Volunteer Screening Practices, an Essential Component of Volunteer Management: Implications from a National Study of Extension Professionals

Cathy M. Sutphin, Virginia Tech, Blacksburg, VA

INTRODUCTION

I have often envied the fact that my farmer husband can readily see the work that he has accomplished during the course of the day and over a period of time. In volunteer leadership, it is difficult to gauge the effectiveness of our work especially when providing statewide leadership to a large, complex volunteer program. It is similar to evaluating a farmer's work by looking at an aerial map of the farm: you can see the big changes but the smaller more subtle changes are hard to detect. Ongoing research is needed to assess the situation, identify needs, and monitor trends in volunteer development.

Given that volunteers are a critical resource for not-for-profit organizations, skilled management is required to interest and retain them, and to provide for the safe and effective involvement of our clientele (McCurley & Lynch, 1996). It is imperative that we continually strive to understand and incorporate the use of best management practices in volunteer leadership.

Over the past decade, volunteer leadership literature has consistently promoted the use of best management practices when engaging volunteers (Campbell & Ellis, 1995; McCurley & Lynch, 1996; Vineyard, 1996). Severs, Graham, Gamon and Conklin (1997) explain that the incorporation of best management practices is the foundation of an effective volunteer management system. In addition, there has been a repeated need to conduct research in this area (Ellis, 1985; Fisher & Cole, 1993; McCurley, 1994). Yet, as we examine our organizations, can we also document the progress made?

Increasing responsibilities have been assigned to volunteers and the paid staff who work with them. As we have increased the duties of volunteers who work with vulnerable clientele, we have also increased our organizational responsibility to provide effective volunteer screening and management. Those in volunteer leadership must develop systems to support the work of our volunteers (Vineyard, 1996). Now, more than ever, we must create meaningful volunteer roles based upon local programming needs. Since volunteers partner with paid personnel, their contributions should be recognized, and volunteer directors should remain current with national trends in volunteer development. As volunteer administrators, we should periodically examine our organization to ensure that we are both engaging volunteers at every level and using commonly recognized management practices.

METHODS

The purpose of this study was to assess the volunteer management practices of Cooperative Extension across the country. Results provide an organizational picture of volunteer screening, management, and involvement practices nationally. The 26-item survey was reviewed by a panel of experts and piloted with local-level volunteer administrators. The instrument was placed online and an electronic letter along with the URL was sent to 52 State and Tribal Extension Directors with a request that the person in their system giving direction and leadership to volunteer development complete the survey online. Two weeks later a hard copy of the original letter and a reminder were mailed to states that had not responded to the online questionnaire. Forty-one responses were received for a response rate of 79%.

SUMMARY OF RESULTS
Volunteer Involvement

Respondents were asked whether or not their system engaged volunteers in a variety of roles including conducting clerical and/or manual work, identifying educational programming issues or needs, planning educational programs, delivering educational programs, supervising other volunteers, evaluating educational programs, and marketing extension and/or extension programs. The survey revealed that Extension involves volunteers throughout the educational programming process. In the areas of clerical/manual work, identifying programming needs, planning and delivering educational programs, at least 95% responded that they engaged volunteers. However, findings indicated that there are three areas which present opportunities for increased volunteer involvement. Responses from 17.1% of the states indicated that they did not involve volunteers in the supervision of other volunteers. In addition, 9.8% indicated that they do not involve volunteers in the evaluation of educational programs. Lastly, 15% said that they do not engage volunteers in the marketing of Extension programs.

Volunteer Screening and Management

When asked if their organization had established criteria for screening potential volunteers prior to placement, 90% of those responding said they had. However, 29% (12 respondents) indicated they only used the criteria when screening potential youth development volunteers. The remaining 10% responded that their organization did not currently have established criteria for screening potential volunteers prior to placement.

When asked if the screening process was different depending upon the volunteer role, 12 (29%) responded that the process did not differ in relation to volunteer role. Twenty-seven responded that the process in their organization did differ based upon volunteer role. Twenty respondents (49%) said that the major difference in the screening process was that potential youth development volunteers were subjected to a more thorough screening process that included reference checks, inter-

views, and in some cases background checks.

State volunteer administrators were then asked to what extent their staff employed 15 different screening and management practices. The results are summarized in Table 1 in descending order from practices incorporated most often to those used least often.

TABLE 1

Descriptive Statistics:
To what extent do Extension professionals in your state employ each listed screening and management practice?

1 = never, 2 = seldom, 3 = occasionally, 4 = most of the time, and 5 = all of the time

	N	Mean	Std. Deviation
Provide volunteer recognition	39	4.54	.682
Enroll volunteers	39	4.38	.782
Provide training opportunities	41	4.17	.863
Interview potential volunteers	41	3.76	.969
Conduct reference checks	41	3.66	1.196
Use position descriptions	41	3.49	.810
Promote volunteers to new roles	40	3.35	.802
Use MOUs	41	3.05	1.264
Conduct state criminal checks	41	2.93	1.555
Review volunteer performance	41	2.85	.989
Disengage ineffective volunteers	41	2.76	.860
Conduct local criminal checks	39	2.33	1.108
Conduct exit interviews	40	2.22	.832
Conduct motor vehicle checks	41	2.12	1.288
Conduct federal criminal checks	39	1.64	1.013

Results indicate that Extension staff use nonintrusive screening tools more often than intrusive tools (Table 1). Screening tools used most often include the use of position descriptions (mean = 3.49), conducting reference checks on potential volunteers (mean = 3.66), and interviewing potential volunteers (mean = 3.76). It is interesting to note, however, that the means for all questions pertaining to what extent screening tools were used ranged from 1 = never to 3 = occasionally. Additionally, more intrusive screening tools

were used less often. Respondents indicated that they seldom or never used local (mean = 2.33), state (mean = 2.93), or federal criminal background checks (mean = 1.64). Respondents also said that they seldom (mean = 2.12) conduct motor vehicle checks to assess driving records.

In terms of volunteer management practices, respondents indicate that they enroll volunteers most of the time (mean = 4.38) as well as provide training opportunities (mean = 4.17), and recognition for volunteer contributions (mean = 4.54). However, when asked to what extent they used a written position description (mean = 3.49) or a memorandum of understanding (mean = 3.05) when involving volunteers, respondents indicated that they seldom do so. Further, they seldom (mean = 3.35) promote volunteers to new roles. Lastly, results indicate that Extension professionals seldom or never review volunteer performance (mean = 2.85), disengage ineffective volunteers (mean = 2.76), or conduct exit interviews (mean = 2.22) with volunteers as they leave the organization.

Implications for Extension

The volunteer development models most recognized by Extension professionals are the ISOTURE (Boyce, 1971) and the LOOP (Penrod, 1991) models. Both models incorporate volunteer selection, orientation, training, recognition, and evaluation of volunteers as important volunteer management practices. This study highlights the need for Extension, as well as other organizations, to evaluate current volunteer involvement and management practices and to make changes accordingly.

Results of this study reveal that, nationally, Extension emphasizes the use of nonintrusive screening tools, such as conducting reference checks, and interviewing potential volunteers. This mirrors the results of a study of several youth organizations conducted by Schmiesing and Henderson (2001). Each organization must decide when enough is enough and to what degree that these practices enable the volunteer director to effectively screen potential volunteers. The challenge, as described by Graff (1999), is to select the right combina-

tion of screening tools based upon the position requirements that generate sound placement decisions. State-level volunteer administrators must keep their fingers on the pulse in deciding to what extent their organization is implementing an effective screening process.

There are both advantages and limitations associated with every screening tool. Volunteer administrators, therefore, must select a set they feel is most appropriate not only for the position but for the organization as well (Graff, 1999). However, volunteer administrators at the local level and the volunteers themselves may consider tools normally considered to be nonintrusive, such as reference checks, to actually be intrusive. Thus, they may choose to incorporate lower-level tools such as the use of an application. This implies that, in any organization, top level volunteer administrators should consider conducting routine organizational studies. The results would help to establish benchmark data concerning the use of various screening tools, and offer a means of monitoring organizational trends and staff development needs.

Given that respondents to this study report that their staff incorporate the use of screening tools in a range from never to occasionally, Extension should actively educate volunteer development professionals concerning the need to properly screen potential volunteers. In addition, each state should develop an acceptable screening process and monitor implementation of the process. Effective screening can reduce risk in several ways including the identification of individuals who may not have the necessary skills, thus preventing the placement of those who may do harm, and allowing the best person for the job to be selected (Patterson, 1998).

This study indicates that Extension professionals engage volunteers throughout the Extension educational programming process and that they enroll, offer training opportunities, and recognize volunteers most of the time. Areas in which there are opportunities for growth in volunteer involvement include higher-level roles such as the marketing of educational programs and the supervision of other volunteers.

Implications for Volunteer Administrators

Even though volunteer administrators at the state level sometimes believe that there is an overemphasis on best management practices in training and research, this study highlights the need for the training and evaluation of the use of these practices. The study indicates that Extension should increase the use of best management practices by developing and using written volunteer position descriptions, promoting volunteers to new roles, using a Memorandum of Understanding (MOU) with community partners, reviewing volunteer performance, disengaging ineffective volunteers, and conducting exit interviews. In speaking with professionals from other organizations, it appears that these are common areas of concern among managers of volunteers. By increasing the use of best management practices, those providing leadership for volunteers will gain confidence in their skills and will therefore be more likely to place volunteers in more meaningful roles within the organization. Given turnover rates, both paid and volunteer, within nonprofit organizations, it is imperative that the volunteer administrator reinforce these concepts and practices on an ongoing basis.

Volunteer administrators should become more deliberate in developing a process for volunteer evaluation. This process begins with the development and use of written position descriptions. By conducting volunteer evaluations, we can help each volunteer reach their potential while assisting the organization in more effective volunteer engagement (McCurley & Lynch, 1996). Further, volunteers want to know if they are doing a good job and if there are areas in which they can improve. If feedback is not provided, the volunteer will lose respect for the supervisor and the organization (Lee & Catagnus, 1999).

FURTHER RESEARCH

This study raises the need for further research in several areas:

1. A discussion point concerning this study is the extent to which a state-level volunteer administrator has knowledge of local volunteer development within their organization. This suggests that top level volunteer administrators in similar organizations should be studied to gain a better understanding of their roles, responsibilities, and the impact that they have on others within their respective organizations.

2. Research should be conducted to compare volunteer involvement, screening, and management practices in Extension to those of other volunteer organizations. Such research could help volunteer administrators answer the question, "In terms of screening, when is enough really enough?" Further, such research would provide a more realistic view of various volunteer roles and levels of volunteer involvement.

3. Each state Extension organization should conduct similar in-state studies in order to assess training needs, establish benchmark data, and create a picture of the community standard of care for their respective state.

4. Additional research is needed involving successful volunteer administrators across organizations. The resulting information would be valuable to other volunteer organizations as well as people in volunteer leadership roles.

5. Research should be conducted to analyze volunteer administrator motivations involved in engaging volunteers in increasingly more meaningful work.

6. Further research is needed concerning the perceptions that volunteers, potential volunteers, and volunteer administrators at various levels within organizations have concerning the use of various screening tools. Results would be beneficial to volunteer administrators in selecting the most effective screening process.

FINAL THOUGHTS

It is our duty as volunteer administrators to challenge current thoughts and practices and to conduct additional research contributing to the field of knowledge. Given the research that has been conducted over the past 25 years, we can spot the big changes that have occurred. Hopefully, as we continue to plow the fields of volunteer engagement, we can apply current research to improve practices that will not only benefit our orga-

nizations but will ultimately benefit the communities in which we work.

REFERENCES

Boyce, M. (1971). *A Systems approach to leadership development*. Washington, D.C.: United States Department of Agriculture, Cooperative Extension Service – 4-H.

Campbell, K., & Ellis, S. (1995). *The (HELP!) I-don't-have-enough-time guide to volunteer management*. Philadelphia, PA: Energize, Inc.

Ellis, S.J. (1985). Research on volunteerism...what needs to be done. *Journal of Voluntary Action Research, 14*(2-3), 11-14.

Fisher, J.C., & Cole, K.M. (1993). *Leadership and management of volunteer programs: A guide for volunteer administrators*. San Francisco, CA: Jossey-Bass Publishers.

Graff, L. (1999). *Beyond police checks: The definitive volunteer and employee screening guidebook*. Dundas, Ontario, Canada: Graff and Associates.

Lee, J., & Catagnus, J. (1999). *What we learned (the hard way) about supervising volunteers*. Philadelphia, PA: Energize, Inc.

McCurley, S., (1994). Recruiting and retaining volunteers. In R. D. Herman and Associates (Eds.) *The Jossey-Bass handbook of nonprofit leadership and management* (pp. 511-534). San Francisco, CA: Jossey-Bass Publishers.

McCurley, S., & Lynch, R. (1996). *Volunteer management: Mobilizing all of the resources of the community*. Downers Grove, IL: Heritage Arts Publishing.

Patterson, J. (1998). *Staff screening tool kit: Building a strong foundation through careful staffing, 2nd edition*. Washington, DC: Nonprofit Risk Management Center.

Penrod, K. (1991) Leadership involving volunteers. [Electronic version] *Journal of Extension, 29* (4). Retrieved February 24, 2004, from http://www.joe.org/joe/2001february/a2.html

Schmiesing, R.J., & Henderson, J. (2001). Identification of volunteer screening practices for selected Ohio youth organizations. [Electronic version] *Journal of Extension, 39* (1). Retrieved February 24, 2004, from http://www.joe.org/joe/1991winter/a2.html

Seevers, B., Graham, D., Gamon, J., & Conklin, N. (1997). *Education through Cooperative Extension*. Albany, NY: Delmar Publishers.

Vineyard, S. (1996). *New competencies for volunteer administrators*. Downers Grove, IL: Heritage Arts Publishing.