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# Justifying the Position of Volunteer Administrator

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**T**HE AMERICAN PUBLIC IS becoming preoccupied with controlling inflation, reducing taxes, and clamping down on federal, state and local government spending. Citizens appear anxious about government's growth, costs and ability to provide services. As a result, administrators in the field of human services are finding ways to justify programs, document costs, account for increased staff and the number of clients served. There seems to be a push, now more than ever, to involve citizens in our programs. They can work directly with clients, support staff, and provide input through advisory roles.

The Virginia Department of Welfare is committed to utilizing volunteers in its programs. This extends to the involvement of welfare recipients as volunteers. As many local welfare departments have been interested in implementing well-planned volunteer services—yet have been faced with justifying additional administrative and personnel costs—the state office recently developed standards for volunteer service positions. The standards had two purposes: to expedite the hiring of qualified staff under the approved personnel classifications of "Volunteer Services Director," "Volunteer Services Coordinator," or "Volunteer Services Representative," and to provide program justification.

## **Background: The Caseload Standards Study**

In 1974, the Virginia Department of Welfare began a study to:

- Provide information that would permit a true allocation of costs to specific classifications of services rendered by the department.
- Measure and monitor productivity of personnel.
- Provide qualitative and quantitative standards for staffing and planning.
- Provide the basis for sound and

**Looking for a way to measure the needs and benefits of volunteer services? To make your agency accountable for volunteer program development? Here's how the Virginia Department of Welfare did it by developing standards for volunteer services positions.**

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effective management controls for the department and local welfare agencies.

There are 124 locally administered welfare agencies under the supervision and jurisdiction of the Virginia Department of Welfare. Eighteen percent or 22 of the local departments participated in this study. Their selection was based on adequate representation of caseloads, staff, regions, planning districts, agency size and geographic location.

The duties and responsibilities of workers and the approximate time required to perform these functions were broken down into 1,600 different tasks. The scope of the study included both repetitive functions, such as the number of food stamp applications taken in one day and the amount of time required to process an application, as well as all nonrepetitive functions, such as participation in a training session. The time span of two consecutive months for the study was selected as adequate representation for reporting purposes.

Obtaining valid information to measure caseloads was one of the major considerations in designing a work measurement program that would be both practical and meaningful. Standard times were developed from arithmetic or weighted averages of the hours and case count reported by each participating agency for given program categories, employment positions, functions and tasks performed. Two broad categories of kinds of workers were determined, direct labor or direct service delivery workers (social workers) and program support workers (clerical or administrative aides). A ratio of direct labor staff and program support staff was established and is used by the Bureau of Personnel to allocate new positions. The case is the actual measurement unit.

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### How Do Volunteer Services Fit into These Standards?

At the time this study was conducted, very few agencies involved volunteers in their programs in a planned manner. Furthermore, it didn't seem appropriate to tie volunteer services directly to caseloads. Perhaps there was a place for those volunteers working directly with clients, but what about those individuals providing indirect or advisory services? What about material donors?

A "Catch 22" existed within our system. On the one hand, we were encouraging the utilization of volunteers and the importance of hiring staff to

coordinate the program. Yet, we were asking agencies either to give up a social work or direct labor position, or to fit these positions under the program support category. Realizing that this was not a feasible method of determining priorities or allocating volunteer services positions, a committee was formed to study the caseload standards formulas and to develop guidelines and criteria appropriate for justifying the need for volunteer services.

Research consisted of close examination of the "Volunteer Services Quarterly Report" forms that are submitted to the state department of welfare by

local agencies who use volunteers. The report documents the number of individual volunteers in each agency, the number of volunteer groups, material donations, and total number of hours contributed. The committee also looked at the quarterly reports submitted by twelve VISTA volunteers, who were recruited and placed in local welfare departments as volunteer coordinators. The committee felt that the data contained in both reports was accurate and that an analysis of this information could provide criteria for determining standards for volunteer service positions.

A plan was implemented in August

These definitions are in compliance with the Virginia State Government Volunteers Act passed by the Virginia General Assembly in 1977.

A further distinction is made between regular-service and occasional-service volunteers. Both categories shall include those volunteers performing direct, indirect, advisory and group services.

As outlined above, the Workload Data section specifies a minimum number of volunteers and a minimum number of hours of service to be contributed per year. The number of volunteers was determined by analyzing the data obtained from the Volunteer Services Quarterly Report forms and the VISTA volunteer reports for a period of one year. The number of hours of service was estimated from the same reports using the following computations:  
37 weeks per year x 3.5 hours per week x X-number of volunteers per year

Thirty-seven weeks per year was estimated as opposed to 52 weeks because new programs would require approximately 15 weeks of program planning, developing procedures and orienting staff.

## Standards for Professional Volunteer Positions

For the purposes of these guidelines, a volunteer is defined as anyone who freely provides goods or services without any financial gain to the Department of Welfare. Within the boundaries of this definition, a distinction is made between direct, indirect, advisory volunteers and material donors.

### I. DEFINITIONS

**Direct service** volunteers are people who have direct contact with clients in the provision of services on an on-going basis.

**Indirect service** volunteers are those who provide assistance to clients without necessarily having direct contact with an individual client.

**Advisory** volunteers generally have no contact with clients. They provide advice and counsel on various matters pertaining to the operation of the department.

**Material donors** provide money, goods, materials, employment and other opportunities for clients.

A **regular-service** volunteer is anyone who engages in specific voluntary activities on an ongoing or continuous basis.

An **occasional-service** volunteer is anyone who provides a one-time or occasional voluntary service.

### II. WORKLOAD DATA

A full-time volunteer coordinator shall:

#### Class A Agencies

Recruit, screen, train, assign and follow-up on a minimum of 20 regular-service or occasional-service volunteers, who shall provide a minimum of 2,500 hours of yearly service, of which no more than one-half of the total hours may be contributed by occasional-service volunteers.

#### Class B Agencies

Recruit, screen, train, assign and follow-up on a minimum of 35 regular-service or occasional-service volunteers, who shall provide a minimum of 4,500 hours of yearly service, of which no more than one-half of the total hours may be contributed by occasional-service volunteers.

#### Class C Agencies

Recruit, screen, train, assign and follow-up on a minimum of 50 regular-service or occasional-service volunteers, who shall provide a minimum of 6,500 hours of yearly service, of which no more than one-half of the total hours may be contributed by occasional-service volunteers.

Secure materials, goods and resources provided by material donor volunteers. Material donors should not be included in the count of regular or occasional-service volunteers as defined above.

1979 to expedite the hiring of volunteer service positions and volunteer program justification. The plan requires a local welfare department requesting a volunteer service position to submit its own plan as to how it will utilize volunteers in its programs and the number of hours they would be used. Their proposal must be in accordance with the guidelines developed by the committee (see box).

There has been a great deal of sup-

port for these guidelines from local departments across the state. They are regarded as a flexible, reasonable way to expedite the hiring of volunteer services staff. Local agencies no longer are forced to choose between direct service staff and volunteer services, or to justify a position under the program support category as previously imposed under the caseload standards study.

Competition still remains for the

allocation of local money in the hiring of new staff. The local jurisdiction is required to match 20 percent on all positions. The development of these standards, however, has proven to be a viable way of encouraging the development of volunteer services, making agencies accountable for program development, providing a quantifiable way to measure the needs of volunteer services, and for monitoring staff productivity.

### III. POSITION JUSTIFICATION

In order to accomplish the standards set forth in Section II—Workload Data, an agency must submit a plan justifying the need for a volunteer services position. This plan should address the following concerns:

- A. State the reasons for requesting a volunteer services position.
- B. Describe how staff and clients will be involved in planning the volunteer program.
- C. Will the position represent 100%, 75%, 50% or 25% of total staff time? This position will be a restricted position for the period of one year. At the end of the year, the Bureau of Personnel and the State Coordinator of Volunteer Services will make a determination on continuation of this position based on fulfillment of the following criteria:

#### Program Components

Program Components	Time Frame
A. Orient and train staff on the use of volunteers	1st Quarter
B. Needs assessment:	1st Quarter
1. Identify gaps in service delivery.	
2. Determine where volunteers will be most effective.	
3. Identify sources available in the community to support volunteer programs.	
C. Develop job descriptions:	Continuous
1. Develop based on needs identified.	
2. As new needs are identified, develop new job descriptions.	
D. Develop resources for your program management:	1st Quarter
1. Include plans for volunteer supervision, record-keeping, space, telephone usage, scheduling, and clerical assistance, as appropriate	
2. Develop procedures for recruiting and screening potential volunteers.	
3. Develop procedures for program monitoring.	
E. Recruit, screen, and select potential.	2nd-4th Qtrs.
F. Provide orientation and training for volunteers.	2nd-4th Qtrs.
G. Program monitoring.	2nd-4th Qtrs.
H. Recognize volunteers and staff who work with volunteers.	4th Quarter

### IV. REPORTING REQUIREMENTS

At the conclusion of one year's operation, the local agency shall submit a report to the State Coordinator of Volunteer Services and to the Bureau of Personnel. This report should include the following items:

- A. An unduplicated count of the number of volunteers providing service.
- B. Total number of hours volunteers contributed, distinguishing between both regular-service and occasional-service volunteers.
- C. Total number of clients served by the volunteer program.
- D. A description of the procedures instituted in managing the volunteer program.
- E. A description of problems encountered in the implementation of the program and the steps taken to correct these problems.
- F. Documentation of the percentage of time the new volunteer services position spent on each aspect of the program.

Section III requires localities to submit a plan justifying the need for a volunteer services position and the fulfillment of certain criteria.

Section IV outlines the data that should be included in the final report.