TEACHING STAFF TO WORK WITH VOLUNTEERS

BY
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LOOKING AT VOLUNTEERS FROM THE PERSPECTIVE OF THE STAFF

Imagine for a moment that you are a staff person who has never before worked with a computer. Chances are that sometime during the past ten years you fit that description, and may not even now be totally comfortable with computers. At a staff meeting the head of your agency announces that she believes that computerization is the only answer to the enormous workload that your agency faces, and that she intends to obtain as much computer equipment as she can for staff, none of whom at this point work with a computer. She announces that she has just hired a Director of Computer Operations to 'get the agency moving on this.'

Shortly after this meeting the new Director of Computer Operations walks into your office one day, deposits a computer on your desk, says "Here's your new computer, hope you enjoy it!", and walks out. There is no manual with the computer, no training session in its use, no knowledge in your possession about how to operate the machine, and not even much space in your office to accomodate it.

What would you do in this situation...?

Bang at the keys until something happened?

Place the computer in the corner and use it as a plantstand?

How would you *feel* if you were the staff person, given a possible resource that you don't fully understand and may even resent for the changes it imposes on your workstyle?

It may sound strange to say it but volunteers and computers have a lot in common, and each resource has suffered from haphazard attempts to implement their use within agencies.

Each resource is complicated and multi-faceted. Each requires specific skills on the part of the staff who will be utilizing it. And each, to be most effective, needs to be customized for the usages, setting, and personalities they will be working with.

About the only differences between a computer and a volunteer from a strict management standpoint are that volunteers are *more complex* (they can do a greater variety of things, if operated properly) and they are *less forgiving.*

A volunteer, for example, doesn't take well to being asked to stand in the corner and serve as a plantstand until needed...

This is a round-about way of explaining that staff difficulties in

WHAT WENT WRONG...& WHY IT HAPPENED

working with volunteers – whether those include active opposition, passive resistance, or simple inability to achieve creative usage – are probably not really the fault of any of the staff.

For the most part, many staff in agencies who are being encouraged to make use of volunteer resources are equivalent to a person given a computer and told: "*Bang the keys until something happens.*"

No matter how well meaning the staff person is, they are unlikely to accomplish much. They are likely to become frustrated. And they are very likely to damage the equipment.

To understand why this lack of ability to work with volunteers is so damaging, you must realize the immense changes that have taken place in volunteer involvement during the past decade.

Twenty years ago most volunteer departments operated, for the most part, on their own. Usually a volunteer coordinator (either paid or unpaid) supervised the activities of volunteers engaged in a variety of projects or programs.

Usually these volunteers were engaged in program activity that were somewhat 'separate' from other agency operations. The volunteer coordinator was responsible for almost all recruitment, job development, supervision, etc of "her" volunteers.

Visually, one could represent the management relationships involved in this system as a simple, two-sided continuum:

**VOLUNTEERS** ←————————————→ **VOLUNTEER MANAGER**
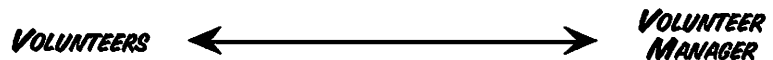
The volunteer coordinator was essentially responsible for everything that related to the volunteers. In some cases this resulted in rather silly management sytems in which one volunteer director was supposed to be 'in charge of' hundreds or even thousands of volunteers...

As volunteer involvement has become more sophisticated, this situation has changed dramatically. Beginning in the late 1970's volunteers began to 'diffuse' throughout the agency structure, sometimes assuming tasks and responsibilities that had previously been done by staff. As new activities were undertaken by the agency, volunteers began to work in partnership with staff, operating as 'aides' or members of teams, or simply as assigned workers to a staff department.

They began to work regularly 'with' and 'for' staff other than the volunteer coordinator.

This new system of volunteers working not just with the volunteer coordinator or manager but working more directly with individual staff has totally changed the dynamics of effective utilization within the agency.

In a visual sense, what has evolved is:

Volunteers   Agency Staff
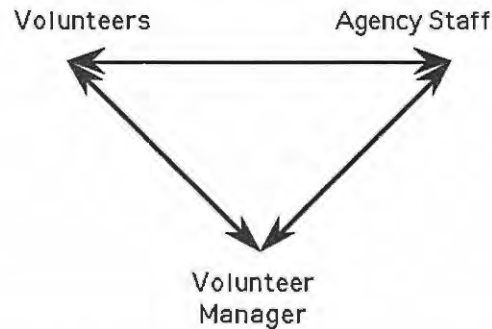
Volunteer
Manager

You will note that this three-sided relationship is much more complex than the old continuum.

There are probably two major differences which this new system creates:

✓ The first is a requirement that the volunteer director view their job in a quite different fashion. As you can see from the connective lines of the triangle, the volunteer director 'links' both to volunteers and to staff. This means that work must be done with each party to be successful.

✓ The second is the realization that the line of relationship between the staff and the volunteers is the primary line of management and supervision. If volunteers work on a day-to-day basis with staff, whether through an assignment with a single staff person, or in conjunction with multiple staff, then it is the quality of that management and interpersonal interaction which will determine whether the volunteer is effectively and satisfactorily involved.

A CHANGING ROLE FOR VOLUNTEER MANAGERS?

This shift in operational style is now at varying stages in different agencies. Generally, the larger the agency the more likely that volunteers work more directly with staff. It is quite apparent, however, that this new style is the most effective method of truly achieving optimal volunteer usage.

Think back to the computer illustration.

If a staff person is provided with a computer, does the agency Director of Computer Operations attempt to operate the

keyboard for each staff person?

Obviously not; indeed, the idea is ridiculous.

Why, then, should we not also expect the staff to 'operate' the volunteers with whom they work?

For volunteer utilization to function effectively, each staff person must understand and be able to implement volunteer management. They must have the capacity to comprehend the diversity of the volunteer workforce, to create imaginative and meaningful jobs for volunteers, and to effectively lead and supervise those volunteers with whom they work.

They must become, in essence, "Managers of Volunteers."

And, in turn, volunteer directors must realize that preparing staff for these new responsibilities may necessitate a change in their own roles.

One way of explaining this shift is to simply note the subtle but significant difference between two phrases:

DIRECTOR OF VOLUNTEERS

DIRECTOR OF VOLUNTEER SERVICES

The first, "Director of Volunteers," implies a person who 'directs' volunteers. It is the person responsible for everyday management and supervision of volunteers. In our computer analogy, the equivalent phrase would be 'computer operator.'

The second, "Director of Volunteer Services," indicates the person who is responsible for overall agency operations involving volunteers, but who does not operate each individual volunteer. Instead they enable, assist, and prepare each staff person to make effective use of their own volunteers. In the computer analogy this would be the 'Director of Computer Operations.'

What is needed is for volunteer managers to take a broader interpretation of their roles, viewing themselves as being responsible for the *system* of volunteer involvement within the agency, which includes working closely with both volunteers and staff.

THE VOLUNTEER MANAGER AS CONSULTANT

Alas, in the real world, this logical transition is made somewhat more difficult.

Quite frequently volunteer managers lack the real or apparent authority to 'direct' anyone, much less

THE ART OF DIAGNOSIS & INSTRUCTION

senior agency staff.

This lack of power makes it necessary for the successful volunteer manager to approach the role somewhat differently, assuming the guise of a 'consultant', one who helps when needed and one who does not, and usually cannot, order anyone to do anything.

The consultant, in a situation of this sort, engages in two types of teaching behavior:

The first is **diagnosis**. In this context that means working with staff, sometimes on an individual basis, to help identity the ways in which volunteers can assist them in accomplishing the work within their purview. The key element in this process lies in showing staff how to think about volunteers in such a way that they can continue to think of appropriate and creative usages for volunteers.
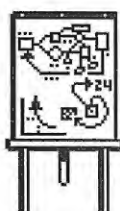
The second task is that of **instruction**. This would involve educating staff about the requirements and techniques of working effectively with volunteers. In essence, the volunteer manager turns the staff into 'volunteer operators,' knowledgeable about both the overall agency system of volunteer involvement and supervision of individual volunteers.

The volunteer manager will then identify, recommend and implement all the organizational actions which are needed to make it possible for staff to successfully accomplish the tasks and activities identifed during the diagnosis and instructional phase.

In all of this, the volunteer manager, acting as a consultant, concentrates on working with staff, not in attempting to coerce them. The point is to *persuade* and *empower* staff to think about volunteers from the perspective of a trained 'volunteer manager.'

And, inevitably, much as knowledge of, and even affection for, computers has blossomed in the consciousness of agency staff, we can succeed in inculcating the same improvement in volunteer utilization.

Always hoping, of course, that no one refers to our successful new users as 'volunteer nerds'...

ABOUT THIS TRAINING KIT

This training kit is designed to provide you with the information and tools to accomplish these two consulting tasks. It will tell you the basic information that needs to be conveyed to staff to make *them* 'volunteer managers', expressed in ways that are more likely to make sense to staff because they are based on the staff's perspective, and it will provide you with some concrete tools that you can immediately utilize in beginning to implement a training program for the staff within your agency.

Depending upon your own knowledge of the particular needs of your agency, you can determine your own plan for implementing the various techniques demonstrated in this kit. You may decide to conduct actual staff training workshops. If you do, you will find a variety of exercises, handouts, and overheads designed to assist you.

You may decide to approach staff on a one-to-one basis. If so, you can adapt the techniques and exercises in this kit for that individualized format.

Our recommendation is to consider utilizing the one-on-one technique if there is possible hostility or strong resistance to volunteers among the staff. Concentrate on generating success stories among those staff who do wish to work with volunteers and, in the long run, this success will 'soften up' or convert the dubious. No one has the power to 'force' a recalcitrant staff person to work *successfully* with volunteers: their quiet indifference will effectively serve to discourage any volunteers who are assigned to them...and every 'negative' example of volunteer utilization will only make your job that much harder, as well as unfairly punishing volunteers assigned to resistant staff.

You might also consider implementing these exercises on a trial or demonstration basis, offering them on an optional basis, for example, or incorporating some of them in orientation sessions that are provided to new staff. Over time these seemingly small investments will reap big dividends.

In the Handouts at the end of this kit you will find a *Staff Assessment Survey on Volunteer Involvement* which may help you determine both problems and opportunities, as well as issues that will need to be dealt with during any training session. We strongly suggest that you utilize it to get a clearer picture of staff attitudes and experience in your agency. The more information you have the better you can tailor a training program that will address both people and problems accurately.

To help you in either of the above formats, this training kit will take you through six 'exercises' focusing on key areas of staff training:

✓ *Exercise* #1: Convincing Staff of their Need to be Trained in Volunteer Management
✓ *Exercise* #2: Sensitizing Staff as to the Scope of Volunteer Involvement and Erasing Stereotypes about Volunteers
✓ *Exercise* #3: Orienting Staff to the Overall Agency Volunteer System
✓ *Exercise* #4: Helping Staff Develop Meaningful and Workable Volunteer Jobs
✓ *Exercise* #5: Assisting Staff in Designing Training Programs for Volunteers
✓ *Exercise* #6: Working with Staff to Identify Techniques for Effectively Supervising Volunteers

For each of these exercises you will find the following:

Explanation of the exercise, with tips on how to take participants through its various stages and hints on what to concentrate on.

Description of the handouts and overheads that are to be utilized during the exercise.

Tips on de-briefing the exercises, with suggestions on how to facilitate discussion and options for working further on this subject area.

Suggestions for follow-up, both to support staff who are working to implement the principles of the exercise and to work further with staff who are having problems.

CREATING A SYSTEM FOR STAFF INVOLVEMENT

You may also decide to utilize the techniques within this kit in assisting you to design an overall system of volunteer utilization within your agency that will be more supportive of both staff and volunteers.

No amount of consulting or training can be effective unless it has the support of the overall institution. While this training kit will not attempt to cover all of the overall agency mechanisms which are necessary for productive volunteer involvement, it will cover some of the essential elements which relate to the staff. If you are interested in a more complete look at volunteer utilization, you might want to take a look at *Essential Volunteer Management* by Rick Lynch and Steve McCurley.

In so far as that system for volunteer involvement relates

directly to staff, it requires that the following seven elements be in place:

1. Overall Policy on Volunteer Utilization

Each agency should have an overall policy on volunteer utilization, expressing *why* the agency wants to utilize volunteers. Reasons may include:
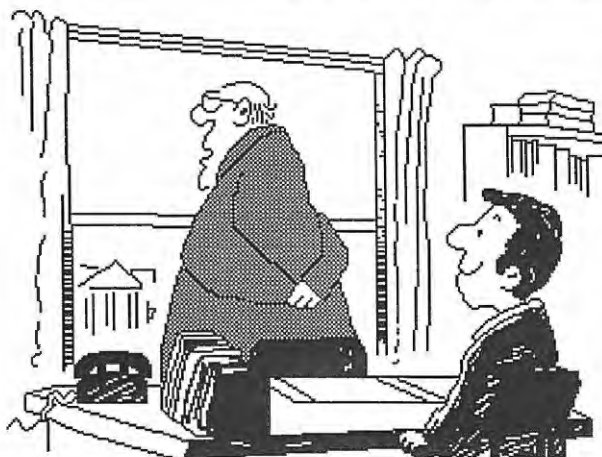
✦ Provide community outreach and input
✦ Gain additional human resources
✦ Cost-savings
✦ Supplement expertise of staff
✦ Allow involvement of client groups
✦ Demonstrate community support
✦ Act as conduit to funders
✦ Provide personal touch in services to clients

The policy should provide a clear rationale, which can be utilized in explaining the volunteer program both to staff and to potential volunteers. It indicates to the staff that the volunteer program is not just an emergency measure dreamed up one weekend by a desperate Executive Director, but is one which fits within the overall mission of the agency. The policy should:

✓ *Be adopted and supported by top policy makers*
✓ *Be integrated into overall agency plans and budgets*
✓ *Encourage, but not mandate, staff involvement.*

That last point is often overlooked, but is crucial. It is impossible to *force* staff to work effectively with volunteers. There are too many many ways for staff to sabotage a volunteer effort to think that staff can ever be coerced into productively utilizing volunteers when they do not want to. Even the *indifference* of a staff person will quickly communicate itself to volunteers, who will equally quickly decide not to staff where they are not wanted. Mandatory policies create resistance, and you will only be asking for trouble if you attempt to force compliance. Plan to work off rewards for productive staff, not punishments.

Exercise #1, *Convincing Staff of Their Need to be Trained in Volunteer Management*, is designed to assist you in making this agency policy become a reality by showing staff why it is in their own interest to learn about volunteer management.

2. Assessment of Staff Capabilities

The more you know about your staff the better you can design a system which takes into account their individual characteristics. A very effective preliminary tool is a quick look

at staff attitudes and experience with volunteers. This survey should ascertain the following:

✓ **Staff's previous experience with volunteering.**
This includes their own experience as volunteers, their previous work in an agency which utilized volunteers, and any previous experience in supervising volunteers.

✓ **Staff attitudes toward volunteer utilization.**
This would include the opinions of staff about the perceived need for volunteers, and any fears or recommendations about what jobs would be appropriate or inappropriate for volunteers. It would also include staff perceptions of what needs to be done before volunteers are utilized.
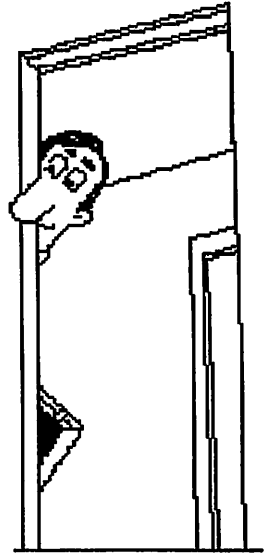
A sample of a *Staff Assessment Survey on Volunteer Involvement* is included in the Handouts section of this training kit. If the findings of the survey indicate a lack of experience with volunteers, then Exercise #2, *Sensitizing Staff as the Scope of Volunteer Involvement and Erasing Stereotypes about Volunteers* is a possible tool for beginning to educate staff.

3. Staff Orientation to the Volunteer Program

Staff need to learn the 'system' for volunteer involvement within the agency. This would include educating them about the following:

✦ Rationale for volunteer utilization
✦ Brief history of volunteer program
✦ Explanation of types of volunteers and jobs
✦ Description of contributions of volunteers
✦ In-depth explanation of role of the staff in all aspects of volunteer utilization

This 'Orientation' might actually be provided in different ways and different times. Part of it might be given to each new staff member. Part might be given as scheduled intervals for staff who wish to begin volunteer utilization. It may be given either in a formal or informal setting, either in a workshop on one-on-one.

It is very effective to include successful staff managers of volunteers and volunteers as co-presenters during these sessions. People relate better to what they see that what they just hear about.

Exercise #3, *Orienting Staff to the Overall Agency Volunteer System*, is designed to help with this process of orientation.

4. Individualized Volunteer Job Creation Process

Ultimately, volunteer retention lies in having jobs which are interesting and rewarding enough that volunteers will really enjoy doing them. No recruitment campaign can compensate for boring volunteer jobs. This means that a process needs to be in place for assisting staff in creating jobs which are meaningful to the staff person (i.e., they really help out) *and* meaningful to potential volunteers. This process will work in three ways:

✓ *Providing Staff with Ideas Prior to Volunteer Utilization*
One way to do this is by giving staff an explanation of their options in utilizing volunteers. For a sample of this method see the *Staff Worksheet on Developing Volunteer Jobs* in the Handouts section. Another method is the 'Chinese Menu' approach in which staff are given lists of types of volunteer jobs to consider. The most 'powerful' list would be that of jobs volunteers currently do for other staff within the agency. The next most powerful would be jobs done in similar agencies.

✓ *Assisting Staff in Creating Jobs in Their Area*
This is where the Volunteer Manager as *Consultant* is essential. Exercise #4, *Helping Staff Develop Meaningful and Workable Volunteer Jobs*, is designed to assist with this element.

✓ *Helping Staff Continue to Develop Innovative Jobs*
The job development process is never-ending. New ideas should be continuously provided to staff.

Among the ways to do this are:

✦ *Talent Advertising:* disseminating notices of

"Hmm...sounds like a job for Superman."

volunteers who have recently joined the agency with particular skills or expertise.

✦ *Success Stories:* highlighting examples of innovative usage, often best done by showing the 'success' that staff have had in achieving some new goal or solving some problem through the involvement of volunteers

✦ *Job Upgrading:* utilizing scheduled evaluation sessions of volunteers to re-examine assignments and re-shape the job to take into account the growth and development of the volunteer.

5. Early Monitoring of Volunteer Placements

Initial assigments of volunteer should be viewed as temporary and experimental. It is a bit irrational to assume following a 30-minute interview that you *know* where this volunteer will be most effective. It is far better to give a temporary assignment, with a review scheduled for 30 days later. During this time the volunteer can conduct a 'test drive' of the job and of the agency, and determine if it matches their needs. The agency (in the person of the staff member who works with the volunteer) can see if the volunteer has the qualifications and commitment required by the job. The volunteer manager can see the the volunteer and the staff person have those essential elements of *fit* that will be essential to a mutually productive working relationship. The experience of this intial 'trial period' can then be utilized in 'finalizing' the placement of the volunteer. If changes need to made then it is much better to do them at this early stage than to wait until disaster strikes.

You will also need to monitor the progress of the staff person in providing 'On-the-Job' training for the volunteer. Exercise #5, *Assisting Staff in Designing Training Programs for Volunteers,* is designed to help with this process.

6. Giving Staff Control in Volunteer Management

Once staff become accustomed to the idea of supervising 'their' volunteers, the majority will quickly become quite happy to accept this responsibility. The role of the volunteer manager is to teach them how to do this correctly, particularly insofar as managing volunteers is different from managing paid staff, and to assist them staff dealing with problem situations.

Exercise #6, *Working with Staff to Identify Techniques for Effectively Supervising Volunteers,* is designed to assist with both of these elements.

7. Providing Feedback and Recognition.

The final element in a system for staff involvement is continuing to advocate for increased utilization. This includes:

✓ Providing managerial information to staff on quantities and patterns of volunteer utilization.

✓ Showing examples of successful and innovative utilization of volunteers

✓ Implementing rewards and recognition for successful staff managers of volunteers.

What you are trying to create is an overall organizational climate that recognizes and respects volunteer utilization. This means that true recognition should occur *throughout* the agency management process, not just at sporadic events. Including volunteer utilization in overall evaluations of agency accomplishments, or evaluating staff in their profiency in volunteer management, are much more substantive and meaningful indicators than certificates handed to staff on an annual basis and the staff will be well aware of the difference.
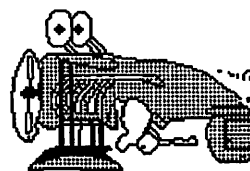
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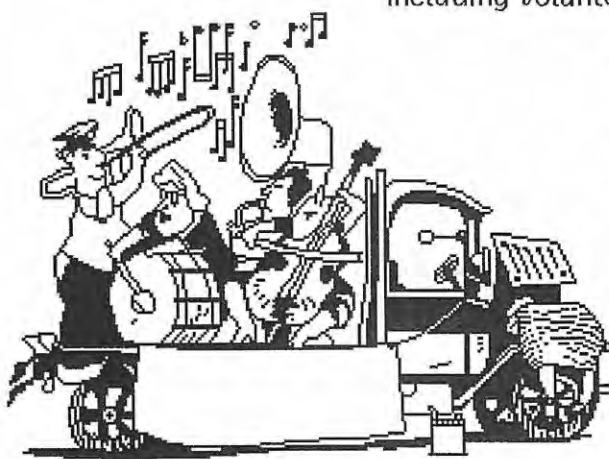
About this Training Kit:

This kit is a stand-alone resource for managers of volunteer programs. Within the kit you will find:

✓ **DISCUSSION** of the theory and practice of teaching staff how to work better with volunteers. This discussion will help you to better understand the need for staff training, the staff's perspective in working with volunteers, and the various approaches and systems that might be utilized in turning staff into more productive volunteer managers. The discussion may even convince you to take a look at how you are doing your own job and show you alternate approaches that might be more effective for both you and your agency.

✓ **TRAINING EXERCISES** that will illustrate and educate staff in different aspects of working with volunteers. These include exercises on sensitizing staff to differing types of volunteers, helping staff recognize their own need for training in volunteer management, assisting staff in developing needed and innovative jobs for volunteers, and learning ways of dealing with problem volunteers.

✓ **HANDOUTS** that will provide you and your staff with additional information and resources. These include sample assessments of staff background and attitudes, worksheets for training exercises, and others.

✓ **OVERHEADS** that you can utilize during your own presentations to staff.

In short, this training kit is designed to provide you with a comprehensive set of resources so that you can immediately begin working to upgrade the skills of the staff at your organization. It will tell you the *why*, show you the *how*, and give you the *what*.

About the Author:

Steve McCurley is an internationally-known trainer and consultant in the field of effective volunteer management. He is currently a partner in **VM Systems**, a management consulting firm. He previously served as Director of Field Services for The National VOLUNTEER Center.

Steve is a former board member of the Association for Volunteer Administration. He has served as a consultant on volunteer program development to the American Association of Retired Persons, the National Association of Partners in Education, the US Tennis Association, the Aid Association for Lutherans and the National Park Service.

Each year he gives workshops to over 15,000 participants from groups as diverse as the American Hospital Association, the Fraternal Congress of America, Special Olympics International, and CBS, Inc. He is the author of over 75 books and articles on volunteer management, including the bestselling basic text, *Essential Volunteer Management*.

Instructions: In the two columns below list the types of work that you currently do in your job or program area. Do not list them in terms of project titles, but instead try to describe the kind of work that gets done. Examples of this might be: "answering information requests on telephone," "giving speeches at community events," "writing newsletter copy," "counseling clients," "maintaining files and records," "updating computer database," etc. If a project (such as producing a newsletter) entails a variety of different types of work (writing, editing, designing, laying out copy, etc), then list all of the parts for which you are personally responsible. You may surprise yourself with the scope of your own activities!

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Instructions: Utilize the space to the right to construct a list of tasks or projects that are not now done in connection with your area of responsibility, but that you have thought about doing. This might include a project for which you have lacked time or resources or a new service for which you lacked the expertise.

You may also think about skills or knowledge that you wished you had acess to but which are not currently available. Could you, for example, make use of a calligrapher, if one were available? Have you always wanted to learn more about a specific computer software package? Use your imagination and construct a wish list....

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

DESIGNING JOBS FOR VOLUNTEERS

Title/Position: _____

Goal of Position: _____

_____

Sample Activities:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

Measures of Success:

1. _____
2. _____
3. _____

Timeframe:

Length of Commitment: _____

Estimated Total Hours: _____

Scheduling: _____

Worksite: _____

Qualifications Sought: _____

_____

_____

_____

Benefits: _____

_____

_____

_____

Supervisor: _____

VOLUNTEER POSITION DESCRIPTION

Potential Volunteer Jobs

In thinking about how and where volunteers might be involved in your area of responsibility, there are several factors you will want to consider. You might, for example, think about creating volunteer jobs through consideration of the following categories of work:

1. Are there areas of work that *staff don't want to do*? This may be because they are not skilled in that type of work, or else simply have a preference to concentrate their effort in another area which better matches their interest and expertise.

2. Are there areas in which there is *too much work* for staff to do alone, and for which we might create volunteer assistants who can extend staff resources? These assistants might work directly with a staff person or could do tasks that benefit all staff.

3. Are there areas in which we can *initiate or extend* services because volunteers would allow us to begin work that we cannot now consider undertaking with current staff resources?

You might also want to consider the creation of volunteer jobs based on the recipients of the service. Consider the following:

- Jobs that are of direct assistant to an individual client (counseling, visitation, mentoring, etc.)

- General assistance to staff (information services, filing, messengers, computer aid, etc.)

- Direct assistance to individual staff (research, training, etc.)

- Outreach (speakers bureau, fundraising, client marketing, etc.)

Volunteer Job Design

Keep the following keys in mind as you think about the specific work you would like the volunteer to do:

1. The work must be meaningful and significant, both to the agency and to the clientele. The work must be needed and should be interesting to someone. This means that your volunteer job must have a *goal* or *purpose* which the volunteer can work to accomplish and can feel good about having achieved.

2. The volunteer ought to be able to feel some *ownership* and *responsibility* for the job. Volunteers are not robots, but must feel that they have some input into and control over the work they are asked to do. This will mean including the volunteer in the flow of information and decision-making within the office.

3. The work must fit a *part-time situation*. Either the work must be small enough in scope to be productively handled in a few hours a week, or else it must be designed to be shared among a group of volunteers.

4. Volunteers must be *worked with*. They should be assigned to staff who are capable of supervising their activities in a productive fashion and providing on-going direction, evaluation, and feedback.

Scheduling the Volunteer Job

The more flexible the timeframe of the volunteer job, the greater the likelihood that we can find someone who will be willing to undertake it. Think about the following as different options for the job:

✓ Are there set hours during the week when the volunteer work will be needed?

✓ Can the work be done in a totally flexible schedule at the discretion of the volunteer?

✓ Could the work be done on evenings or weekends?

✓ Must the work be done on-site at our office?

Assessing Managerial Readiness

The following considerations must also be addressed in thinking about a new volunteer position:

❑ Do you have adequate assigned workspace and equipment for the volunteer?

❑ Have you assigned a supervisor for the volunteer?

❑ Do you need to provide any orientation or training for the staff before they work with volunteers?

❑ Do you have a clear idea of the qualifications we will be looking for in a prospective volunteer?

❑ Do you have a firm description of the goals and objectives of the work to be done, and of the timeframe for the work?

❑ Do you know what training a volunteer would need to do the job in the way we want it done?

❑ Do you have a plan for including the volunteer in our office activities and communications flow?

DEVELOPING A VOLUNTEER POSITION

ACTIONS THAT PROVIDE SUPPORT

✓ **SUPPORT THE INITIAL DECISION TO UTILIZE VOLUNTEERS**

- ☐ Educate staff about agency position supporting volunteer utilization.
- ☐ Answer staff questions about how volunteers contribute to agency mission and strength.
- ☐ Deal with staff fears about volunteer utilization in an honest and open fashion. Do not 'oversell' volunteer abilities.
- ☐ Attempt to reduce any staff anxiety, indicating that decision to utilize volunteers is under *their* control at all times.
- ☐ Work with staff to develop volunteer jobs that are important to staff and immediately helpful to performance of staff duties.
- ☐ Make follow-up calls, both by telephone and face-to-face to talk with staff throughout this decision-making process.
- ☐ Ask for feedback, both positive and negative.
- ☐ Introduce staff to other volunteer users; build a mutual support system.

✓ **HELP MANAGE THE IMPLEMENTATION PROCESS**

- ☐ Assist staff with getting their decision to utilize volunteers approved.
- ☐ Assist staff with paperwork: job descriptions, requests for facilities and equipment, etc.
- ☐ Involve staff in recruiting, interviewing, and training.
- ☐ Counsel staff on key management requirements.
- ☐ Keep in touch and keep staff informed on progress in recruitment.
- ☐ Do not promise any help you cannot deliver.

✓ **DEAL WITH PROBLEMS AND DISSATISFACTION**

- ☐ Empathize with staff feelings.
- ☐ Respond to problems promptly and honestly.
- ☐ Continue to anticipate concerns and expectations. Be alert for what you are *not* being told.
- ☐ Reinforce the anticipated benefits.
- ☐ Never attempt to force staff usage; withdraw volunteers and deal with the problem, then seek to re-introduce usage.
- ☐ Make sure you know what is *really* wrong.

✓ **ENHANCE THE RELATIONSHIP**

- ☐ Be available.
- ☐ Arrange for continued personal communication.
- ☐ Do not wait for staff to come to you – check for problems and approach *them*.
- ☐ Facilitate open, candid communication.
- ☐ Maintain high quality volunteer referrals.
- ☐ Assist staff as problems or questions arise.
- ☐ Become a resource for information, help, new ideas, problem solving.
- ☐ Hold staff accountable for good volunteer management.
- ☐ Praise staff for good work, and inform staff supervisors of success.

SUPPORTING STAFF DECISIONS TO UTILIZE VOLUNTEERS

This form is to allow you to provide feedback regarding our utilization of volunteers. Please answer all questions as completely as possible. All responses will be kept confidential.

1. Are volunteers involved in your area of direct responsibility or in your department?

    ❑ Yes   ❑ No   ❑ Don't Know

2. In your experience, are the volunteers in our agency adequately qualified for their positions?

    ❑ Yes   ❑ No   ❑ Don't Know

3. How would you describe the utilization of volunteers in our agency by other staff?

   ❑ Well Utilized
   ❑ Not Well Utilized
   ❑ Generally well utilized, but some poor use
   ❑ Very mixed patterns of utilization
   ❑ Don't know

4. Are the volunteers in our agency adequately trained for their responsibilities?

    ❑ Yes   ❑ No   ❑ Don't Know

5. Do you think our staff has been adequately trained to work with volunteers?

    ❑ Yes   ❑ No   ❑ Don't Know

7. How would you describe the reaction of our clients to our volunteers?

   ❑ Favorable reaction
   ❑ Mixed reaction
   ❑ Unfavorable reaction
   ❑ Don't Know

6. What else should be done to help our staff work better with volunteers?

8. What benefits do you think we have gained from the utilization of volunteers?

9. What problems have we created through the use of volunteers?

10 How has your work load changed as a result of our utilizing volunteers?

   ❑ Increased
   ❑ Lessened
   ❑ Remained the Same
   ❑ Changed Type of Work Being Done

11. How would you describe the assistance you have received from the volunteer department?

❑ Helpful   ❑ Not Helpful   ❑ Don't Know

12. Use the space below to make any comments regarding our use of volunteers, any additions you would like to make to your answers above, or any suggestions you have about how we might make better use of volunteers:

As part of our agency plan to utilize volunteer assistance, we would like for you to complete the following questionnaire. This survey is designed to assess our readiness to utilize volunteers and to determine what we need to do to ensure continued delivery of high quality services to our clientele. All of the information collected will be kept confidential.

Experience with Volunteers

Have you previously worked in an agency which utilized volunteers?

❑ Yes   ❑ No   ❑ Don't Know

Have you previously directly supervised any volunteers?

❑ Yes   ❑ No   ❑ Don't Know

Do you do volunteer work yourself?

❑ Yes   ❑ No   ❑ Don't Know

Assessment of Volunteer Involvement

What is your overall assessment of the desirability of utilizing volunteers at this time?

❑ Would Never Be Appropriate
❑ Not Desirable At This Time
❑ Uncertain
❑ Somewhat Desirable
❑ Very Desirable

What is your overall assessment of our current readiness to utilize volunteers?

❑ Very Ready
❑ Somewhat Ready
❑ Don't Have An Opinion
❑ Mostly Unprepared
❑ Very Unprepared

Are there any areas or types of work for which you think volunteers are particularly needed and suited in our agency?

Are there areas or types of work which you think that volunteers should not do in our agency?

What issues or concerns would you like to see addressed before we utilize volunteers?

What type of training or assistance would you like to receive before you are asked to work with volunteers?

Are there any other comments, concerns, or questions you would like to express about the involvement of volunteers in our agency? Feel free to use the back of this sheet for additional space.

ON VOLUNTEER INVOLVEMENT

Below are some examples of types of volunteer attitudes and problems, ranging from the volunteer who is conflict-oriented to the volunteer who is almost overly friendly. Read the descriptions of each type and select one which illustrates a type of volunteer with whom you are having a problem.

If the problem you are confronting is of a different type of behavior than is listed below, utilize the final category.

The Cantankerous Complainer

Nothing about your agency or your work situation is satisfactory to the Cantankerous Complainer. This individual expresses constant dissatisfaction about everything, including all suggestions that are made toward resolving the difficulty. The Cantankerous Complainer expresses a negative view about everything and everyone and makes it hard for anyone else to feel good about what they are doing.

The Puppydog

The Puppydog is a disorganized but friendly person who is enthusiastic about practically everything, but seems to have no ability to get anything to work correctly. He or she bounces from one thing to another, and never seems to be able to stay on track. They always seems to working, but never seem to be getting anything done. Sometimes the Puppydog may not even realize that things are going badly. The Puppydog is not good at managing his/her own time and is even worse at helping you manage yours.

The Dreamer

The Dreamer is dissatisfied with a service or product because they have their own vision of perfection which is often beyond the reach of anyone or anything. Often blessed with ideas of their own, and very often with good ideas, the Dreamer has a standard of performance that they ask of others which is simply beyond the ability of a system to produce. Sometimes the vision of a Dreamer does not match the vision of the program, in which case problems result as the volunteer lets their own vision override the mission of the program.

The Boss

The Boss only wants to tell people what to do, not help the group of fellow workers reach a cooperative decision or to help do any of the work that is determined necessary. The Boss is all Chief and no Indian, and views his/her primary responsibility as giving orders. If the Boss is not officially put in charge they will go off on their own or seek to undermine the authority of those who are in charge.

The Maybe Later

Like to watch a work assignment disappear? Give it to the Maybe Later and you'll never see it again. The Maybe Later is willing to accept work but seems incapable of completing it in a timely fashion. While not outwardly resistant, they will impede the progress of the group by forcing others to pick up after them or to take over for them.

Your Worst Nightmare

If the type of volunteer you are actually confronting in your organization is not covered in any of the above categories, feel free to write your own description. We affectionately refer to this individual as "Freddy Krueger."

In an effort to supplement the resources of its staff, the Superior Agency has decided that it needs to enter the computer age. You have been designated as the new Manager of Computer Operations for the agency, based upon your ability to handle 'other duties as assigned.' The Executive Director has given you the assignment of developing a plan to ensure that every staff person will have the ability to make *full* and *happy* use of a computer by the end of the year. Your job is to determine the steps which will need to be undertaken to make this happen.

Use the worksheet below to list the things which you will recommend occur to achieve the successful computerization of your agency.

1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

7. _____

8. _____

9. _____

10. _____

11. _____

12. _____

13. _____

14. _____

15. _____

IMPLEMENTING A COMPUTER SYSTEM

INSTRUCTIONS:

1. INDIVIDUALLY CREATE LIST

2. CLASSIFY ITEMS:

B – BEFORE ANYONE GETS A COMPUTER
D – DURING PROCESS OF ACCLIMATION
A – AFTER PEOPLE ARE UTILIZING COMPUTERS

3. COMPARE LISTS WITH OTHERS IN GROUP

INSTRUCTIONS:

1. CREATE LIST OF WORK

2. CLASSIFY ITEMS:
✔ LIKE DOING
✗ DISLIKE DOING

3. EVALUATE CLASSIFICATION: ANY THAT YOU HAVE TO DO YOURSELF?

4. CREATE WISH LIST

5. CLASSIFY AND EVALUATE

VOLUNTEERS VS PAID STAFF

TIME:

JOB PREPARATION
COMMUNICATION

VOLUNTEERS VS PAID STAFF

TEMPERAMENT:

UNDER MOTIVATED
HIGHLY MOTIVATED
OTHER MOTIVATED

Who Are These Guys?

	Definitely a Volunteer				Not a Volunteer
1. An accountant charged with embezzling who accepts a sentence of 250 hours of community service work in lieu of prosecution.	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
2. A teenager enrolled in the Delta Corps who receives an $800 per month living stipend for a 40 hour per week volunteer assignment.	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
3. A mother who becomes leader of a Girl Scout troop because of her daughter's desire to be a Girl Scout. No one else will take the troop, so the mother agrees to serve, but only as long as her own daughter is involved.	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
4. An IBM executive who is granted a year of social service leave with pay to become a temporary staff person with a nonprofit agency.	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
5. A child who assists in setting up booths at a volunteer fair because one of her parents is a volunteer administrator and 'asks' her to help out.	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
6. A teenager who offers to program the computer at a nonprofit agency in order to establish an employment history. After three months she intends to quit and apply for a job at McDonalds.	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
7. The CEO of a local corporation who is volunteer chairperson of the United Way campaign and who delegates all of the work to his executive assistant.	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
8. The executive assistant to the CEO in Question #7.	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
9. A student who is volunteering 40 hours at a Food Bank to fulfill a high school graduation requirement.	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
10. The homeowner who creates a crime watch group to safeguard his own neighborhood.	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
11. The paid staff person who serves on the board of a nonprofit organization in a slot that is reserved for her agency.	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
12. The six-month-old baby who accompanies her parents to visit seniors at a nursing home and lightens the hearts of residents.	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐
13. The six-month-old cocker spaniel puppy who accompanies her owners to visit seniors at a nursing home and lightens the hearts of residents.	1 ☐	2 ☐	3 ☐	4 ☐	5 ☐

ON THE NATURE OF VOLUNTEERING

One of the best ways to debrief and discuss the "Who Are These Guys?" exercise is to recognize that the questions fall into four categories, with each category representing a different value question. It helps in the facilitation of discussion to have participants contrast their responses to one of the questions in a category with their reactions to other examples of that same type of value question.

The basic categories are as follows:

The "Forced" Volunteer

Examples of this category are:

✓ #1, the accountant avoiding a jail sentence
✓ #5, the child of the volunteer administrator
✓ #8, the assistant to the CEO
✓ #9, the student facing a graduation requirement

For each, the issue is whether a person who is being compelled can be considered to be engaging in *voluntary* behavior. In #1, the 'volunteer' is avoiding a jail sentence. In #2, the 'volunteer' is being encouraged by an educational requirement. In #5, a child is 'asked' by her parent to assist with work. And in #8, a person 'volunteers' because it is within 'other duties as assigned' (and, additionally, is also duty for which one is being paid by someone).

The question to pose to staff is whether some degree of "coercion" makes a person something other than a 'true volunteer.' Of interest to comment upon during the discussion is that the most effective technique in volunteer recruitment makes use of this 'drafting' technique. According to the 1990 Gallup Survey conducted by the Independent Sector, 52% of those who 'volunteered' were asked to do so by a friend. How many of those were *assisted* by a little creative emotional blackmail during the appeal?

The "Self Interest" Volunteer

Examples of this category include:

✓ #3, the Girl Scout troop leader
✓ #6, the student creating an employment history
✓ #10, the homeowner starting a crime watch program

In each of these the key question is to what extent activity that has a direct benefit to the participant can be considered 'helping others'.

Discussion of this topic can get quite convoluted. At what point do we draw the line: work that helps me, that helps my family, that helps people in a similar situation, that helps my neighborhood, that helps my community? At what point does altruism become self-interest?

One of the fastest growing areas of the volunteer community is that of self-help groups, who are certainly involved through a personal interest in solving problems.

The "Paid" Volunteer

Examples of this category include:

✓ #2, the New York City teenager
✓ #4, the IBM executive
✓ #7, the corporate CEO (and their assistant)
✓ #11, the staff meeting serving on the Board

The key issue in these, of course, is that each is in fact being directly compensated by *someone*.

Discussion in this category will center on whether it matters that the work is 'done' for free, or simply 'received' without cost to the agency. The definition utilized by the Red Cross on the accompanying overhead is a good example of clarifying this distinction. On the other hand, consider the definition by Susan Ellis and Katherine Noyes, which cites 'without concern for monetary profit'. Under this definition, can our examples above be considered as 'volunteers'? What about the insurance agent who volunteers in the community to meet potential clients?

Other common examples of this issue exist within federal volunteer programs, such as Foster Grandparents, and in many local volunteer firefighter units. One question you might pose is whether people's answers would change if the recipients of the payments or stipends were low-income individuals who could not otherwise volunteer without such support. Another is whether responses would change if the volunteers were working full-time and could not seek other paid employment.

The "Unconscious" Volunteer

Examples of this category include:

✓ #12, the baby
✓ #13, the puppy

Each has an interesting characteristic, the lack of ability to 'decide' to volunteer on their own.

At issue in this category is whether a volunteer must exhibit 'informed consent' before they can be considered to have 'decided' to volunteer. If participants reject the idea that volunteering might be undertaken without this knowledge, ask why it is quite natural to allow other 'unconscious' donations as a matter of course. No one, for example, asks a donated computer whether it 'intended' to be contributed...

Finally, you might show staff the overhead containing Dr Ivan Scheier's 'loose' definition and ask whether it will suffice. If nothing else you will have shown staff that the world of volunteering is much larger and much more complicated than they ever imagined!

WHO ARE THESE GUYS?

FORCED VOLUNTEERING
SELF INTEREST VOLUNTEERING
PAID VOLUNTEERING
UNCONSCIOUS VOLUNTEERING

Volunteer is one who introduces himself into matters which do not concern him and who does or attempts to do something he is not bound to do.

Mock v. Sears, Roebuck and Co. 427 N.E. 2d 872

Teaching Staff to Work with Volunteers, 1992

A Planetary Definition of Volunteering:

1. The activity is relatively uncoerced.

2. The activity is intended to help.

3. The activity is done without primary or immediate thought of financial gain.

4. The activity is work, not play.

Dr Ivan Scheier
Exploring Volunteer Space

A Red Cross volunteer is an individual who, beyond the confines of paid employment and normal responsibilities, contributes time and services to assist the American Red Cross in the accomplishment of its mission.

Volunteer 2000 Study

Teaching Staff to Work with Volunteers, 1992

TO VOLUNTEER IS TO CHOOSE TO ACT IN RECOGNITION OF A NEED, WITH AN ATTITUDE OF SOCIAL RESPONSIBILITY AND WITHOUT CONCERN FOR MONETARY PROFIT, GOING BEYOND ONE'S BASIC OBLIGATIONS.

ELLIS & NOYES
BY THE PEOPLE:
A HISTORY OF AMERICANS AS VOLUNTEERS