TRAINING BUSY STAFF TO SUCCEED WITH VOLUNTEERS

Building Commitment and Competence in Staff/Volunteer Teams

by Betty B. Stallings
BUILDING BETTER SKILLS

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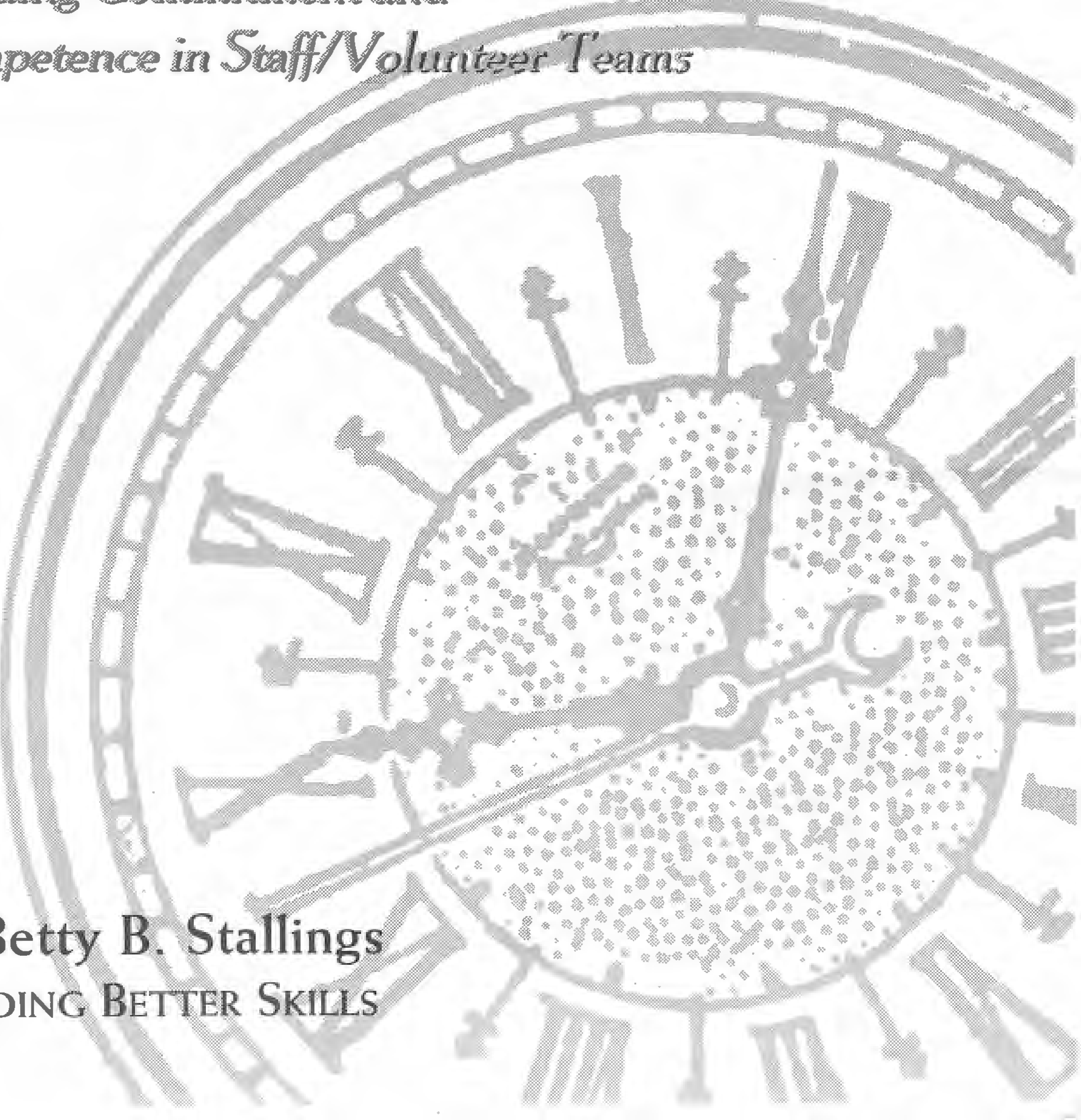

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The Author:

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Other Books/Resources by the Author:

Getting to Yes in Fundraising (1991)
The Resource Kit for Managers of Volunteers (1992)
Volunteer Program Assessment Guide (1995)
The 55 Minute Training Series (10 Modules) (1996)

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In Appreciation...

To the hundreds of participants in my workshops who told me repeatedly that the heart of their volunteer program success depended on full staff commitment and competence in utilizing volunteers. For years, I merely shared your concern. But ever so persuasively, you convinced me to design practical, flexible tools to address these issues. I listened, resisted, listened again and finally set out on the challenging task to create generic tools that could be adapted and useful to the breadth of people involved in working with volunteers. You nudged me, supported me and celebrated with me as they finally became a reality.

To the Volunteer Center Directors of Pennsylvania who were excited about the potential of this book and training modules and who devoted time to field test them with the agencies they serve. Their honest critique and enthusiastic response and endorsement were the energizers that kept me focused and excited - despite many moments of "Will it ever be done?" This partnership would never have occurred without the vision, persistence and impeccable leadership of **Louise Elkins, Associate Director, Volunteer Center of United Way of Southeastern Pennsylvania.** I thank her for sharing encouragement and support at the concept stage and for arranging for the Penn Serve Grant to support the training of the Volunteer Center Directors of Pennsylvania who participated in the project: Judith Curley, Joan Robinson, Sandra Hafer, Bonnie Dunlap, Mary Mackie, Nancy Clark, Lynn Rockwell, Deborah Peterson and Samial Smith Pennings.

To busy staff working in programs supported by volunteers. You have graciously shared the concerns and pressures of your work with me. This has helped me to see the need to capture the essence of the skills it takes to effectively team with volunteers - thus the birth of the 55 Minute Training Series.

To Helen Robinson, colleague and dear friend, whose patience and expertise at formatting, layout and editing kept me sane, hopeful and in good humor during this challenging journey.

To my husband, Charles, who once again lived through my long erratic hours, mood swings, and very messy office!! His great assistance with computer issues and his superb critique, creative ideas and support were invaluable. Without him, this idea would never have become a reality.

To all of those mentioned above and to my family, friends and colleagues who were my cheering section, I want to express my deepest appreciation!

DEDICATION

It is with deep love and appreciation that I dedicate this book to my Mom and Dad, Ruth and Brooke Bright, whose generous spirits touched so many lives through their countless gifts of volunteering.

TABLE OF CONTENTS

Training Busy Staff to Succeed with Volunteers

Introduction

It has been said that you write a book when you can no longer **not** write a book. After 20 years in the field of volunteer management, I have decided to focus on what I see as a major catch-22 in the field: the need for volunteer managers to expand their roles to include in-house staff training - without sufficient resources to assist them in this challenging role shift.

Many of my workshop participants have processed the great A-Ha, "If I am the only one in my organization who understands good principles of volunteer management - so what???! Until I can be assured of **commitment** and **competence** in volunteer utilization among the staff, the volunteer program can never reach the vision I have for it. The challenge is how to take what I know about working with volunteers and share it effectively with all personnel - salaried and non-salaried."

Volunteer management is most frequently one of numerous job responsibilities the person holds. Faced with enormous expectations and small amounts of time, volunteer managers have repeatedly asked for: (1) resources and practical techniques for gaining staff "buy-in" to the volunteer program (**Commitment**) and (2) tools to use with staff to promote effective utilization and support of volunteers. (**Competency**)

Included in this book are:

1. a brief look at the emerging role of volunteer program leaders as staff trainers
2. suggestions for enhancing staff commitment and competency in volunteer utilization
3. tips and techniques for generating staff buy-in for the volunteer program
4. a menu of topics and methods to increase staff competency in volunteer utilization
5. a review of the basics in good training design and delivery
6. specific assistance in presenting the 55 Minute Series to Staff

The companion user-friendly **55 minute expandable modular training series** is designed for leaders of volunteers to utilize for in-service training, orientations, retreats, etc. The series is complete with key concepts, activities, pertinent handouts, and ready-to-reproduce transparencies. Topics include:

Volunteer Supervision
Interviewing Volunteers
Designing Volunteer Jobs
Volunteer Performance Reviews
Tapping into Volunteer Motivation
Recruitment of Volunteers
Delegation
Recognition
Risk Management: What staff need to know
The Board's Role in Leading and Supporting
the Volunteer Program

As a bonus to those purchasing the complete set of modules, an accompanying computer disk is included so that the user can tailor the information for his/her organization's specific use.

CHAPTER I

The Changing Role of Today's Leaders of Volunteers

We, the willing
Led by the unknowing
Are doing the impossible for the ungrateful
We have done so much for so long with so little
We're qualified to do anything — with nothing!

Although I have never been able to track down the author of these words, my fantasy is that they were first uttered by a frustrated manager of volunteers!

For many years individuals entrusted with the leadership of volunteer programs have been responsible for doing the recruitment, orientation, training, recognition, and ongoing management of volunteers within their organizations. Thousands of volunteer coordinators were trained to carry out this function, assisted by the growing body of volunteer management theory. Far too many, however, have labored diligently, trying single-handedly to manage a volunteer program in organizations where there was little buy-in, support or appreciation for their efforts. This has taken its toll on volunteer managers and on the programs they have led. It has now become obvious that successful volunteer programs involve both the **commitment** and **competence** of **all staff** within an organization.

As organizations have begun to closely examine and re-design how they do business, we too are given the opportunity to closely examine and re-design the role of volunteer manager. New responsibilities such as in-house consultant, leader and trainer redefine the position. Today's volunteer director must be acknowledged as the organization's problem-solver, catalyst and resource for assisting the staff in attracting, coaching and managing a diverse and talented volunteer pool. If, as frequently in the past, volunteer management knowledge remains with the volunteer manager alone, it will continue to be impossible to create a truly effective volunteer program.

And so... effective volunteer managers must spend less time working directly with volunteers and more time with staff and leadership volunteers. In this decentralized method of leading a volunteer program, volunteer directors must assume different roles that require an even higher order of skills than in the past. They will need to develop consultant, facilitation and training skills so that they can share their knowledge about effective management of volunteers with the staff and leadership volunteers who deal with volunteers on an ongoing basis.

In many situations this transition will involve movement from being a reactive "slot-filler" to becoming a proactive Volunteer Program Executive/ Administrator. In other words, instead of spending most of their time reacting to staff directives about volunteers they need NOW, they will focus their energies on leading the organization in the creation and maintenance of excellent volunteer programs. This will be a challenge both for the organization and for the current volunteer manager. It will involve persuading the organization to support this shifting role and to commit the resources required for the volunteer program manager to make this shift. It is to this end that this Book and Modular Training Series were developed.

References for Chapter I:

Vineyard, Sue, Megatrends and Volunteerism (Heritage Arts Publishing, 1993).

Chapter II

Designing A Staff Training Program: Conducting A Volunteer Program Assessment

"We cannot become what we need to be by remaining what we are."
Max De Pree

If you indeed see yourself as a Volunteer Program Executive, one of your key concerns will be the empowerment of the organization to utilize volunteers effectively.

Before you can lead this effort, you must have an accurate assessment of the existing volunteer program or the organizational climate to initiate one. The information in this chapter is specifically designed to assist your efforts at identifying those staff needs which can be addressed through a training/education program. Assessments will also reveal issues and problems which will be best resolved through adaptations in the program design, implementation processes, and guiding policies. These are important discoveries that must be addressed simultaneously for the ultimate success of your program. For purposes of this book, however, the central focus is on the design of effective educational opportunities to enhance staff commitment and competency in working with volunteers. Because each organization is at a different stage with its volunteer program, you will need to adapt the materials and methods to fit your organization.

Purpose and Value of An Assessment

The primary purpose of this assessment is to discover the major strengths and weaknesses of the volunteer program. The assessment can be part of an overall volunteer program evaluation or it can be targeted to gather information which will impact the design of a training program. An assessment should capture the collective sense of strengths and weaknesses, rather than reflect the expression from a handful of folks who freely share their opinions.

Assessments can also serve to anticipate problems, particularly if the program is just being established or if it is discovered that many staff are not feeling committed to the program nor competent in volunteer management skills.

The following information and tools should help guide your process.

Steps In An Assessment

1. Gain approval from the Executive Director, Superintendent, Principal, or whoever will need to support the implementation of the results. Establishing or enhancing a training program will involve financial resources, access to staff and time allotted to you for this endeavor. Therefore, it is imperative that significant decision makers are on board!

2. Establish a task force or utilize your volunteer advisory council to assist you in the development of the assessment tool and the method of sharing results. Representation from line staff, administration, volunteers and board would be optimal. Without this involvement, buy-in to the results is apt to be very disappointing.

3. Determine who should be asked to participate in the assessment and what methods of information retrieval would be most effective. (Should we have an anonymous questionnaire, a small focus group discussion, etc. ?) After selecting the most appropriate method(s), formulate questions which will elicit the information you need to help design your volunteer training program. (See suggested sample questionnaires in this chapter.) If possible, have the questionnaire field tested by a few staff so that you are certain the questions can be answered with ease and that they elicit the information you are desiring.

4. Administer the assessment and tally results. Look for repeated concerns, themes, volunteer management topics of greatest interest to staff, signs of resistance or lack of commitment to the volunteer program.

5. Have the task force analyze the findings and make suggestions for addressing the issues and concerns that surfaced. Note particularly those that can be addressed through training. Concerns and issues for which training is not the answer should be separately noted for the task force to analyze.

6. Present the findings and resulting recommendations to the Executive Director, Board or any administrator that needs to approve the plan.

7. Present a summary of the findings and recommendations to the appropriate staff and volunteers.

8. With input of your task force or others who can effectively contribute to this process, design the in-service, retreat, educational or facilitated sessions to deal with commitment and competence issues that surfaced.

9. Implement your program and evaluate its impact through follow-up assessment by participants as to improvements resulting from the intervention.

10. Because training is an ongoing process, each assessment of a training or facilitation becomes part of the foundation for future training plans.

Methods To Obtain Information In An Assessment

There are numerous methods to gather information in a volunteer program assessment but most will fall within these five categories:

- ***Volunteer Program Assessment Guides***
- ***Tailored Questionnaires and Surveys***
- ***Focus Groups***
- ***Observation and Materials Review***
- ***Use of a Training Needs Assessment Tool***

(1) Volunteer Program Assessment Guides

Listed in the bibliography are several published volunteer program assessment guides which can be utilized by staff and volunteers to look at the overall strengths and weaknesses in their programs. Since they are generic they may not totally fit your agency. However, they can often be the starting point for identifying areas where training may be useful in diminishing barriers in the program. These assessments generally cover all elements involved in volunteer management including such areas as job design, risk management, and recruitment.

(2) Individual Questionnaires and Surveys

The following are suggested questionnaires which could be given in writing or in small focus group discussions to staff, volunteers and administrators. These questions are primarily aimed at surfacing issues around commitment, support and competency of administrators, staff and volunteers. You may adapt them to meet your organization's needs.

NOTES

Assessment of Volunteer Program and Staff Training Needs

Staff Input

This survey is part of the agency plan to enhance our organization's delivery of services to our clients. The information you share will assist in the design of an in-service training for staff and lead volunteers who work directly with volunteers to carry out our mission. Your thoughtful and honest response will allow us to design the training as specific and useful to your concerns and issues as possible. The individual information will be kept confidential but collective themes and recommendations will be utilized in proposing training topics and methods. Thank you for your assistance.

Agree ——————Disagree

1. The time and effort I invest in supervising volunteers is well worth it because of the benefits accrued from volunteer service.

2. Volunteer participation enables me to perform activities/tasks I would not otherwise be able to do.

3. Volunteers are well oriented towards an understanding of my priorities, concerns, frustrations, etc., as a staff person.

4. In general, volunteers are qualified for their positions in our organization.

5. I feel recognized and rewarded by the organization for my efforts with volunteers.

6. I think that I possess the necessary skills to manage volunteers.

7. I would feel more competent in my involvement with volunteers if I received:

    - stronger orientation to the volunteer program
    - written information on the volunteer program
    - other (list)

Rate Your Comfort Level With These Skill Areas in Managing Volunteers

Strong——————————————————Weak

Interviewing ____________________

Supervision ____________________

Delegation ____________________

Volunteer Evaluation ____________________

Risk Management ____________________

Volunteer Motivation ____________________

Volunteer Recognition ____________________

Volunteer Job Design ____________________

Volunteer Recruitment ____________________

What do you see as the major problems or barriers to utilizing volunteers more effectively in our organization?

Please elaborate on any specific concerns/requests that you would like to see addressed in volunteer management training for staff and volunteer leaders in our organization.

Betty Stallings, 1996

Assessment of Volunteer Program and Staff Training Needs

Administration Input

It is important in designing a staff training program in volunteer management that we have your perspective, commitment and thoughts to guide us. I will look forward to discussing these questions with you at a convenient time or, if you prefer, you can answer the questions in writing prior to our meeting. Thank you for your leadership in ensuring high quality services to our clientele through our staff/volunteer teams.

1. When hiring staff, is consideration given to their experience, motivation and skills in working with volunteers?

2. Do you think that the role of staff in supervising volunteers is clearly defined in our organization? If yes, how is this accomplished?

3. Are staff evaluated as to their work with volunteers in the organization? If yes, how is this accomplished?

4. In what ways are staff rewarded for excellence in working with volunteers? Any new ideas?

5. Do you think that staff training in volunteer management principles is important to enhancing our readiness to effectively utilize volunteers?

6. How could the orientation to new staff be enhanced to give more information and expectations about our volunteer program?

7. What is your philosophy on training of staff, board and lead volunteers to be better equipped to work with volunteers?

8. In your opinion, is the Board of Directors given adequate orientation and updates on the volunteer program of our organization?

9. What is a realistic expectation of the level of support for staff training in working with volunteers? (Resources such as books and tapes on volunteer management, access to staff for training, time for volunteer manager to prepare and deliver the training)

Betty Stallings, 1996

Assessment of Volunteer Program

Volunteer Input

This survey is part of the agency plan to enhance our organization's delivery of services to our clients. The information you share will assist in the design of in-service training for staff and leadership volunteers who work directly with volunteers to carry out our mission. We would appreciate your thoughtful and honest response. Your individual information will be kept confidential but collective themes and recommendations will help guide efforts towards a new training program. Thank you for your assistance.

Name (Optional)________________________________

1. In what positions have you volunteered at our organization?

2. Have you found your volunteer work to be interesting, challenging, fun?
   Comments:

3. Did you receive sufficient orientation prior to volunteering with us?
   Comments:

4. How would you characterize the supervision given to you by staff or leadership volunteers at our organization?

5. Do you think that your time and talents are well suited to the volunteer position that you hold (held)?
   Comments:

6. Do (did) you feel sufficiently trained/coached in your volunteer job?
   Comments:

7. Do you feel well appreciated by the organization, staff, clients, other volunteers?
   Comments:

8. What are the volunteer program's greatest strengths/weaknesses?

   Strengths:

   Weaknesses:

9. What suggestions do you have for improving the volunteer program?

Betty Stallings, 1996

(3) Focus Groups

If written questionnaires are inappropriate due to the size or culture of your organization, you may find that leading an informal discussion on some of these questions may access more information. Important things to keep in mind: (1) clearly state the purpose of the discussion, (2) keep the discussion focused, (3) share what will be done with the information, and (4) give feedback as to what plans will be implemented as a result of these and other forms of information gathering.

(4) Observation and Materials Review

A good assessment frequently includes an analysis of existing programs through a review of the materials that give shape and form to the volunteer program (e.g., volunteer or staff manuals, intake and interview forms, risk management policies, etc.) as well as general observation of the volunteer program in action. Such analysis and observation will add a deeper dimension to the opinions expressed on questionnaires. You may wish to ask college interns in Organizational Development to help design and implement this component of the assessment.

(5) Training Needs Assessment Tool

One of the most direct ways to access information about training needs is to use an instrument such as HRD's T-NAT (Training-Needs Assessment Tool) which is listed as a resource at the conclusion of this chapter.

This tool is basically a vehicle for analyzing and documenting an individual's training requirements as compared to his or her present knowledge or skill for performing a specific job.

Step One:
The first step is to identify the skills necessary to perform the role of supervising volunteers (e.g., interviewing, supervision, job design, etc.).

Step Two:
The second step involves answering two questions:

1) **What is the present ability level of the employee for each skill/knowledge mentioned in Step 1?** (e.g., interviewing - level of skill could be low if used only in work with volunteers)

2) **For each job, what skill level is needed for satisfactory performance?** (i.e., the skill level will need to be high if staff select their own volunteers; or it may be low if staff are given volunteers who are screened by a volunteer coordinator)

The answer to these questions will reveal either a discrepancy - training is needed, or a match - no training is needed.

In the T-NAT process, staff plot their ability and the job need level on a grid. It becomes immediately obvious where the most significant training needs are (i.e., very high need for a particular skill but low ability/experience level).

A training action plan can be derived from analyzing and prioritizing needs. The training activity form identifies the skill, the priority for need in training, a training plan and a timeline for completing the plan.

This tool may be an executive director's preferred method since it takes a short amount of time and can be utilized in other skill areas for employees. It is an excellent adjunct to a volunteer program assessment. Its additional value is its usefulness in educating staff about the skills and knowledge involved in managing volunteers.

The Assessment Results

The information you have gathered from one or a combination of the above methods is the foundation for developing strategies to enhance the program. If you are overwhelmed with the material, involve someone who is skilled at identifying themes, prioritizing them and succinctly presenting them to key people within the organization.

It is often tempting at this stage to proceed directly to making changes in forms, procedures, etc., or to design some training for staff. It is extremely important, however, to note any signs of staff resistance to the volunteer program and give these issues and concerns priority focus.

References for Chapter II:

Ellis, Susan, Volunteer Management Audit (United Way of America, 1992).

McCann, Travis and James T. Tashimer, Training Needs Assessment Tool (Organization Design and Development, Inc., 1994).

Silver, Nora, At The Heart: The New Volunteer Challenge To Community Agencies (The San Francisco Foundation, 1988). - Chapters 15-17 on Assessment of Volunteer Programs.

Stallings, Betty, Volunteer Program Assessment Guide (Building Better Skills Publishing, 1994).

NOTES

CHAPTER III

Designing A Staff Training Program: Gaining Staff Commitment to The Volunteer Program

"There is no such thing as education without motivation."
Ivan Sheier

Commitment can be enhanced once a person feels more competent in his/her ability to perform a task. More often, however, interest in learning comes after someone feels motivation or commitment to an activity. That is why it is important to be sensitive to any staff resistance to utilizing volunteers before launching an in-service training program to build staff competency in skills related to managing volunteers. People do not tend to "hear" information unless they see a reason for learning it.

If you have the good fortune of having a highly motivated, receptive staff, you can move with confidence into the design or enhancement of the staff orientation and training program. But don't be surprised if some day in the future, you need to refer back to some suggestions to tackle this challenge.

Identifying and Understanding Staff Resistance

Frequently resistance is not so much active sabotage as passive resistance. It is not so much what staff do, rather what they don't do (e.g., request volunteers for interesting work, give ongoing informal recognition to volunteers).

Resistance to volunteers (and thus to learning how to work cooperatively with them) is frequently derived from fears held about volunteers:

- The time needed to supervise volunteers without returned value to merit this time expenditure
- Issues around volunteers being a threat to client confidentiality
- Concerns that staff will be "stuck" with them if they say "Yes"
- Fears that volunteers will be utilized as justification for reducing a budget
- Concerns that job security may be threatened by volunteer replacement

Pretending that these are not valid issues or simply giving pat answers will only deepen the apprehensions. It is important to surface and understand the staff members' previous experience working with volunteers or being volunteers and their resulting hesitations and perceptions.

Dennis C. Kinlaw in Coaching For Commitment indicates that the four essentials to building staff commitment are: **Influence, Clarity, Appreciation** and **Competence.** I would add a fifth: **Mission/Vision.** The following are suggestions as to how to build staff commitment with these essential principles as underlying foundations. (Competence will be dealt with more thoroughly in Chapter IV.)

Methods To Gain Staff Support To Build A Solid Staff/Volunteer Team

1) Influence

We know that people are committed to activities and programs that they have a part in designing. Thus, participating in an assessment is an excellent method to begin building staff involvement (influence) in the volunteer program. Influence is further enhanced by including staff in the feedback and problem solving sessions. Ideally, in a retreat setting, give feedback from your assessment survey regarding issues and barriers which were identified as keeping staff from enthusiastically supporting the volunteer program. Encourage honest sharing of any additional concerns of staff.

In response to the list of concerns and issues, ask the question, "What can we do, organizationally and personally, to break through these barriers?" By asking the question in this fashion, you are asking for their involvement and influence in the solution of the problems.

A common barrier mentioned in sessions I have led is, " Volunteers do not give enough return value for the time invested in them." In breaking down the issue, it often leads to a productive discussion of types of volunteer jobs available, qualifications and screening of candidates, volunteer jobs requiring extensive training with no obligation for service, etc. These discussions ultimately propose solutions such as more careful job design, assigning only qualified volunteer candidates, etc. With these improvements, staff can begin to experience the tremendous benefits that occur when they work with carefully matched volunteers. The time invested is now far surpassed by the value given by these volunteers.

More often than not, the fears and issues keeping staff from commitment can be addressed by improving or adapting some aspect of the program or by providing essential training to staff. Because the staff are **involved** in these solutions, the program becomes theirs and they begin to develop commitment to it.

2) Clarity

A major stumbling block to staff / volunteer success is a lack of clear definition as to roles. Without written volunteer job descriptions which include job tasks, requirements of volunteer candidates, and benefits of the position, it is always a nebulous working relationship and therefore difficult to supervise, evaluate or dismiss volunteers. When staff begin to see that supervising volunteers is very similar to good supervision of paid staff, they begin to listen with a new ear.

It is equally important for staff to have a clear understanding of what is expected of them in the management of agency volunteers. Most often, this expectation is an unclarified, unwritten assumption. This lack of clarity can promote the feeling that supervising volunteers is a lower level activity. Therefore, commitment can be compromised due to considerable effort being channeled to those tasks and activities spelled out in their written job description.

Clarity on policies and procedures, risk management, reporting requirements, etc., is also exceedingly important to build in cooperation and commitment to the volunteer program for both salaried and non-salaried staff. There are numerous outstanding books written over the past few years that have made volunteer program design, planning and policies considerably easier to develop. Don't re-invent the wheel; there are many models to use and adapt for your organization.

It is possible that the impact of the clarity issue, although the cause of significant barriers to volunteer/staff success, may not be viewed initially as the source of concern. Thus, the manager of volunteers may need to bring this issue to the attention of the staff and administration of the organization.

3) Appreciation

Supervising volunteers is a challenging, often thankless job. To enhance staff commitment to the volunteer program, it is important that they are rewarded for their efforts to partner with volunteers in the accomplishment of the organization's mission. Recognition is frequently given only to volunteers, ignoring the extra efforts of staff to support volunteer activity. When staff are noticed for their efforts, their enthusiasm and commitment are frequently enhanced.

One of the most effective ways to implement staff recognition is to honor the team of staff/volunteers at appreciation events. Having them both recognized further underscores the philosophy and significance of teamwork. Staff in human service endeavors often put in many more hours than they are ever compensated. Therefore this appreciation can have multiple positive effects on their morale and commitment to the organization and to the volunteers.

Special informal recognition by the managers of volunteers and/or by the executive director and letters of appreciation for staff personnel files can also do wonders!

Including a special section in volunteers' orientation which sensitizes incoming volunteers to the pressures and concerns of staff is another form of recognition to staff. This sharing can be most effectively performed by a staff person. I have seen it done very well in a humorous skit and discussion (e.g., a typical day in the life of our staff - including all the interruptions, a crisis or two, etc.).

4) Mission/Vision

Whether you are just initiating your volunteer program or attempting to enhance one already in existence, your first step is to lead the organization in the establishment of a mission for the volunteer program. Few programs ever give thought to this crucial activity. Ideally this mission statement is developed and written by the board of directors with input from the administration, manager of volunteers, and volunteers within the organization. An inordinate number of problems occur in a volunteer program because it has no clear written mission statement and no accompanying set of values upon which policies are established.

If volunteers are utilized merely as a form of saving money, I can almost guarantee future problems in the volunteer program. A volunteer program based solely on economics will look very different than one whose vision and values extend well beyond cost savings. The following are examples of **Mission Statements** that are included in books by Susan Ellis, Linda Graff and Steve McCurley.

- "The achievement of the goals of this agency is best served by the active participation of citizens of the community. To this end, the agency accepts and encourages the involvement of volunteers at all levels of the agency and within all appropriate programs and activities." (Steve McCurley, Volunteer Management Policies, 1990)

- "Our agency encourages the teamwork of salaried staff and volunteers so that we can offer our consumers the best services possible. Volunteers contribute their unique talents, skills and knowledge of our community to provide personal attention to consumers, enable the salaried staff to concentrate on the work for which they were trained, and educate the public about our organization and its cause." (Susan Ellis, From The Top Down, 1988)

- "Volunteers are an integral part of our team. Without them, we would be unable to offer the outstanding quality of programming that we provide to our clients." (Linda Graff, By Definition, 1993)

- "Volunteers, and the contribution they make through volunteering, significantly enhance the quality of life, community spirit, and leisure time opportunities in Burlington. Volunteers are a valuable human resource requiring and warranting support and encouragement to maintain and develop their skills and to ensure their continued involvement in the provision of leisure opportunities throughout the City. The Parks and Recreation Department will continue to develop and provide support for volunteers and volunteer groups to ensure their continued involvement in leisure services and to develop this resource to its fullest." (Linda Graff, By Defintion, 1993, from Burlington Ontario Parks and Recreation Department)

Most people develop commitment to a vision/mission that enthusiastically draws them to a higher calling. When I facilitate a retreat for a nonprofit organization where staff are deeply resistant to volunteering, I frequently utilize a simple four-step process that breaks through this resistance and generates positive, visionary energy.

Rather than starting off with all of the current problems related to the volunteer program, have retreat participants reflect on an ideal program for their organization and how it might be achieved. The following key questions/reflections will stimulate a discussion in this visioning process.

1) **Think about a volunteer in your organization whom you would describe as ideal! Reflect on what they have accomplished for the organization, for you and for themselves.** (This can be shared in small groups if there are a large number of participants; or ideally, several people can share his/her thoughts with the entire group.)

2) After everyone has the ideal person and his/her impact firmly fixed in their minds, **ask participants to imagine multiplying this person by 100** (you can choose any reasonable number for your organization). **Begin to share what could be accomplished if you had these 100 ideal volunteers working in your organization.** Record all the responses. It is amazing to feel the energy rise in the room as they describe the impact of having a number of great volunteers working with them in accomplishing their mission.

3) After the ideal is pictured, ask, **"What are the barriers, issues, or problems keeping us from accomplishing this?"** The participants will most likely list such issues as:
   - no effective recruitment and screening of volunteers
     ("We're desperate and take anyone.")
   - routine, boring jobs for volunteers
   - no support or training for staff who supervise volunteers
   - volunteers not held accountable.

   Record all of these comments on flip charts so that the participants can deal with them in the next step.

4) The last question is, **"What can 'we' do to begin breaking through these barriers to accomplish our vision?"** This begins the problem-solving session where staff, manager of volunteers, volunteers, and administration are all seeking solutions to these barriers. If there has been enough energy generated around the vision of a successful program, problem solving is productive and creative. It is important for you to remember that the sign of a

good manager is someone who is able to assist people in breaking through barriers that are preventing their success. Keep the discussion focused on what needs to change organizationally. This begins to move responsibility for the success of the volunteer program to the entire organization, not just to the one person whose role it is to provide leadership to the volunteer program. (Remember, you are a Volunteer Program Executive now!)

5) Competency

Without staff feeling a level of comfort with the skills and knowledge needed to successfully work with volunteers, commitment will be hampered. Even if staff do support the utilization of volunteers, their ardor will diminish if they are not successful in their work with them. Thus, the essential need for competency training.

Armed with some essential foundations of commitment - influence, clarity, appreciation, vision/mission - we can now devote time to the heart of this book: developing staff competency.

References for Chapter III

Graff, Linda, By Definition: Policies for Volunteer Programs (Volunteer Ontario, 1993).

Kinlaw, Dennis, Coaching For Commitment: Managerial Strategies for Obtaining Superior Performance (University Associates, Inc., 1989.)

Scheier, Dr. Ivan, So You Still Want To Win With Staff (Yellowfire Press, 1987).

NOTES

CHAPTER IV

Designing A Staff Training Program: Building Staff Competence

"Insanity is doing the same thing over and over again, expecting different results."

Unknown

There are many factors associated with a successful volunteer program. In Chapter III, the critical elements in having the organization's buy-in and involvement with the volunteer program was discussed. No longer can its success or failure fall on the shoulders of the one person designated to manage it. Frequently in my workshops I ask managers of volunteers if they have ever had staff members say (while pointing a finger at them), "Your volunteer is not working out!" The anxious laughter that follows is an indicator of this pervasive problem.

The second key factor for success in a volunteer program is having staff who are competent in the skills of supervising volunteers. Occasionally, a manager of volunteers or an administrator will make a deadly assumption: "Since the staff seem committed and enthusiastic about volunteer utilization, they must be proficient at it."

Except for cursory explanations of how the volunteer program works, staff often receive very little support and training in the skills of working with volunteers. The volunteer program can be meticulously structured and may pride itself on recruiting wonderful volunteers; but if these volunteers work with staff who are neither committed nor competent in utilizing volunteers, the volunteer revolving door syndrome may occur. This often results in staff comments such as, "See, volunteers are not reliable" - the death knoll to a volunteer program.

Let us turn now to the **critical factors for building staff competency** through a carefully constructed training and technical assistance program. Exploration of the following questions may be a useful guide:

(1) In general, what are the training needs (skills and knowledge) of staff who work with volunteers?

(2) What are some methods to provide volunteer management education to staff?

(3) What are some occasions to provide volunteer management education to staff?

(4) How do you gain the support of administration to provide you access and resources necessary for staff training?

(5) How can you stimulate staff interest in receiving skills training in volunteer supervision?

(6) How can you provide educational opportunities if you are not a trainer?

(7) How can you evaluate the impact of staff training?

The training needs of staff who work with volunteers

Training needs are best determined by asking two questions:

What do staff members need to know to be successful in working with volunteers?

What do staff already know?

The gap between the two answers (what they need to know and what they know) will identify the learning needs.

What does staff need to know to be successful working with volunteers?

Training programs are generally designed to affect one or more of the following types of learning: knowledge, skills and attitudes.

Knowledge: Staff who work with volunteers may need knowledge in the following areas:

- trends impacting volunteering
- policies and procedures for the volunteer program (e.g., dismissal, risk management, performance review)
- information about significant groups of volunteers working at the agency (e.g., seniors, youth, corporate)
- roles and responsibility of staff in the volunteer program
- cultural sensitivity, etc.

Skills: Staff who work with volunteers generally need skills in:

- delegation
- interviewing
- recognition
- supervision
- job design
- recruitment
- conflict resolution
- communications
- motivation
- performance reviews, etc.

Attitudes: It is important for staff to examine their attitudes regarding:

- the value of volunteers
- importance of management functions such as performance reviews, risk management
- delegation
- confidentiality

What do staff already know?

Some staff are managers who have the basic skills of personnel management and mainly need to transfer these skills, with some adaptations, to the management of volunteers. Other staff may have no formal education or experience in management and therefore need some basic skill development to work effectively with volunteers. Thus you may need to design several adaptations of the training.

It is helpful to identify areas of priority and to design training that follows natural sequential learning (e.g., job design before recruitment). It is also important to factor in current issues and needs of your organization's volunteer program when selecting topics. For example if you add a program with youthful clients, you will need to augment screening and risk management training. Every organization will discover their own uniqueness as they answer these questions and study the results of their formal or informal volunteer program assessment.

Adult education principles teach us that adults are most apt to learn in areas that they identify as needs. Therefore, it must be underscored that designing an appropriate training program should involve extensive input from those who will participate in the training. Adult learners must feel a need for the information and must receive information that will be immediately practical and useful to them. Therefore, if possible and appropriate, involve some staff on the task force to design the training program and include some staff in the delivery of the training.

Armed with identified learning gaps, you can now begin to look for appropriate methods and times for delivering the training.

Methods to provide volunteer management education to staff

Organizational variables such as size, geography, age of organization, staff experience, will guide you in determining which of these methods of education would be most appropriate to your organization.

1) **In-service training series** for the organization, department, or new staff which could be held 2-6 times a year on topics selected by a training task force in conjunction with the training assessment results.

2) **Orientation on volunteer program for new staff** with written materials, one-on-one coaching with Manager of Volunteers or appropriate person, and/or quarterly orientation sessions with new staff.

3) **Video training** with focus on the staff utilization of volunteers. You could utilize a commercially developed videotape by a national trainer, such as Marlene Wilson, Sue Vineyard or Susan Ellis; or you could have one designed specifically for your organization. College interns or professional videographers

could donate the in-kind service. There are obvious advantages to this form of training. No one on staff needs to design and present it each time it is needed. And it can be very flexible in that volunteers can view it from home if unable to attend a training session.

4) **Books and library resources** can be very helpful in designing training. You can review material and distribute information that would be particularly useful to staff. Be certain that you are honoring copyright laws when you distribute material. Most authors in the volunteer management field are very generous in allowing material to be copied if it is for in-house use only.

5) **Newsletter tips** on working with volunteers can be particularly useful when you work in a large, geographically spread organization. The Department of Mental Health and Retardation in Austin, Texas shared its staff newsletter with me. They initially provide field service staff with a resource binder and on a monthly basis add tips and resources which can be added to the binder. They often gain permission to copy articles from such publications as "Nonprofit World" which has excellent articles on volunteer management. A subscription to "Grapevine Newsletter" can do much of the work for you as it contains the latest information in the volunteer field. You are given permission to copy portions of the newsletter if you follow prescribed procedures. (see references at the end of this chapter.)

6) **Retreats** are an excellent way to provide competency training for staff. They are often suggested by staff when they begin to see the advantages of knowledge gained through in-service sessions and other resources shared with them.

Occasions to provide volunteer management education to staff

Each organization will have different opportunities that are particularly suited to their focus, structure, and size. Listed below are a few times when volunteer management training might be considered:

- When staff is newly hired
- When a new volunteer program is initiated
- During agency re-organizing
- At the first meeting of a committee or task force
- During staff meetings: Ask to provide in-service training at several meetings during the year or ask for a regular brief time to provide information and education on effective volunteer utilization at each meeting.

It is best to provide a planned, ongoing educational program to staff. However, often your entree will come at a time of crisis. People tend to become more motivated to listen if they think you have information that can assist them in the solution of their issues or crisis. Be cautious, however, if you are asked to train staff on "the joys of utilizing volunteers" at the same time that staff are experiencing an impending cutback. The dynamics of that volatile situation can be awkward. It would be wise to spend more time educating administration on the issues surrounding perceived job replacement by volunteers.

Gaining Administrative Support to Provide Access to Staff and Resources for Educational Support

Convincing administrators to support your training efforts may be challenging. You must construct your request to include how your training and educational materials will ultimately enable the organization to reach its mission more effectively with a strengthened volunteer program. Since administrators must make difficult decisions based on priorities, resources, impact, etc., you should ask some staff to join with you in this request so that the desire and need is an expression of the staff, not just the manager of volunteers. In your proposal, also include the problems and impacts when staff are <u>not</u> well trained to utilize volunteers. If there is resistance to your full plan, ask for an opportunity to present one training and be certain to give follow-up of staff feedback to administrators. Having staff give their endorsement can be crucial to future access.

Involving the administrator early in the process of the assessment and design of a training program will prevent the disappointment of efforts being thwarted after long hours of preparation.

If you are a member of DOVIA, AVA or another professional volunteer manager group, ask to share ideas with others who are attempting to build administrative support for their training program.

Developing Staff Interest in Training and Education in Managing Volunteers

Staff will only be interested in training if they can understand how it will benefit them. It must be perceived as solving their problems. For example, rather than inviting them to a workshop on Interviewing Volunteers, invite them to learn the skills in designing interview questions that will **screen in** the right volunteers. The following are some additional suggestions:

1) Involve staff in the process of identifying skill/information gaps and designing methods to provide them. Utilize these same staff to sell the training to other staff.

2) Make certain that the training is designed to solve staff identified problems. If you alone have defined the needs, your presentation will fall on deaf ears.

3) Have the agency administrator endorse the training and participate, if possible.

4) Offer the same training topic twice so that staff can select the most convenient time to attend.

5) If you have a 3-4 part series, offer a certificate of completion suitable for framing. Write a letter for participant's personnel file.

6) Utilize staff in the training. A peer to peer educational exchange is generally more readily accepted. This is a wonderful way to recognize a staff person who models excellent leadership of volunteers.

7) Involve some of your outstanding volunteers in parts of the training. (In a seminar on staff training I gave to a Florida DOVIA, a participant shared that she learned the most about recognition when a panel of her organization's volunteers shared what kinds of recognition they had received and which ones had been the most meaningful.)

8) If due to budget restraints and other barriers, you are not given staff time to present skills training workshops, offer a lunch time **optional** series where lunch (and perhaps other incentives) are built in. If the word gets out that the sessions are beneficial, you may reach many who will share the word with others. Eventually, it may work its way into the regular staff hours. It is legal to offer optional training during non-working hours.

Providing Educational Opportunities If You Are Not A Trainer

If you are not experienced as a trainer, you may choose one of several options:

- **If you wish to develop your training skills :**
  (1) Attend a train-the-trainer workshop
  (2) Read some excellent books on designing and delivering training, adult education, etc. (See bibliography for some suggestions)
  (3) Begin by doing brief training sessions to small groups to build your confidence and competence in this skill area.

- **If you don't have time to design workshops,** you will find that the modules associated with this book will be a great time saver for you. Many directors of volunteers who utilized the modules and trainer guide during the field testing indicated that they were able to deliver a module after only 1.5 hours of preparation. You will also find that these user-friendly tools can easily be tailored to meet the specific needs of your organization. A train-the-trainer class to receive content delivery tips may be advantageous.

- **If you do not wish to become a trainer yourself,** you can hire an outside trainer who specializes in volunteer management. Or you can hire or exchange services with another volunteer director in your area who is comfortable with training. You might also propose a partnership with another organization whereby they provide training either jointly with their staff or to your staff exclusively, in exchange for a service you will provide for them.

When I was an agency director we often utilized the in-kind donated talents of corporate trainers. If they train in human resources, they could readily train with the modules on volunteer management. If you have a Junior League in your area, they often have excellent trainers who are also knowledgeable in volunteer management issues.

One last suggestion would be to incorporate volunteer management principles into other management training offered to your staff. Since we encourage staff to use the same basic management principles with volunteers as they would with salaried employees, it may be possible to augment your organization's basic management training with information on working with volunteers. You would be seen as a resource person assisting in the training rather than taking full responsibility for it.

Very few people start their careers as trainers. They develop the skill once they have information to share and potential learners who need this information. Once you get over the jitters of your first attempts, you may find yourself improving rapidly - and even enjoying it!

Evaluating the impact of staff training

Three types of evaluation methods can be utilized to determine whether a training has been successful:

- ***Initial Participant Reaction***
- ***Measurement of Learning Objectives***
- ***Behavior on the Job***

1. Initial Participant Reaction

Initial participant reaction is the most common evaluation method used. Participants are generally asked to respond to an evaluation questionnaire, rating such aspects as quality of presentation, clarity of goals, physical location, etc. This method has very little to do with impact as there has been no time to try out new skills or use new information on the job. It does, however, have significance as to how staff sees the benefit of devoting time to the topic. If they leave with a feeling of increased enthusiasm and a sense of being better equipped to do the job, there will be an increased buy-in and commitment to the volunteer program. When this initial feedback is given to administrators, they will be more likely to endorse future training. On the contrary, if the initial reaction is that the information is not useful or presented in an interesting fashion, the impact will be nil to negative. So, an initial reaction can be an important first indicator of probable success.

2. Measurement of Learning Objectives

This method examines whether the learning objectives were in fact accomplished. During the closing stages of a training, one can use review exercises that will indicate whether participants changed attitudes or learned new knowledge or skills. Although indicative of probable benefit, it cannot be assured. Changed behavior on the job will be the significant indicator.

Each of the modules in the 55 Minute Series has a set of learning objectives that will be met if participants absorb the key concepts upon which each module is built. Thus, if one of the learning objectives is to have participants know the four steps in interviewing volunteers, you can test this learning through an interviewing role play and feedback session.

3. Behavior on the Job

To determine real impact of training, one needs to allow time for participants to try out new behaviors. Then, follow up and assess the change. This type of evaluation is rarely done because of the time it takes to gather the information. A helpful question to include on an evaluation is, "What do I plan to do differently as a result of this training?" Simple follow-up questions you could ask participants, in person, via computer, or by survey are, "What are you doing differently since the seminar? What have you noticed to be the impact of your changed behavior, approach, attitude?"

A sample evaluation form is included in each of the modules associated with the 55 Minute Training Series.

References for Chapter IV

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Notes

CHAPTER V

The Basics of Good Training

"Spectacular achievement in training is always preceded by unspectacular preparation."
Betty Stallings

There are literally hundreds of books written on the subject of training. For those of you interested in professional development in this area, I would highly recommend that you invest the time and money in some of the books in the reference section of this chapter. The purposes of this brief chapter are (1) to highlight what I believe are the essential features involved in good training, and (2) to share some general training tips for those of you who, with the aid of the 55 Minute Series, wish to begin or enhance your role as an in-house staff trainer in volunteer management.

My comments fall into four major categories:

- ***Principles of Adult Learning***
- ***Training Design and Content***
- ***Climate and Room Set-up***
- ***Trainer's Delivery of Content***

Principles of Adult Learning

Assuming that most staff you will be training are adults, it is important for you to understand features of adult learners which will guide you in both content design and in the delivery of that content.

1) Adults determine for themselves what is important to learn and therefore are looking for relevant, useful information.

2) Adults bring a broad base of experience and a need to validate information based on their past beliefs and experiences.

3) Adults have many preoccupations outside of a particular learning situation and will be easily distracted if the information is not practical and well presented.

4) Adults respond to positive, appropriate reinforcement. They are hesitant to show vulnerability and are particularly offended by "put downs" (e.g., "I think we already covered that, Jack.").

5) Adults generally have a preferred style of learning:

   Auditory (they will like the lecture)
   Visual (they will like the transparencies and handouts)
   Kinesthetic (they like the exercises and self learning activities)

   A good trainer includes all styles so as to reach a diverse audience.

6) Adult learning is particularly impacted by feelings of physiological comfort (e.g. chairs), safety (location of training) and social interaction (relationships with other participants and the trainer.).

7) Adults have significant ability to serve as knowledgeable resources to the facilitator and to other participants.

8) Adults tend to be problem-centered and will feel satisfied only if their problem is dealt with and resolved. This is a good reason to uncover these issues prior to or at the beginning of a seminar.

9) Adults have set habits and tastes. For example, some need caffeine, some want health food, some are offended by profanity, and some environmentally concerned participants are distressed when handouts are not printed on both sides. Effective workshop leaders accommodate as much as possible these adult habits or tastes. If not, the evaluation form will not relate whether they gleaned anything from the workshop but rather what offended them.

10) Adults are people who can change and grow - a prime tenet of faith for workshop leaders to hold.

11) Adults function best in a collaborative environment and like to share in the planning and presentation of the workshop. (This is particularly true if the training is in-house.)

Along with this need to understand basic adult learning principles, one must also pay close attention to the needs and level of knowledge of your particular workshop participants. If you have some experienced staff who may not need basic training in volunteer management topics, you might involve them in the delivery of the training or, minimally, use a facilitated style of learning where these staff can share their experiences.

The staff training assessment should guide you in your selection of topics. Remember that adults want practical information that can solve their problems. Often as they struggle with finding solutions to their problems, they begin to realize that the solutions are connected to increased knowledge and skills in areas they had not identified as a problem. For example, staff may not define delegation as a problem but may discover in problem solving that a probable cause of repeated disappointments in volunteer follow-through may be related to their own skill and ease in delegation to volunteers. When this "A-ha" occurs, they often initiate a request for training in this area.

Training Design and Content

The 55 Minute Series has done much of this work for you. However, I strongly encourage you to adapt the material to the needs of your organization or to develop new topics that may be of particular use to your staff. The following are a few recommendations as you prepare to design and/or select your content:

1) Good training design begins with the assessment of the learning needs of anticipated participants. Your content should be built around the gap between what staff needs to know to be successful and what they already know.

2) After the topic(s) are chosen, it is important to specify key learning objectives that deal with knowledge, skills and attitudes. Learning objectives basically describe what a participant should be able to know or do or feel at the conclusion of the seminar.

3) Select a moderate level of content: the tendency is to throw in everything you know about a given topic. The result is a rushed session where little is retained. The best approach to developing a lean curriculum is being selective - choosing the **need to know** before the **nice to know**. When the content level is kept moderate, the trainer can lead activities that experiment with and reflect upon what is being presented.

4) Provide printed resources that will be utilized and/or shared (e.g., handouts, activity sheets, training manual for participants, in-house forms, information to be brought by participants). These resources greatly enhance learning if they are well done and tie closely to the presentation. If handouts are distributed and no acknowledgment is given to them, they are infrequently read or utilized.

A typical sequence for training is:

Beginning of training -

Purpose of session
Learning objectives and key concepts
Climate setting, ice breakers

Middle of training -

Content developed around key concepts, done in logical fashion and building from theory to application, knowledge to skill. Selected training activities/learning methods varying from passive to participant phases:

lectures
role play
slides
flip chart
group dyad activities
panel discussions
brainstorming
case study, dramatization, etc.

Occasional breaks and energizers if session is longer than 90 minutes

End of training -

Review and summarize content

Have participants process experience ("What will I do differently when I return to my job?")

Conduct an evaluation to get a sense of the perceived value of the session to the participants. True evaluation occurs if you can arrange a follow-up form whereby actual impact can be recorded. For example, "As a result of the workshop in interviewing, I now see its value and have arranged to give half hour screening interviews to volunteer candidates in my department.")

Climate and Room Set-up

The environmental and climate factors in a training are critical to a seminar's overall success. The following are areas to consider:

1) Room size, set up

Managing the seminar's physical environment is not always totally in your control but there are several key factors that are critical to its success.

Consideration should be given to the size of the group and type of relationship you want to promote between yourself and the group. A small group in a very large room will feel cold and impersonal so it is best to create your corner by using room dividers, plants, etc. The reverse, cramming too many people in a room, can create visual and comfort problems. If the tables can be situated in a horse shoe pattern, you can create a more intimate environment. A horse shoe arrangement, however, with many empty seats creates energy gaps for the trainer (i.e., your energy flows through the gaps).

When you are giving a workshop, participants' chairs and tables should be arranged so that everyone can see the leader's table and the space where he/she will be training. Common seating set-ups are herringbone (tables slanted towards the center) or round tables where seats are placed so that everyone can see the trainer. (For details and drawings of room arrangements, see The Great Trainer's Guide by Sue Vineyard, pp. 128-129.)

2) Lighting

Natural lighting is always favorable but if there are too many windows (with good views!) day dreaming may be a major activity of participants. Pay attention to lighting so that participants can take notes, the trainer is seen, and transparencies or other media are clear. This may involve utilizing a darker spot for the overhead projector. Avoid turning down lights as day dreaming may turn into real dreaming!

3) Acoustics

Consideration must be given for clearly hearing the trainer and for participants to hear one another. Utilizing a lavaliere microphone may be necessary in large groups. Always repeat any participant question or comments if he/she is not in hearing range of others. If people have difficulty hearing, it is nearly impossible to recapture their interest. Prior to training, always check acoustics for the person who will be seated furthest from you.

4) Temperature and Ventilation

This one is always a challenge! For everyone who is cold in a seminar, there will be someone who is warm. The best way to deal with this critical factor for participant comfort is to have a temperature which is comfortable for most participants. If you are training in a room at your organization which tends to be hot/cold you might remind staff of this so that they can dress accordingly or dress in layers. Occasionally parts of a room are a different temperature due to heat and air-conditioning vents. If you know this to be the case, you may want to alert participants to these conditions before they get situated.

5) Seating Comfort

This is not always in your control, but you need to remember that learning and interest decrease rapidly when participants are in hard chairs. Think of ways to allow learners to move around, stand up, etc. There is nothing more disturbing after a workshop than to read evaluations which spend most of the time referring to the unsatisfactory climate and environment factors.

6) Food and Beverages

The rule of thumb is to have variety if you are doing seminars for over 90 minutes. More people are health conscious and can be quite disturbed if all that is offered in the morning is caffeinated coffee and donuts. It is best to let participants know in advance by a flyer, E-mail, etc., what will be served. Then, they can attend to their own needs if necessary.

Another pointer is to carefully select a luncheon menu that is not too heavy if participants will be continuing their training in the afternoon.

7) Audiovisual and Equipment Aids

Having good equipment can support a good training program but poor equipment can be a major distraction. (I could write a book on the humming, dirty, lopsided overhead projectors with which I have trained!) Make certain a day or two ahead that you have the equipment needed to present your training. If your organization does not have an overhead projector, many businesses or libraries will loan you one. Always have an extension cord and an extra light bulb on hand - just in case!

8) Restrooms

This is generally an issue if your training is over 90 minutes and you are selecting an off-site location for the training. You may need to lengthen your breaks if restrooms are limited in number for the size of the group.

9) Traffic Flow in the Room

The room should be arranged so that the registration table, refreshments, exit doors, display tables, etc., are at the back of the room so that you and the participants are not distracted. It is also helpful to ask participants to sit in front seats so that late comers can slip into the back without causing commotion. At the beginning of a seminar it is helpful to ask if any participants will be leaving early. If so, ask them if they would sit close to an exit.

10) Name Tags or Identification

If people in your training session are unknown to you or each other, I would suggest that they have their first names (in big print) on a tented paper in front of them. If they are unknown to each other, name tags are also helpful.

Trainer's Delivery of Content

It is one thing to know information, quite another to effectively communicate it to a group. Through my experience, I would note several qualities and skills for successful delivery of a training:

- ***Variety in Training Methods***
- ***Participant Interaction***
- ***Flexibility***
- ***Pacing and Transitions***
- ***Natural Humor***
- ***"Been there" feeling***
- ***Appropriate Dress***
- ***Effective Use of Equipment and Visuals***
- ***Organized Training Space***
- ***Presentation and Facilitation Skills***

1) Variety in Training Methods

There are numerous training methods from active to passive that can be used to introduce or reinforce a concept or skill. These methods are based on a single or combination of senses: sight, sound or hands-on. The key is to match methods with the type of participants involved and to provide variety related to the learning outcomes desired.

Common training methods include: structured warm-up exercises, presentation of content (lecture), demonstration, film/video, small group dyad discussion, questionnaires, role plays, games, case study. It is important to recall that research has shown repeatedly that information shared orally will, after 3 days, be 90% forgotten. When your participants "see" with visuals (e.g., transparencies) as well as being told, they will lose only 35% of the information. Approximately 70% of Western Culture learn primarily from visual stimuli. Therefore you need to formulate your message and activities using visuals and words.

Whatever methods are selected, it is important to design feedback so that participants acknowledge the learning and begin to apply it to their own work situation. As a trainer, I have found that the simplest feedback exercise after a group exercise is to ask them to summarize their major learnings. Rather than each group sharing their entire list, ask them to add items which have not been previously mentioned. Rotate the feedback order during the session so that more groups get "floor time."

2) Participant Interaction

As previously mentioned, adults learn best by sharing their ideas, experience and responses with one another. Therefore, even in workshops as brief as 55 to 90 minutes, one should aim to facilitate rather than teach most concepts. Generally (and there are exceptions) most of the answers are held collectively in the group. In the 55 Minute Series, if you are unsure of your facilitation skills, you can present the material. It is generally preferred, however, if you ask the question. For example, rather than telling participants the qualities of a good interview, you ask them to recall a time when they were interviewed well and have them share the skills and qualities of the interviewer. You can actively record the information on flip charts or transparencies and then add any traits which are notably missing.

At the early stages of training, using the facilitated approach may feel more difficult as you must be able to rephrase and summarize "on your feet" and you must keep the group focused on the task at hand. New trainers tend to gradually move from mostly presentation (it's safer, and you can prepare and control it) to a combination of presentation and facilitation. Comfort with the information and additional training experience seem to make the difference.

3) Flexibility

Being organized and prepared are admirable qualities in a trainer but often situations occur (e.g., equipment breaks, participants struggle with a concept longer than anticipated) that require that you to change plans to provide a good learning experience. It seems that the ability to be flexible comes with the confidence derived from continued experience.

4) Transitions and Pacing of Material

The energy of your audience will fluctuate. Those variations should, to some degree, guide you in decisions around the methods and content you cover.

Some generally accepted guidelines include:

- ***Early morning is generally the best time for a short, punchy, quick delivery***
- ***Midmorning is an optimal time for group involvement***
- ***Late morning is a good time for tough work since it is when people are generally most alert.***
- ***After lunch is important for participant involvement which will help them re-energize and overcome post-lunch lethargy.***

One of the most important skills in a training is how you make transitions from one concept or topic to another. It is helpful if the participants know the flow of the day up front. Also, making linkages between concepts can help people see how the individual segments of training all fit together to change attitudes or to build a knowledge or skill base. When I was starting out as a trainer I spent much of my time thinking through (and often writing down) transition segments of the workshop. It comes more naturally after you have had experience.

5) Natural Humor

Responding spontaneously to humor in the group is considerably more effective than planned jokes. If people can laugh and learn simultaneously, you will have a winner. Humor is harmful when it is sarcastic or somehow makes participants feel stupid or inept.

6) "Been there" Feeling

Perhaps nothing separates effective trainers from theoreticians more than the genuine qualities of an authentic person who has stood in the shoes of those they train. If you do not have volunteers directly reporting to you, you will have a difficult time truly appreciating the challenges of leading volunteers. Theory is important but it must be followed with concrete, practical suggestions as to how participants can diminish the barriers and problems they experience in this work.

7) Appropriate Dress

There are no hard, fast rules regarding appropriate attire for training. I have found that I am most comfortable when I dress to blend with the participants (with a slight upgrade) so that they can relate as well as respect me. Dressing well beyond your audience puts you at a psychological distance from them. Also I have discovered that wearing something very comfortable and attractive will give me an added boost of confidence allowing me to focus my energies and attention on the group. If people spend too much time at break talking about your earrings or tie and not the content of the seminar, that is a clue that you may have overdone it!

8) Effective Use of Equipment and Visuals

Be as assertive as you can about the need for proper equipment and good placement of the teaching aids. Your excellent presentation can be ruined if attention is not devoted to this. Numerous studies have shown that visuals increase the effectiveness of presenting, as measured by retention, anywhere from 38% - 200%.

Since the 55 Minute Training Series utilizes an overhead projector and flip chart, here are some suggestions for better results in using them:

Overhead projectors and screens:

1) Screens should be 42" off the floor. Optimum visibility can be achieved by placing the screen in a corner and angling it toward the center of the room. This allows you to write on the overhead projector while facing the workshop participants. Plan for a minimum of 8 feet between the projector and the screen.

2) Tilt the screen forward at the top or back at the bottom. If the projector beam does not meet the center of the screen at a 90° angle, "keystoning" image distortion will result.

3) The table should be large enough to hold the projector plus an "in" and "out" stack of transparencies and any other items you may need during your presentation (e.g., marking pens, examples to show, notes). Often I need to place a small table next to the projector table since it is generally too small to hold all that is needed to be at your finger tips during a training.

4) In writing transparencies, use the 7 by 7 rule - no more than 7 lines of type, no more than 7 words per line. Keep it simple!

5) A transparency should contain only one overall idea but acceptable numbers of sub-ideas can be increased as the experiential level of the audience is raised. If you wish to cover some portions of the transparency, you may wish to try the method of cutting out a piece of cardboard or file folder which is 11 by 11 inches. (The standard transparency is 10 by 10.) Tape 2 or 3 pennies to the top of the cardboard and slide it under your transparency. Move the cardboard down as you reveal new information. When finished, slide the cardboard up so it completely covers the lighted stage; remove your transparency and place the next one on top of the cardboard. You will be eliminating the distracting light or clicking on and off of the equipment.

6) When you present material, maintain eye contact with the audience. Avoid reading the material from the screen or turning your back to the audience.

Flip charts

1) Flip chart recording is particularly helpful in small groups when you are capturing audience response. They also can be printed in advance of the training. Sue Vineyard suggests that you use a post-it note at the bottom of completed pages with a key word to recall the theme of the page. For larger groups, up to 200 people, you will need to limit yourself to 10 lines of 2" high letters using a 1/4 inch thick magic marker. Alternate colors are good for emphasizing key points or moving through sequential lists.

2) When recording, strive to use participants' exact words. This can be done by asking, "Does this capture what you said?" "Can I paraphrase that by saying...?" or "Would you summarize that idea in a phrase or two for our record?"

3) Use abbreviations liberally, e.g. > (greater than) < (less than) ^ (increase), etc.

4) Always face the group and stand to the side of the flip chart when recording.

5) Consider having someone be a recorder while you are gathering information from the group. It is best if this person is skilled at recording. Too often, a person is "volunteered" only to find out that they are not able to perform the task adequately. This causes problems for you and for participants. It is also taking a staff person from the seminar and placing him/her in a role where he/she can no longer participate in the discussion.

These are a few suggestions for working with visual aides in the 55 Minute Series. I would suggest that you read some of the books listed at the end of this chapter for further guidance. I particularly recommend Delivering Effective Training Sessions by Geri McArdle (from the Crisp Series in Palo Alto, California).

9) Organized Training Space

A major consideration in room arrangement is the presenter's workspace. It is a reflection on you as a professional. Participants will expect you to be organized, calm and in control of your materials and equipment.

A few tips:

1) Have a separate table for handouts, name tags, extra note paper, pencils, etc., near the training room entrance.

2) Ideally you will have a separate table for the overhead projector which should be wide enough to hold transparencies, a master copy of your script and notes, and the participant handouts.

3) Have your notes where you can see them but participants cannot. The best deliveries seem spontaneous and "live."

10) Presentation and Facilitation Skills

Each of these are subjects of full books. Suffice it to say that if you have weaknesses in either area, you may wish to register for public speaking or facilitation classes or read some outstanding resources in this area. But don't wait until you feel you have perfected these skills to begin to train. So much learning comes from trying out your skills, evaluating your own performance and improving each time you present. For beginning trainers, it will be easier for you to start by presenting the material and utilizing the script provided to you as a model.

Each time you present, however, gradually take one area and gather information through a facilitated participant discussion where you ask the questions posed in the modules rather than merely give them the answers. Nearly all participants from organizations that were involved in the field testing of the modules commented on how useful the participant discussions were as they related to their organization's issues. Facilitation generally takes longer than presentation, but ultimately results in a more receptive audience and in greater retention and utilization of the material discussed.

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Chapter VI

Conclusion

Try It, You'll Like It

Having read through this book and reviewed some of the 55 Minute Modules, you should feel increasingly ready to tackle what I consider to be one of the most critical tasks facing effective volunteer involvement: the development of commitment and competency in the staff and lead volunteers entrusted to mobilize, manage and team with today's volunteers. The success or failure of a volunteer program can no longer lie on the shoulders of the one person designated to manage the program.

Managers of Volunteers must convince their respective organizations that one of their primary roles should be reaching staff and volunteers with the information and resources necessary to make volunteer experiences successful for the staff, the organization and the volunteers.

It is my hope that the 55 Minute Series and this companion book will be important new tools in achieving this goal.

Notes

APPENDIX

Using The 55 Minute Module Training Series

A Unique Perspective

The majority of literature in the field of volunteer management is written to educate the person designated as the organization's manager/coordinator of volunteers. This book and associated training modules have a unique perspective, with tools to deliver this needed information in-house to all staff who interface with volunteers. Together, they provide a guide to developing a training program to enhance an organization's utilization of volunteers.

To be truly effective, today's manager of volunteer programs must be able to share his/her knowledge about effective management of volunteers with the staff and volunteer leadership who work with volunteers on an on going basis. This shift in the role of the manager of volunteers towards staff empowerment is great theory, but is challenging to deliver. Managers of volunteers often have numerous hats to wear and are stretched to find the time necessary to design fast-paced, practical skills training. Concurrently, the overloaded organization is reluctant to devote time to having staff trained. Thus, the 55 Minute Series was born to give the manager of volunteers a time-saving tool that can be respectful of the time limits demanded by busy human service staff.

The series is based on some of the critical skills, attitudes and knowledge that organizations need to implement a volunteer program. The modules are primarily written for the manager of volunteers who wishes to deliver or enhance his/her in-house training but has not been able to address this need due to limited design time, expertise or training experience. As one of the Pennsylvania field test reviewers put it, "Stallings has done all the work for us."

The series was written to be a complete stand-alone tool for experienced as well as inexperienced trainers. However, many non-trainers involved in the field testing reported that their presentations were enhanced if they participated in a train-the-trainer workshop given by a Volunteer Center or other resource training organization. Modules were field tested in sophisticated, large mainline nonprofit organizations as well as in small, rural volunteer programs. All participants found it useful and easily adaptable to their organizations. The average reported preparation time to present a module was less than two hours.

The features that have made the series so attractive are its thoroughness, its ability to be tailored to an organization, its user-friendly script, and the pertinent handouts and ready-to-reproduce transparencies. The possibility of delivering content in a 55 minute time slot is a very attractive in-house marketing tool. Most organizations that tested the modules, however, were encouraged by their eager participants to expand the time to allow for greater discussion regarding specific issues in their organization.

The Module Design

Each module singles out a specific generic topic such as interviewing, delegation or recognition and focuses the content around four key concepts. For purposes of illustration in this chapter, examples are taken from the module on interviewing.

I encourage trainers and facilitators to tailor the script to their organization; but it can stand alone as the basic script for the presentation. Each module can be shared in one of 3 ways:

1) information sharing primarily presented by the trainer,
2) a combination of information sharing and facilitation of group exercises and discussion, and
3) a facilitated discussion surrounding one or all of the key concepts in the topic.

The modules may be expanded through additional activities or several modules can be grouped together for a retreat or seminar. For example, supervision of volunteers could include the supervision, delegation and performance review modules.

Each module is separated into three packets:

(1) Trainer's Guide,
(2) Copies of transparencies and handouts, and
(3) Trainer/participant note pages which consist of reduced-size copies of each transparency with space for note taking.

Module Components

I. Trainer Guide

Introduction

Each module begins with information which sets the stage for the topic. Its primary purpose is to discuss why the topic is critical to good management of volunteers and how it relates to other management skills. This information also may be utilized to develop a marketing piece for the training; or it can be used by the trainer in the beginning of the session to share how these skills are crucial for success in working with volunteers.

> **Excerpt from the Introduction to Interviewing:**
> "Interviewing candidates for a volunteer position is imperative to ensure that the organization is selecting the most qualified person. The interviewer guides a discussion to determine if there is a good match between the interests and needs of the organization and the volunteer. This often involves some mutual negotiations so that both parties are winners. Without this significant screening step, many misplaced or inappropriate volunteers begin to work for organizations, and both the volunteer and the organization become dissatisfied."

Purpose and Learning Objectives

Sharing the overall purpose and key learning objectives of a training helps participants to understand what they can anticipate learning. It gives an immediate sense that the session will be a thoughtful, directed and careful use of time.

A significant way to evaluate the training success is to have participants fill out the evaluation form in the packet. One section of the evaluation lists the learning objectives which participants indicate were met or not met during the training session.

If you modify the workshop, you may need to change or alter the learning objectives so that they are in line with your training focus.

As trainer/facilitator, you may wish to design additional activities and discussion topics to determine whether participants achieved the established learning objectives. For example, you could expand the interview workshop with a role play to determine if participants use the four step process of interviewing.

Excerpts from purpose and learning objectives in the Interviewing Module:
"The primary purposes of this module (Interviewing) are to examine the need for interviewing and screening volunteers and to share the basic process and skills necessary to do it effectively."

Participant Objectives
Upon completion of this module, participants will be able to:

1. Discuss the importance and purposes of having interviews with prospective volunteers.

2. Review or initiate the 4 key steps in the interview process.

3. Design relevant interview questions.

General Notes to Trainers

These comments generally give some extra guidance to a trainer who will be utilizing the material without the advantage of interfacing with the module's author. Most of these comments were written to assist you, the trainer, in being comfortable with the script and to prepare you for any potential difficulties that might surface in the delivery due to the nature of the topic. Having trained on these topics many times, these notes are the result of my experience with participant response to the material.

Excerpt of General Notes From The Interviewing Module
"Most people have had many experiences where they have been poorly interviewed. Having them recall personal experiences of being interviewed effectively will immediately begin to reinforce the art and skills involved."

One-Page Trainer Overview of the Module

Many trainers find it useful to have a one page summary of their training which includes the major sections of the presentation, approximate time for delivery, method(s) of presentation, and corresponding Handouts and/or Transparencies for each section.

Excerpt from a Workshop Outline:

TRANSPARENCIES/ HANDOUTS	SECTION	METHOD OF PRESENTATION	TIME
T-1, T-2, T-3 H-1	**Introduction** Introductory Activity Learning Objectives 4 Key Concepts	Activity/Presentation	10 minutes
T-3 (#1), T-4	**Concept 1** Importance of interviewing	Presentation/Discussion	5 minutes

If you are adapting or expanding this module, you will need to make changes in this overview form. You may also wish to write actual times (9:00 a.m.- 9:10 a.m.) after you know the exact time you will have. This way you can be cognizant of how you are doing time-wise. The 55 Minute timing for these workshops is very tight. If you intend to use them as a quick review of basic information, time is quite adequate. However, if you are dealing with a subject where your organization is struggling or having resistance, you will want to expand the time in some sections.

Trainer Script

This section, the heart of the training, is built on four key concepts.

Excerpt From Key Concepts of Interviewing

1. The primary purposes of interviewing volunteers are:
   1) to determine a mutual fit between candidate and organization
   2) to screen for risks to the volunteer, organization and clients if the prospective volunteer is chosen.

2. The key steps in the interview process are:
   - Preparation
   - Opening
   - Body
   - Closing

Each script gives suggested opening introductory exercises, content and discussion questions, and activities regarding the four key concepts. In most of the key concepts, trainers will have the choice of presenting the information while utilizing the transparencies or eliciting the information from participants through facilitation.

> **Presentation style:** Trainer presents the reasons for the importance of the interview by using a transparency which lists client protection, staff and volunteer morale, and agency reputation.
>
> **Facilitator style:** Trainer asks the participants to share why interviewing of volunteers is important. (Trainer may record participant information and then add any reasons not mentioned.)

In most cases, it is advisable to use the collective information and experience from the group to surface issues. Participant based learning nearly always gets the best results. However, if the group does not have experience or information to share, you may need to present the data rather than facilitate the learning experience. Sharing of group ignorance can slow down the process and frustrate eager learners.

From my own training experience and from reading numerous evaluations of participants who participated in the module field testing, I continue to hear that the best part of training sessions were the discussions that resulted from the brief presentations of the key concepts. One sign of an experienced trainer is to know the group well enough to determine if they collectively have the answers (they usually do) or if you are dealing with a topic about which the majority of the group have little information and therefore would appreciate a more structured presentation. The modules were developed to be flexible for either method selected.

Closing

After sharing the four concepts, brief time is allocated for some form of summary or "next steps" discussion. This allows you to bring closure or to point to further work to be done on this topic.

Expandable Activities

Ideally, you will have more than 55 minutes to present the information in the module. My suggestions in this section focus on additional related activities or discussions that could extend the workshop.

Excerpt From Expandable Activities for Interviewing:

1. Deal with the policies and practices of turning down volunteer applicants and further discuss techniques for saying "no" to a volunteer applicant you are interviewing.

2. Spend more time designing specific interview questions for volunteer jobs in your organization.

Bibliography for the Module Topic

Resources listed in this section are not intended to be an all-inclusive list but rather a sharing of a few key resources that specifically deal with the topic as it relates to volunteers. Participants in my training frequently ask for only 1 or 2 resources as they are on tight budgets. Giving too many choices can be overwhelming. People looking for extensive bibliographies on these topics can find them in catalogs from such sources as Points of Light Foundation, Heritage Arts, Energize, and Volunteer Management Associates.

The purpose of the bibliography is: (1) to share some useful resources with trainers who do not feel grounded in the topic, and (2) to be able to provide additional resources to participants who wish further information.

Participant Evaluation Form

Each module includes a participant evaluation form which can be used to determine the response and usefulness of the training and to gain a sense of whether learning objectives were achieved by participants. You may wish to adapt this form to gather additional or different information.

If you have ample time at the close of the session, you may ask the participants to share their reactions and any suggestions for improvement in the seminar. It is particularly helpful for participants to share with others how they plan to apply what they learned.

II. Transparencies and Participant Handouts

Transparencies

A summary listing of the Transparencies and Handouts is found at the beginning of this section. Note that Transparencies are referred to as T-1, T-2, etc., and Handouts as H-1, H-2, etc. These numbers are noted on each transparency and handout and also are referred to at the corresponding section of the script.

Transparencies can be made by using 3M or other transparency film in plain paper copiers. They have been designed on Power Point 4.0 and are on the disk which comes with the full purchase of all modules.

For some trainers, transparencies become their presentation notes. They help both the trainer and participants to stay focused on the main points of the presentation. For trainers who have small or informal groups or who will be presenting the module in a facilitation style, recording participant responses on blank transparencies or flip charts may be more effective.

Transparency tips for new trainers

1) After you have made the transparency, put it in a Poly Vu protective sheet and place a colored sheet of paper between each transparency for ease in viewing. It is helpful if you use a separate color for each module.

2) When storing or training, place transparencies in a stack, in order of their use.

3) Most participants will be delighted to have copies of the transparencies or a set of the Trainer/Participant Notes pages which include a reduced size copy of each transparency. Participants will not need to be copying feverishly during the workshop. This is particularly helpful since you are working in very short time frames.

Handouts

Each module has some handouts which summarize or illustrate the key concepts. Many of the topics, such as interviewing and delegation, have principles which are applicable to working with any staff. Thus, the material may be helpful in other areas of their work. This is often a strong selling point to administrators who must sanction access to staff to do the training.

The handouts were purposely kept at a minimum since you will want to add any of your agency's pertinent forms, policies, procedures, etc., which deal with this topic. As an example, in the interviewing module you may wish to add a sheet of suggested interview questions for positions within your organization, a volunteer application form, and your volunteer/agency agreement.

There is always a lively debate as to whether handouts should be distributed before, during or at the end of a session. My advice is to use your own best judgment with the following thoughts in mind. If the handouts are a summary of information presented, you may wish to inform participants that they will receive them at the end of the session. If there are worksheets on which they will be taking notes, you will want to give them out at the appropriate time during the workshop. Since, however, time is a major factor in the delivery of these workshops, you may want to have them in a packet at the beginning of the session and refer to them, as appropriate. You will need to have an interactive session so that participants will not be tempted to read through all of the handouts while you are presenting Concept #1!

III. Trainer/Participant Notes

In this section are copies of all the transparencies with one reduced sized transparency and a space for notes on each page. The trainer can use them as his/her notes pages, adding agency stories, illustrations and exercises for tailoring the training. Or the participants could be given them in their packets to use for taking notes. To tailor the Transparencies, you will need to have the Module Disk and access to Power Point 4.0. Feel free to experiment with their usefulness in making the presentation.

Assembling Your Own Training Binder

You may wish to design your own in-house staff volunteer management training binder which would be a tabulated binder with pertinent information on various training topics. Training should be an ongoing process. Thus, you will be delivering new in-service topics as well as repeating ones for new staff. It is the intent of this author to continually design new workshops and revise others for this collection. Many of you can design or tailor your own workshops which will have particular significance to your organization or program.

Training Busy Staff to Succeed with Volunteers

- **Challenges** you to see today's volunteer manager as a staff trainer
- **Shares** methods to build commitment to your volunteer program
- **Guides** you in the design of training sessions to enhance staff competence
- **Reviews** the essentials of good training
- **Prepares** you for optimal use of the 55 Minute Training Series

RAVE REVIEWS from Field Testers of the 55 Minute Training Series

"I can say without hesitation that Betty Stallings' 55 Minute Training Series is the best I have seen. She has synthesized the literature in the field into well-planned, easy to use training sessions covering the critical issues for effective volunteer programs."

Judith Curley, Executive Director, Volunteer Center of Centre County, Pennsylvania

"We at Special Olympics International were privileged to participate in the field testing of this marvelous, user-friendly training resource. We look forward to adapting the modules for use by our chapters throughout the world."

Nancy Sawyer, Special Olympics International, Program Services Manager

"I found the modules very easy to tailor; this was the most comfortable I have felt presenting a training. Thank you, thank you, thank you! I can't wait to do more!"

Sam Pennings, Director, Volunteer Center of York County, Pennsylvania

About the Author:

Betty Stallings, M.S.W., one of North America's most respected and requested trainers, consultants, and keynote speakers, offers this long-awaited, user-friendly book and series of staff training modules: *Training Busy Staff to Succeed with Volunteers.* She brings to these materials a deep understanding of the challenges of the profession, having worked for over 20 years in settings ranging from grassroots organizations to large universities. She brings to volunteerism her curriculum development talent, extensive training experience, and a reputation for delivering a creative, inspiring, practical approach.

Her previous books are popular nonprofit resources: *The Resource Kit for Managers of Volunteers, Getting to Yes in Fundraising,* and *The Volunteer Program Assessment Guide.*