over 200 college presidents now have joined this national coalition. Though college students have always been involved in volunteer service, a reinvigoration of their efforts is clearly underway, focused not only on providing needed community services, but on enhancing students' academic and personal development at the same time (Milton, 1989).

At Stanford University, for example, available statistics suggest that public or community service is an ever-increasing part of the student's experience. Of the 1988 graduating seniors responding to the Senior Survey, 68% said that they had been involved in some public service. This is almost a 20% increase from the year before. During the 1988-89 academic year approximately 750 students—over 10% of the undergraduate student body—were actively involved in volunteer programs through the Haas Center for Public Service.

The Haas Center for Public Service is a place of diversity and intense activity. Bulletin boards overflow with notices about programs and volunteer opportunities. Students are everywhere—hunkered down on the hall floor painting banners; racing up and down the stairs; waiting in line to use the copier or Macintosh; and working on any available empty surface. One program in the Center operated out of a bookshelf in the hallway for the better part of this year!

Many of the students do good things in their volunteer work. They report their accomplishments and what they've learned:

> *The best part [of a spring break experience related to homelessness in the Bay area] was the evening we played with the kids from the Family Living Center. . . . All they wanted was someone to pay attention to them and love them; they gave the love right back multiplied by 10. Jose, one of the kids, both touched my heart and broke it. I was his "horse" for half an hour before he felt comfortable really talking, but when he did it was the best feeling.*
>
> *Stanford Senior (Political Science major)*

> *The most memorable part of the experience [service project on a Zuni reservation] was listening to a little girl answer the question "Do you know how this mountain was made?" with a story about the gods of the Zuni without a moment's hesitation or flicker of indecision.*
>
> *Stanford Junior (Anthropology major)*

Our own experience working in volunteer programs and the stories people tell us about their experiences are two sources of information about how programs or organizations are doing. However, these sources of information—while compelling—tend to be biased and subjective. If volunteer programs are to develop and improve, more systematic inquiry—evaluation—is necessary. Recognizing the need for more evaluation, a group of Campus Compact members who met at the Wingspread

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Conference Center in Fall 1988 set as one of four priorities for future action the development and improvement of college public service program evaluation.

The Haas Center for Public Service has grappled with evaluation issues for several years. Some evaluation mechanisms work and have provided clarity about the problems and barriers to evaluating our particular type of organization. The intention of this article is to share what we have learned about why evaluation is important, why it's difficult, and to give an overview of the Haas Center's approach to evaluation.

## OVERVIEW OF THE HAAS CENTER

The Haas Center for Public Service (formerly the Stanford University Public Service Center) was founded in 1984. Funded by the University, the Center was conceived by Catherine Milton, its director, as a way to bring together under one roof a variety of community service programs already operating on campus. The expertise and continuity provided by a professional staff coupled with the ideas and enthusiasm of students have resulted in a dynamic, continually-evolving program.

The Center supports a clearinghouse of volunteer opportunities such as tutoring and other school-based programs. These programs give the Stanford students the opportunity to provide one-one-one assistance, student organization assistance, and public service fellowship programs; students also may assist with the annual student-run, issue-focused "You Can Make a Difference" conference. The 1989 conference on environmental issues drew over 2,000 participants. Many of these efforts are supported by grant funds. In addition to the programs directly sponsored by the Center, Stanford University boasts a variety of other very effective community service efforts which have been developed by ethnic student communities, academic departments, and other student organizations.

Trying to capture the amount, nature, and impact of all of this activity is somewhat like trying to catch moonbeams in a jar. Further, budget cutbacks, space restrictions, and other resource limitations mean that evaluation often gets pushed to the bottom of the funding list as an activity.

For the past two and a half years the author worked as an evaluation specialist at the Haas Center. The position is funded as a one-quarter time (10 hours per week) graduate assistantship and was initially underwritten as part of a grant from the Hewlett Foundation. Evaluation now is institutionalized as an essential component of the Haas Center's functioning.

## WHY EVALUATE?

Interviews with staff yield a number of reasons to support evaluation or systematic inquiry.

### *Program intervention*

The most compelling reason to engage in evaluation is to collect information which can be used to make changes or improvements in programs or activities. Carol Weiss (1988) suggests that the information gained from evaluation is used by leaders and decision makers for four purposes: 1) warning signal that something is wrong; 2) guidance for improving policy or programs; 3) stimulus for reconceptualization or reframing of issues or programs; and 4) mobilization of support.

Understanding what volunteers are doing, why they are doing it, how the recipients of service feel about it, and strengths and weaknesses of the experience allow program directors to improve on problem areas and enhance, or maintain, aspects that are working well. For example, a survey of Stanford students involved as tutors in the first year of a project with a local school district asked them about the positive and problematic aspects of their experience. The result of this evaluation effort highlighted the need for better coordination at the school site and more tutor-teacher contact. The data were used to support a successful grant application to develop a system of peer Tutor Coordinators who are responsible for establishing links and building relationships with the teachers and tutors who work at a particular school site. This program innovation has been a key ingredient in building continuity and commitment among teachers, students and the children tutored.

Likewise, a series of structured group discussions with students focused on their motivations for involvement and the nature of their experience in public service. It yielded a new framework for thinking about the Center's programs. Most useful was the distinction between "direct service" activities and "internships with organizations." The discussions suggest that students enter into these two broad types of experience with different motivations. Students who get involved in direct service want to "make a difference" and "help others," while students seek internships to "learn about" or "gain experience in" a particular type of organization or setting. Distinct programmatic supports (*e.g.*, type of training, amount of structure, supervision) are required for each type of service, and, further, we found that involvement in these two types of experiences tends to correspond to stages in students' undergraduate careers (Schmidt-Posner, 1989).

*Building an institutional memory*

A central feature of educational organizations is the transiency of students. On the positive side, this provides a built-in mechanism for new ideas, fresh energy, and change. The problematic aspect is that often when key student leaders leave, they take with them the wisdom accumulated from their experience. Documenting program objectives and implementation strategies and assessing how well they worked builds an institutional memory. The availability of this information allows new leaders to benefit from the experience of their predecessors and provides the continuity that facilitates more informed program decisions.

One of the ways Stanford students are introduced to public service is through a one-day event, Reach Out Today, in which large numbers of students are encouraged to volunteer for several hours on a particular Saturday. The students participate in short-term community projects such as painting a school gym, planning a party for disabled children, or sorting clothes for a battered women's shelter. While the program was successful at creating student interest, participation from agencies began to slack off.

A small evaluation effort involving visits and discussions with key community agencies uncovered problems. Agency staff were devoting scarce time to developing tasks for the students and giving up their own weekend time to supervise the activity, but occasionally the students failed to show up. These discussions with community agency leaders pointed to the need for more conscientious follow-through on the student end and for the development of ways to build student commitment. Because these insights were documented, the next Reach Out Today coordinator was able to focus on how to address these weaknesses, thus making the program stronger for both the students and the agencies.

*Modeling reflective behavior*

The philosophy underlying many college volunteer programs—including Stanford's—is that volunteering is a form of service learning. "Because college is a time for learning and questioning, community involvement experiences are prime opportunities which challenge students' cognitive processes and foster values development" (Delve, Mintz and Stewart, 1987). Professionals working in the area of service learning generally agree on the value of structuring opportunities for students to reflect on their experiences as a way of learning from them. Engaging in reflection about our programs—evaluating them—is a way for professionals to model the behavior we seek to encourage in the students with whom we work.

*Fundraising and public relations support*

Stanford's national prominence in encouraging college student volunteerism (President Donald Kennedy is one of the three founding presidents of Campus Compact) has attracted the attention of journalists who write about this growing movement. Typical questions posed center around the number of students involved in volunteer activity and how this compares with past levels. Foundations and individuals funding programs want to know what difference their money has made. Until the Haas Center began to systematically track student involvement and evaluate programs, providing information to the foundation and media communities involved guessing about numbers and relating anecdotes. Many problems with collecting precise data still exist, and anecdotal data are still appropriate and powerful. However, with the development of tracking systems, the staff now has at its disposal more accurate information to use in communicating to others—both internally and externally— about the Center's progress and activities.

*Enhanced power and credibility for students*

In response to the question about the uses of evaluation, the Center's Volunteer Coordinator, who advises a number of student-run projects, suggested that evaluation and documentation of programs can be a source of power for students. Because they lack both longevity and depth of experience in the organization, students are sometimes at a disadvantage in decision-making situations which affect their programs. However, when student leaders can point to documentation of their programs over time, they can potentially exert more influence in the decision making process.

BARRIERS TO EVALUATION

The results of evaluation or systematic inquiry can clearly be useful to both student or volunteer leaders and program administrators. However, reports from Campus Compact members suggest that little is done in the way of evaluation in many college public service centers or programs. Such efforts are hindered by a number of factors, most of which are not exclusive to college community service programs.

*Inadequate resources*

Volunteer programs seem to be chronically underfunded, and there are always four or five good ideas or worthy causes waiting in the wings to compete for any surplus time, money, or space. Further, the benefits to be garnered from an investment in evaluation are uncertain, probably long-term and may not be tangible. The costs of *not* engaging in systematic inquiry are also not readily apparent so that organizations may have little incentive to use scarce resources for evaluation.

*Diversity and dynamism of programs*

A major difficulty in developing an evaluation system for the Haas Center grows out of the diversity of activities and programs in which students are involved and the decidedly organic evolution of many of them. A few programs, such as the Ravenswood-Stanford [School] Tutoring Project, are fairly straightforward: we know who the Stanford University students in the program are, how much time they volunteer, the training they receive, and the nature of their service. Assessing the impact of the project on the children tutored is an enormously complicated task, but finding out what the tutoring experience is like for the Stanford students is quite achievable.

An important role of the Center, however, is to encourage student ideas and initiative. For example, in 1988 a group of students participated in a four-day spring break service-learning project about homelessness in San Francisco. At the end of the project, some of the student participants wanted to learn more about the issues and educate the Stanford student body about ways to get involved in solutions. The group developed a week-long agenda of activities which culminated in a conference. While the numbers were not overwhelming, the events were successful and the students immediately started planning for a bigger conference which was held a year later. Now the 20–30 students who worked on the 1989 conference have formed a student organization, the Stanford Homelessness Action Coalition (SHAC) to educate the Stanford community and to develop service opportunities working with the homeless. The group has already done some successful fundraising and will work with Habitat for Humanity to build a house in East Palo Alto this September! Because of the evaluator's record of growth and change, he or she can only begin to capture these dynamics.

*Broker role*

One of the functions in the Haas Center is to serve as a broker between opportunity-seeking students and volunteer-seeking community groups. In many cases the Center is simply the conduit through which students connect to people and organizations needing their help. Students themselves look in the Clearinghouse files and at computerized internship listings, leaving with names and phone numbers to call. Finding out what happens to these students has been difficult. Students using this service of the Center do not establish a personal relationship with Center staff who encourage them to stay in contact; thus, they have no particular incentive to report on their successes or the problems they encounter in locating a placement. A variety of follow-up strategies have been tried, but we still know relatively little about the experience of students who make their contributions outside of the structured programs of the Center.

*Students-related factors*

In part because of their youth and in part because they are just passing through the institutions, students often don't think very far ahead. Their energy goes into planning and implementing events and once the event is over, they have little interest in evaluating it. Further, they often lack an understanding of how their program fits into a larger picture and thus can't fully appreciate the importance of evaluation. For students, then, there are no strong incentives pushing them to document and assess the results of their efforts.

## EVALUATION IN THE HAAS CENTER

Despite the problems and barriers to evaluating college volunteer programs, evaluation has become an important component of the Haas Center for Public Service. The only funds directly allocated to Center-wide evaluation are for a quarter-time graduate student assistantship. Two and a half years of developing evaluation mechanisms and approaches that work in our setting have suggested three basic elements to consider in planning evaluations. These elements are offered to those interested in encouraging more systematic inquiry in their organizations. Because much good literature on the basic components of evaluation (*e.g.*, defining the objectives, data collection strategies, etc.) is available, those principles are not discussed here.

*Start modestly*

We began by developing systems to simply count and track students who were involved in programs. Over time this descriptive, quantitative data can reveal trends and changes in student participation. Setting up systems and reporting formats for participation data takes time, but once a system is in place, data collection is more easily accomplished. Without the most basic data concerning how many and which students are involved in various activities, finding out how their experiences can be improved is impossible.

In the Center two kinds of data about participation are now routinely collected. Organizers of all events sponsored or co-sponsored through the Center complete an "Events Evaluation Form." This form is designed not only to collect data about the costs and number of people who attended but also to serve as a mechanism for event organizers to evaluate the publicity, room arrangements, speakers, and so on. These forms are kept in a notebook in the central office and serve as a repository of accumulated wisdom about events.

A more challenging task has been to develop ways to capture the extent of student involvement. Some students are involved in ongoing volunteer programs such as tutoring, while others are intensely involved for a more concentrated period, perhaps working on a conference. Still others may participate for just one afternoon in a Reach Out Today project. During the 1988–89 academic year we have experimented with using three categories of student involvement: 1) involvement in one-time events, 2) ongoing direct service to the community (such as tutoring or adopt-a-grandparent programs), and 3) ongoing leadership of student programs (conference organizers, officers and directors of student organizations, Clearinghouse peer advisors, etc.). On a quarterly basis program directors estimate the number of hours contributed by participants in their programs. At the end of the 1988–89 year students had contributed an estimated 60,000 hours of service in programs sponsored by the Center.

*Document program implementation*

Simply documenting various aspects of program planning and implementation helps to build an institutional memory. What is learned in the early phases of a program can be useful in making improvements for future efforts. Documentation ". . . can benefit both project participants, who are enabled to make reflective decisions about program modification, and potential adopters, who can review the 'record' and adopt components, processes, and roles for . . . replication" (Clark, 1988, pp. 21–22). Documentation has been particularly useful in providing continuity for student organizations in which the leadership changes annually. Further, documenting program implementation—that is, keeping files and making notes about decisions, costs, people contacted, etc.—is a task that is straightforward and fairly easy for students to do.

*Internalize evaluation in the organization*

The evaluation specialist in the Center was to be a part of the staff and to assist student leaders and program directors in evaluating their programs. This ongoing involvement in the Center facilitated the development of relationships with student leaders and professional staff, thus reducing the resistance and anxiety which the prospect of evaluation sometimes triggers. Further, ongoing participation in the organization allowed Evaluation Staff to understand the complex dynamics affecting various programs.

From time to time Evaluation Staff was directly involved in designing and conducting an evaluation. More often, however, her role was to work with others in the Center, helping them to think about how and why they might evaluate their programs, and to offer technical assistance in the design of surveys or other data-collection mechanisms. An important part of the job was to educate and enable others to build evaluation into their programs. Students involved in program development in the Center learn from the opportunity to wrestle with questions of what and how and why to evaluate.

Michael Patton (1988) argues that evaluation and program implementation need not be independent activities. "Indeed, such independence and separation is one of the things that drives up the cost of evaluation" (p. 85). Thus, teaching students and staff members to integrate evaluation with their program planning is a cost-effective strategy for volunteer programs and is likely to increase the extent to which evaluation results get utilized. Spreading out the responsibility for evaluation means that more gets done and that systematic inquiry becomes more widely institutionalized in the organization.

## CHALLENGES FOR THE FUTURE

As systematic data collection efforts and evaluation of programs have become more integrated into the Center's functioning, two new challenges arise. "The body counts are easy," one staff member is fond of saying, when compared with the task of analyzing the *impact* of programs on the community or client group served, or the quality of the volunteer experience for students. Our student focus group discussions are the first step in a much longer process of understanding what students need in order to effectively learn from their experiences. It is only after we determine the characteristics of quality volunteer or internship experiences that we can develop ways to assess that quality more broadly.

The second challenge facing the Haas Center is the development of an internal process for making decisions about evaluation priorities. It is not possible nor is it necessary to evaluate all programs each year. While responsibility for a basic level of program documentation can be dispersed throughout the organization, resources are limited for conducting more formal or extensive program evaluations. Designing and implementing surveys or interviews cost time and money. A mechanism for identifying and prioritizing evaluation needs in the Center would rationalize the process of deciding where to allocate scarce evaluation resources. In a dynamic organization, where innovation and responsiveness are part of its vitality, such rational processes are not easily installed.

Ultimately the objective of evaluation is to capture and feed back to the organization information about its work in a way which allows that information to be used for program improvement. According to Haas Center director Catherine Milton: "Though evaluation results have been invaluable in fundraising and public relations efforts, by far the most important reason to do evaluation is to make our programs better."


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# Integrating Organizational Programs with Community Improvement Issues

**Michael J. Havercamp**

INTRODUCTION

In what ways can nonprofit organizations make difficult choices as to which programs are worthy of attention? This article will address this question by presenting a participatory planning process that will enable organizational leaders[1] to successfully match their programs to community issues. There are many organizations which skillfully and competently succeed in providing critical community programs such as health care for the indigent or training for teaching literacy skills. However, for existing organizations searching for a process to better integrate programs with community needs or for those people considering the establishment of a new organization, this article is of significance. This discussion will include: (a) a rationale for the process, (b) understanding the community character, (c) how to match organizational programs to community issues, and (d) facilitating the process.

*Rationale for the Process*

This process is based on two assumptions. First, programs of many nonprofit organizations focus on meeting community problems such as substance abuse, neighborhood deterioration, unemployment, illiteracy, and peace and justice. Although most organizations may start with this focus, sometimes community improvement, or service, is de-emphasized as organizations develop and leaders become more concerned with their organizations' survival. For example, leaders can become predominately concerned with issues such as employee satisfaction or salary adjustments and less concerned with the community issues their organizations were often created to resolve.

A second assumption of this process argues that volunteers should be directly involved in decisions about organizations' programs and services. Satisfying such volunteer-felt needs as having decision making power is important to triggering the motivation lever of many volunteers. Many recognize the importance of the particular experiences and skills that volunteers bring to nonprofit organizations. In addition, Pinder (1985) suggests that a considerable amount of voluntary work can be attributed to power motives (p. 46).

*Step 1. Understanding the Community Character*

How can organizational staff and their volunteers better understand the character of their community or confirm their understanding of the community for which they provide programs? For this understanding to occur, a community study could be implemented and should include such topics as population characteristics and research/study questions. Before the study begins, the organization must also determine methods and sources of information and how to involve volunteers in the community study.

*Population Characteristics*

A community study should be conducted as though it were a physical exam of a person, uncovering as much about this community body as possible. Understanding the character of its people—history, customs, recreation patterns, political arrangements, and other socioeconomic and cultural characteristics—is important.

These population characteristics must be understood in terms of changes and trends without limiting the community study at first. Time spent will be very valuable in the long term. What the community

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residents consider are the human and community problems, concerns, and ideas for change must be determined. These particular ideas and perceptions will help the organizational leadership to determine community improvement issues.

Understanding the individuals who are the influential leaders can benefit the organization in many ways. For example, when planning a fund-raising campaign for a substance abuse center, it is strategic to know the influential leaders in the community so the campaign will be a success. Influentials are often respected by other community members for their opinions. They form viable communication networks among members in a community (Rogers and Kincaid, 1981). These networks, *via* influentials, can generate a positive message encouraging community members to contribute to possible fund-raising campaigns.

It's also important to understand how people in the community make money to live and to know with which organizations one's own organization associates or could associate in the future. Information about organizational associations will help in assessing present and future collaborative networking options when considering strategies for implementing new programs. How technology is changing a community's way of life and the strengths and weaknesses of local government and the legal systems should also be included in the community study. Finally, and very importantly, learning where people volunteer and the characteristics and perceptions these individuals have relative to community needs will lead us to potential sources of volunteers who will respond to the needs of a variety of community problems.

*Research Questions*

What is a process for identifying research questions for the community study? When creating questions for the community study, list the many questions the organization would like to have answered. Attempt to make the creation of these questions a learning and enjoyable experience. For example, Nevada Cooperative Extension conducted a community study in the Stateline area (near Lake Tahoe). As an initial step, through a group brainstorming method, Extension agents developed a list of all the questions they would like to have answered concerning the Stateline community. These questions were related to achieving a better understanding of the people and their local community character. Specific questions addressed the number of single-parent families, unemployment, household income, and perceptions of community leaders about community problems.

Once an agreed upon list of questions has been determined, establish a working team which will take responsibility for making sure the information is gathered and evaluated. In the Stateline example, Extension agents formed working teams who answered questions for the community study.

*Sources and Methods of Information*

What are the sources and methods of gathering information for answering questions for the community study? A community study should include at least two major sources of information. Public documents such as census records and newspapers are good sources to begin with. Secondly, documenting the perceptions held by community people about the study questions is critical.

Specific methods of gathering information from community members include a formal written survey (*e.g.*, Delphi technique), nominal groups, focus groups, task groups, advisory groups, community forums and key informants[2]. To illustrate how two of these methods could be used together, fifteen people with a similar interest were recently brought together as a task group in Battle Mountain, Nevada. This group, representative of the community social and economic character, was asked specific open-ended questions about the benefits of implementing a community-development project. The members' perceived benefits were rank-ordered using a modified nominal-group process. In order to know if their ideas (benefits) were "representative" of their community, a written questionnaire is being mailed to a large sample of community members. Summary data from the questionnaire will be used by the task group which will attempt to make a meaningful decision about the community-development project.

During the past twenty years, many improvements in information-gathering have been made. For example, Michael (1987, p. 37), provides a very good description of a process for using an improved nominal-group process which includes: (a) silent generation of ideas in writing, (b) round-robin recording of ideas, (c) serial discussion of the list of ideas, and (d) voting. This approach could be especially useful to organizational leaders who are having difficulty soliciting the ideas of every person in a group about a topic, such as a community need.

### *Involving Volunteers in the Community Study*

How can volunteers become involved in the community study? They can participate with organizational staff in its design and implementation. For example, a group of farm families and their parish pastor in Michigan defined and made decisions about many of the questions to be answered in a study conducted there (Havercamp, 1985 and 1988). They accomplished this task in a relaxed atmosphere at a dining room table with refreshments. Their participation also helped to create a sense of teamwork among the farm families and the parish pastor, allowing them to increase their feeling of power or control over the planning process. The collaboration among the farm families and the parish pastor, which began seven years ago, continues today. These initial planning and decision making efforts have resulted in the formation of three community organizations: Choices (an educational nonprofit organization), Choices Producers Cooperative (a food marketing cooperative), and Foods (a buyer/consumers' cooperative). The United States Catholic Conference Campaign for Human Development, which helped to fund the work of the farmers, recently chronicled the efforts of this group and three other groups in a videotape entitled, "Building Partnerships: An Experience of Faith" (Campaign for Human Development, United States Catholic Conference, 1988).

Volunteer participation will help to create a process leading to "volunteer ownership." After initial discussions, new volunteers will learn about organizational programs and determine if their participation in the organization, in their view, will improve the community. Secondly, they will determine subconsciously if their participation will satisfy their own developmental needs. These needs, according to Glasser (1985, p. 3) include: (a) to survive and reproduce, (b) to belong and love, (c) to gain power, (d) to be free, and (e) to have fun.

The organization must consider these needs and focus on these needs as study topics so that volunteer participation will increase. This was demonstrated in a project from which was formed a new community organization in Saginaw, Michigan. During two years with Saginaw United Neighborhoods Association, observations indicated that volunteers tended to perform leadership roles when they felt their participation would result in *solving* a community problem that they considered to be specific, immediate, and realizable (Alinsky, 1971). Specifically, volunteers, regardless of their roles, must view their participation as rewarding to themselves.[3]

Involving volunteers also provides the organization with the opportunity to benefit from different areas of expertise, often for free. Volunteers, as well, are often more knowledgeable and skillful in a program area than paid persons in an organization.

### *Step 2: Matching Organizational Programs to Community Improvement Issues*

How can organizations match organizational programs to community improvement issues? When completed, a community study should have identified a set of community issues or problems with which an organization could be particularly concerned. These problems or concerns may include the need for literacy education, personal enrichment, placement of battered women in employment or housing, substance abuse, economic development, or farm and ranch survival, or any one of many other problems. While many organizations can't easily change their program focus (due to its original mission, personnel changes, new equipment, and so on), the findings from this community study could serve to help organizational leaders evaluate if they should change their program focus and, therefore, assess the feasibility of plans for change.

The organization must determine what issue or set of issues is relevant to its organization. This is where the match should exist! Are the community needs which require immediate attention compatible with the mission program or focus of the organization? Returning to the Saginaw experience, this match existed when leaders of Saginaw United Neighborhoods Association agreed to organize neighborhood groups (a program focus) in order to address housing issues. This decision was a result of a participatory planning process which included a community study: gathering demographic data (*e.g.*, housing ownership characteristics of a given neighborhood), getting individual perceptions of some neighborhood residents about neighborhood issues, and bringing neighborhood residents together to agree on priority issues. In this situation, improving neighborhood housing was the agreed upon priority issue.

Attempting to determine how organizational programs can be linked with community improvement issues requires an understanding of issues central to the organization as well and could require an organizational development study. Fox (1987, pp. 43–101) provides an excellent resource for designing a participatory planning process for addressing organizational development issues. He provides the following step-by-step guide to group problem solving: (a) premeeting idea generation and preparation, (b) in-meeting idea generation and refinement, (c) guiding the discussion phase effectively, (d) voting procedures for authentic results, (e) the document review meeting, (f) program planning and other multiple group situations, and (g) putting it all together.

Once this match is determined, specific strategies should be formulated which will allow for addressing community issues and the fulfillment of an organizational program focus.

### *Educational, Organizational, and Community Action Strategies*

Why are educational, organizational, and community action strategies necessary? Conceptually, a successful planning process for linking organizational programs to community issues would include strategies for learning, organizational change, and community development actions. These strategies must take into account what is "winnable" or achievable, always working toward the increased responsibility of volunteers in the planning and implementation of this planning effort.

In this context, *educational* refers to unlearning and new learning. The learning issues could relate to new knowledge, skills, and sensitivities about the organization, about self, about others, about relevant programs, and about the local community character in general.[4] Similar to a community study, volunteers should be encouraged to help design and implement educational strategies. Returning to the Michigan farm-family project, farm members determined they needed to develop new knowledge and skills for reducing the input of synthetic chemicals in growing corn in order to produce healthy feed for the cattle. For many years, some farmers used specific pesticides and chemical fertilizers and thought that they needed to "unlearn" chemical production practices and learn new production practices. These conclusions were established after the farmers completed a community study supporting this synthetic chemical reduction goal. Therefore, farm members attended workshops, read publications, and established a "biological" group where new knowledge was shared and new skills were learned. In 1989, some of these farmers incorporated new farming practices which are based, in part, on the new knowledge gained and the skills learned from these educational experiences.

Another type of strategy which may be necessary in order to successfully integrate organizational programs with community issues could involve *organizational* plans (strategies). Issues such as staff readiness to change, workload, competencies, and resource allocations may require priority focus by an organization's leaders.[5]

In the farm-family project, farmers identified specific organizational issues related to marketing, financial, and decision making which needed to be addressed in order to establish a new nonprofit organization. Marketing tasks included determining: (a) sales goals (yearly, long term), (b) pricing and quality standards, (c) inventory needs,

(d) transportation needs, (e) advertising plans, and so on. Financial tasks included assessing: (a) cost estimates for products and services, (b) need for start-up money, (c) cash-flow needs, (d) membership dues and other fund-raising efforts, and so on. Decision-making group tasks included determining: (a) characteristics of the policy group governing a new organization, (b) decision-making style (*e.g.*, consensus vs. majority vote), (c) standards for officers, (d) responsibilities of members, and so on.

Strategies for *community action* may also be necessary as organizational leaders attempt to integrate organizational programs with community issues. To illustrate this point, Saginaw neighborhood residents organized public meetings related to requiring demolition or rehabilitation of specifically identified houses. As a result of these volunteer-controlled meetings involving up to 200 people, a selection of resolutions was affirmatively acted upon by the Saginaw City Council. These resolutions called for the demolition and/or rehabilitation of certain houses as well as new housing and building code changes.

### *Step 3: Facilitating the Process*

Who should facilitate the process for matching organizational programs to community improvement issues? In order to assure that Step 2 is accomplished, an individual or team should coordinate the planning process. A staff member, paid or volunteer, from the organization involved should act a facilitator and be responsible for coordination. Criteria for selecting a person or team facilitator should include: commitment to this process, ability to listen and communicate with others, and skills in group problem-solving. In addition, a facilitator should possess an understanding of organizational development, community development processes, and value volunteers to be directly involved with decision making.[6]

A facilitator is a coach, helper, guider, prober, and supporter. Effectively performing these functions is particularly important to volunteers' participation in this planning process. For example, volunteers must have opportunities to meet developmental needs such as power. If a facilitator has an autocratic decision-making style (telling others what to do) and is not receptive to others' opinions, volunteer involvement will be limited at best. The facilitator, sensitive to various volunteer needs, must be patient, allowing volunteers opportunities to increase their decision-making control and to assume responsibility for their actions. A facilitator coach, when working with others, must attempt to be authentic (minimize conflicting messages); avoid bluffs and threats; avoid sarcasm and nagging; and must be his/her own best example to others (DeVille, 1984).

For facilitation to be effective, a process for matching organizational purposes to community improvement issues must consider the importance of "taking time." The specific elements of the process, therefore, should not be overly structured in order to avoid possibly restricting the natural development of volunteer participation and flow of information. In essence, the facilitator(s) will play a most important role in linking the organization with the community.

## SUMMARY

In this article, a participatory planning process was discussed which could help nonprofit organizations make difficult choices when they attempt to link organizational programs to community improvement issues. This process included a discussion of: (a) understanding the community character, (b) matching organizational programs to community issues, and (c) facilitating the process.

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## FOOTNOTES

1. A leader potentially could be any member of an organization (paid and unpaid, such as volunteers) who could be involved in the problem-solving and decision-making process of an organization. Depending on the nature of an organization and its process for decision making, this may include persons in traditionally formal leadership roles (*e.g.*, Director) as well as less-formal roles (*e.g.*, receptionist).
2. For information about surveys, the Delphi technique, nominal group process, focus groups, task groups, advisory

groups, community forums and key informants, see, for example: Butler, n.d.; Krueger, 1988; Moore, 1987; *Keys to community involvement*, n.d.; and Witkin, 1984.

3. For information on recruitment strategies for volunteers, see, for example: "Volunteerism—Managing programs," 1988; MacBride, 1982; and Haines, 1977.
4. For a discussion of learning concepts, see, for example: Brookfield, 1986; Elias and Meriam, 1980; Houle, 1972; and Knowles, 1970.
5. For a discussion of organizational development topics, see, for example: Argyris and Schon, 1978; Bradford, 1978; Deutsch, 1973; Francis and Young, 1979; and Lippitt and Lippitt, 1978.
6. For a discussion related to community development topics, see, for example: Jensen, 1980; Michael, 1978; Roberts, 1979; and Zaltman and Duncan, 1977.

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