

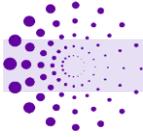


Supervising Volunteers Handouts

Volunteer Impact Leadership Training Series

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Supervising Volunteers

Guide to Handouts

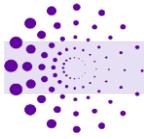


- H-1: Learning Objectives and Key Concepts
- H-2: Supervisory Tasks
- H-3: Skills of Good Supervision / Personal Qualities of a Good Supervisor
- H-4: Tips to Strengthen Coaching Skills
- H-5: Uniqueness of Volunteer Supervision and Examples of Communication with Volunteers
- H-6: Volunteer Performance Reviews
- H-7: Volunteer Performance Issues
- H-8: Procedure for Releasing a Volunteer
- H-9: Suggested Reading Resources

Attachments

- Attachment A: How to Develop a Performance Appraisal
- Attachment B: Volunteer Performance Reviews - Process
- Attachment C: Volunteer Self-Assessment Form
- Attachment D: Sample Volunteer Performance Review

All the information from the PowerPoint presentation is included in the handouts.
To follow the handouts along with the PowerPoint slides,
note the handout number on the lower right corner of the PowerPoint (“Handout 1” etc.).



Handout 1 Learning Objectives and Key Concepts

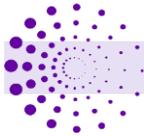
Learning Objectives

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

1. Understand the role of a volunteer supervisor
2. Identify differences between supervising staff vs. volunteers
3. Learn key volunteer supervision skills
4. Understand potential value of mutual performance review process
5. Discuss problem solving volunteer performance issues
6. Recognize options for dismissing a volunteer

Key Concepts

1. Staff and volunteers who are asked to supervise volunteers must clearly understand the organization's expectations of them in this role.
2. People who are competent supervisors of salaried or non-salaried staff share key skills and characteristics.
3. Although principles of supervision for volunteers and staff are very similar, there are some special aspects of volunteer supervision.
4. Depending on formality, size and style of the organization, type of job, etc., supervision systems and methods can be quite varied.
5. Successful performance reviews provide for a periodic opportunity for communication between a person who assigns work and the person who performs it.
6. There are constructive rules for approaching difficult volunteer performance issues and for the process for dismissing a volunteer.



Handout 2 Supervisory Tasks

Key Concept #1

Staff and volunteers who are asked to supervise volunteers must clearly understand the organization's expectations of them in this role.

Excellence in Supervisory Skills

Excellent supervisory skills are not measured by your personal accomplishments but by the success of those who report to you.

Categories of Supervisory Tasks - Agency Expectations of Supervisors

1. Preparation / Orientation of Volunteer to a Position

- Work to provide a welcoming and inclusive work environment; build relationship with volunteer to understand their needs
- Staff review and provide the job description
- Job responsibilities reviewed with volunteer
- Introduce volunteers and staff that will be working together
- Prepare work area for volunteer
- Explain supervision system and where to address questions
- Discuss relevant risk management issues, policies and procedures
- Provide training for volunteers

2. Ongoing Support and Resources

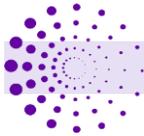
- Training
- Coaching
- Appreciation
- Materials/information

3. Reporting Requirements

- Individual and overall volunteer hours
- Impact of volunteer work
- Reports to Manager of Volunteers (and others)
- Periodic written volunteer reviews
- Others

4. Evaluation

- Annual (or other timeframe) performance review of a volunteer in your program
- Annual written evaluation of volunteers' work within the organization, your department, etc.
- Others



Handout 3

Skills of Good Supervision / Personal Qualities of a Good Supervisor

Key Concept #2

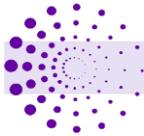
Competent supervisors of both staff and volunteers share key skills and characteristics.

Skills of Good Supervision

Delegation	Communications
Planning	Confrontation
Coaching	Problem Solving
Listening	Evaluation/Review
Conflict Resolution	Climate Setting
Recognition	Sharing Knowledge
Trainer/teacher	Setting Standards
Team Builder	Others
Cultural Competency	

Personal Qualities of a Good Supervisor

Trustworthy
Consistent
Models Good Behavior
Positive Attitude
Empowering
Supportive
Self-Reflective
Empathetic
Others



Handout 4 Tips to Strengthen Coaching Skills

Coaching is a way of treating and managing people. Strengthen your use of effective questions to build awareness and responsibility in others.

Awareness

- The gathering and clear perception of the relevant facts and information, and the ability to determine what is relevant.
- Self-awareness is recognizing when and how emotions or desires distort one's own perception.
- Sharpening our input receptors, tuning our senses and engaging our brain.

Responsibility

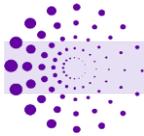
When we truly accept, choose or take responsibility for our thoughts and our actions, our commitment to them rises and so does our actions.

Coaching questions compel attention for an answer, focus attention for precision and create a feedback loop.

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Sample Questions

- What do you want to (need to) accomplish?
- What will you do to get that done?
- What is your timeline? Or when are you going to do it?
- What obstacles might you meet along the way?
- Who needs to know?
- What support do you need?
- How and when are you going to get that support?
- What other considerations do you have?
- Rate on a 1 to 10 scale the degree of certainty you have that you will carry out the actions. What prevents it from being a 10?



Handout 5

Uniqueness of Volunteer Supervision and Examples of Communication with Volunteers

Key Concept #3

Although principles of supervision for volunteers and staff are very similar, there are some unique aspects of volunteer supervision.

Uniqueness / Differences in Volunteer Supervision and Supervisory Methods

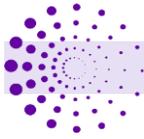
- Part-time basis
- Working at a distance
- Volunteers more free to leave if dissatisfied
- Good supervision may be new experience for volunteer
- Confusion over “Who is my supervisor?”
- Supervision may take more time for affiliation volunteers
- Difficult to confront a volunteer
- Volunteers may need more flexibility

Key Concept #4

The level and type of supervision varies depending on the volunteer opportunity.

Examples of Ways to Communicate with Volunteers and Supervise

- Specific appointments at designated times
- Open time for scheduling appointments
- Monthly group or individual meetings
- Supervision by “walking around”
- Regular reports/phone calls to and from volunteers working off site



Handout 6 Volunteer Performance Reviews

Key Concept #5

Successful performance reviews provide for a periodic opportunity for communication between a person who assigns work and the person who performs it.

Definition

Volunteer Performance Review, part of an organization's continuous supervision and feedback system, provides an opportunity for communication between a person who assigns the work and the person who performs it, to discuss what they expect from themselves and each other, and how well those expectations are being met.

Essential Elements of a Volunteer Performance Review

1. Volunteers learn about review system when they enter the organization. They must be apprised of the feedback system, including the system for performance review. It should be described and delivered in positive, empowering terms.
2. Mutuality is the key. It is a time for both the volunteer and the supervisor to share their experience with one another in the organization.
3. Performance review should be based on previously agreed upon goals, standards, job description, tasks, deadlines, available resources, intervening circumstances, etc.
4. No surprises. The performance review should not have major surprises when ongoing supervision, conflict resolution, etc., have taken place.
5. Depending on the size and culture of the organization, the process can be formal with special forms or done in a more informal session.
6. It is best to gradually include current volunteers who have not previously been reviewed. You may start out with a self-assessment system as they begin to buy into the benefits.
7. It is best if the performance review is scheduled for a specific time. Otherwise, it will most likely be put off.

Important Considerations Regarding Performance Reviews

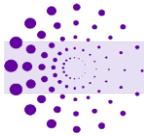
Volunteer performance reviews can take many different shapes. The type of performance review (or even the name you give to the performance review process) may vary from one volunteer to another.

Consider offering volunteers a choice between a more formal review of their experience with the organization or an informal conversation about how things are going and how the organization can better support them.

Benefits of Performance Reviews

- Volunteers are important and held accountable
- Volunteers want success and feedback
- A time to express appreciation to volunteers
- Time for re-negotiating working agreement

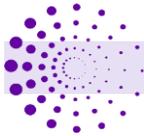




- Plan for ways to improve volunteer performance in the future (e.g., training)
- Volunteers can express concerns and “escape” an unfavorable situation
- Supervisor can share concerns and dismiss, if warranted

Challenges of Volunteer Performance Reviews

- Difficult for larger organizations to connect with every volunteer for performance reviews
- Time consuming for staff doing reviews
- May not be possible or make sense for one-time or short-term opportunities
- May be perceived as overbearing or unwelcoming if done too formally
 - May be particularly true for volunteers who regularly help informally in their communities (i.e., would a neighbor evaluate your performance after you helped shovel their sidewalk?)
 - Could put up barrier for volunteers with anxiety or volunteers who worry about their value to the organization



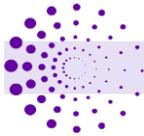
Handout 7 Volunteer Performance Issues

Key Concept #6

There are constructive rules for approaching difficult volunteer performance issues and for the process for dismissing a volunteer.

Rules of Constructive Confrontation

- Don't attack personality; focus on performance.
- Be specific. Do your homework and have specific examples of the behavior to share.
- Keep conversations private.
- Make intervention timely but do not approach until you are calm and rational.
- Reiterate expected behavior using "I" not "you" language.
- Get agreement on the problem. Allow volunteer to share own perspective.
- Determine a shared commitment for finding a solution to the problem.
- Agree on a mutual plan to solve the problem.
- Arrange for a follow-up meeting to determine if the issue is resolved or needs an alternate solution.
- Document the conversation.



Handout 8 Procedure for Releasing a Volunteer

Dismissal

When all options fail, or when an infraction is extremely serious (one listed in policies as cause for immediate dismissal), it may be in the best interest of the organization and the volunteer to dismiss the volunteer.

Procedures for Releasing a Volunteer

1. Discuss the need to release a volunteer with your supervisor to have his/her support.
2. Send official warning letter to volunteer including specific information of what behavior needs to change and by when.
3. Provide assistance to help volunteer change the behavior – and document changes.
4. Give probation with special goals.
5. Dismissal if goals are not achieved.

Alternatives

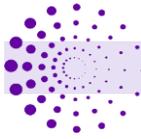
- Re-assign to new position in your organization.
- Train/coach or re-train.
- Provide a more motivating climate if volunteer has lost interest in the work/mission.
- Give information on where and how to find a better-suited volunteer position in another organization.
- If age or disability prohibits carrying out the position, retire the volunteer with style.

Tips for a Dismissal System

- In orientation, volunteers should receive agency policies which include information on dismissal, suspension, and grievance procedures.
- With only a few clear exceptions, a volunteer should not be dismissed without an investigation to make certain that policies were violated or performance was well below standard. (Can suspend while investigating.)
- Dismissal should be handled fairly and with utmost diplomacy. Don't apologize. Allow for appeals process.
- Provide notification to staff, clients and other volunteers that the volunteer will no longer be working at the organization.

Steps for Dismissal

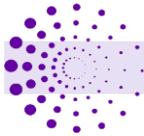
1. Procedures that address standards of volunteer conduct, grounds for dismissal, and written policies dealing with problem situations should be covered during orientation and training with the volunteer. Often it is the same policy that salaried staff have in their personnel policies to cover probation, suspension, and termination.
2. If alternatives have been explored and tried and none have been successful, a standard process should be initiated:



- **Forewarning/notice** - The volunteer is notified by his/her supervisor that there is some serious concern about his/her behavior. You may need to suspend the volunteer while an investigation is underway. You would very rarely fire a volunteer on the spot, unless there is obvious danger to clients and the organization if the volunteer continues the behavior.
- **Investigate** to determine whether the volunteer has, indeed, broken the rules or if there is adequate evidence that s/he should be dismissed from the position. During this phase, it is important to determine whether the organization's management/staff could be linked to this problem, in addition to the inadequacies of the volunteer's behavior. Assuming that alternative solutions to dismissal have been explored, and that there is clear evidence for dismissal, the dismissal process should commence quickly.

The Release Meeting

- Meet in private. Be quick, direct, and absolute in announcing your decision. There should be no further discussion at this point.
- Allow the volunteer to resign to "save face" and to help prevent the volunteer from spreading bad PR into the community.
- Notify all others in the system who need to know that the volunteer will no longer be carrying out that role.
- Keep written records of:
 - Deficiencies in performance.
 - Attempts to correct the behavior (counseling, coaching, warnings, evaluation forms given to volunteer).
 - Any signed documentation from those who can verify the behavior.
- Follow-up with a letter to the volunteer reiterating the decision and sharing departure information.



Handout 9 Suggested Reading Resources

Websites

For sample performance reviews, see resources in the “Members Only” Section of the MAVA Website at www.mavanetwork.org

For a listing of resources on volunteer supervision, see Energize, Inc. at https://www.energizeinc.com/how_to_volunteer_management/supervision

Articles/Videos

Supervision

Bacharach, Yael, “5 Essential Skills for Successful Coaching,” 2013, <http://www.inc.com/yael-bacharach/five-essential-skills-for-successful-coaching.html>

Charity Village, “Discipline and Dismissal: Making the best of a difficult situation,” 2014, <https://www.youtube.com/watch?v=FvEiG81c78k>

Ellis, Susan J. and Steve McCurley. “How Many Supervisors Does It Take to Screw in A Volunteer?” *e-Volunteerism: The Electronic Journal of the Volunteer Community*, Vol. IV, Issue 1, Oct-Dec 2003. <http://www.e-volunteerism.com/quarterly/03oct/03oct-points>

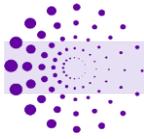
Elliston, Sarah. “Integrity – The Guide Post to Volunteer Relationships.” *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. III, Issue 1, October-Dec 2002. <http://www.e-volunteerism.com/quarterly/02octdec/elliston3a>

Frankovelgia, Candice, “The Key to Effective Coaching,” *The Key to Effective Coaching*, Forbes, <http://www.forbes.com/2010/04/28/coaching-talent-development-leadership-managing-ccl.html>

Krueger, Justin, “Dealing with Difficult Volunteers,” <https://www.youtube.com/watch?v=O4yzTOOIqIQ>

Performance Reviews

Graff, Linda L. “Performance Evaluation.” Chapter 11 in *Best of All: The Quick Reference Guide to Effective Volunteer Involvement*. Dundas, ON: Linda Graff & Associates, Inc., 2005. Order at <http://www.energizeinc.com/store/5-217-E-1>



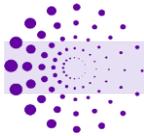
Books

Graff, Linda L. "Supervision and Ongoing Placement Support." Chapter 9 in *Best of All: The Quick Reference Guide To Effective Volunteer Involvement*. Dundas, ON: Linda L. Graff & Associates, 2005. Available for order from Linda Graff and Associates (\$35 hard copy, e-book or book on CD with introductory video) <http://www.lindagraff.ca/books.html#BestOfAll> or through https://www.energizeinc.com/store/best_all (\$20 e-book only)

Lee, Jarene Frances with Julia Catagnus. *What We Learned (the Hard Way) About Supervising Volunteers*. Philadelphia: Energize, Inc., 1998. Available for order (\$15 e-book only) https://www.energizeinc.com/store/what_we_learned_hard_way_about_supervising_volunteers

McCurley, Steve and Rick Lynch. *Volunteer Management: Mobilizing all the Resources of the Community*, revised ed. Kemptville, ON: Johnstone Training and Consultation, Inc., 2011. Available for order (\$29 e-book only) https://www.energizeinc.com/store/volunteer_management_mobilizing_all_resources_community

Wilson, Judith and Michelle Gislason, *Coaching Skills for Nonprofit Managers and Leaders – Developing People to Achieve Your Mission*. Jossey-Bass, 2010. Available for order from Amazon (\$46.48, used copies also available) <https://www.amazon.com/Coaching-Skills-Nonprofit-Managers-Leaders/dp/0470401303>



Attachment A

How to Develop a Performance Appraisal

It is important that each organization designs a form which best meets its needs. The performance appraisal needs to reflect what is important to the position and to the organization.

When designing the performance appraisal, the aim is to rate the volunteer on factors such as:

- Job performance
- People skills
- Responsibility and motivation

There are two basic approaches to performance appraisal questions.

1. One approach is to make a list of traits that are important to the work of the volunteers. For example, for “people skills”, the rating could be on factors such as:

- Adheres to confidentiality policy
- Relates well to clients, staff and volunteers
- Is courteous and tactful
- Cooperates with team of staff and co-workers
- Is well groomed and adheres to dress code

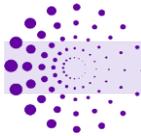
The rating system could include levels such as:

1. Superior - Exceeds requirements
2. Excellent - Accomplished tasks
3. Fair - Tasks not fully accomplished
4. Unsatisfactory - tasks not accomplished

2. Another approach is to rate the volunteer on accomplishments of the position duties. To do this, you make a simple form that has a column for the position duties and a second column for a rating on how the volunteer performs on the duties. If you make this form up, then for each volunteer position you just change the duties listed.

You need to determine pertinent factors and a rating system that is appropriate for your organization and volunteers.

It is important that the volunteer and staff or lead volunteers discuss any performance review and agree to the next steps, particularly if the job is not being accomplished. Numerous factors, both individual and organizational, may be affecting a volunteer's low productivity or morale.



Attachment B

Volunteer Performance Reviews - Process

Before the Session

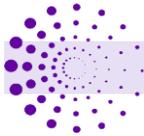
1. Have volunteer fill out (think about) his/her self-assessment based on a series of questions.
2. As supervisor, be prepared for the performance review session by reviewing the job description, goals and standards agreed to and evaluate performance versus job expectation for the time period being reviewed.

During the Session

1. Together, review the previously agreed upon job expectations.
2. Share some positive feedback and give appreciation for service.
3. Ask volunteer to share their self-assessment and respond appropriately.
4. Give your assessment of the volunteer's performance based on some format such as Outstanding, Good, Satisfactory, and Unsatisfactory.
5. Discuss any barriers they experienced in carrying out their position or job and plan for how they might be overcome in the future.
6. Discuss future plans for the volunteer in the organization. (e.g., positions, goals, etc.)

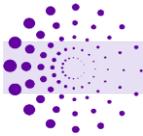
After the Session

Write up a report and follow up on any action plans or agreements made.



Attachment C
Volunteer Self-Assessment Form
(Sample Questions)

1. Do you feel you are reaching the expectations listed in your job description (e.g., goal setting, etc.)?
If not, share your reasons for the gap.
2. Was the estimated time to accomplish your volunteer work realistic?
Comment.
3. Did the organization provide adequate orientation, training, supervision and resources for you to accomplish your job?
Comment and offer suggestions for improvement.
4. What have been your greatest satisfactions on the job?
5. What have been your greatest disappointments on the job?
6. Were other volunteers and staff receptive and appreciative of your volunteer work?
Comment.
7. What were your areas of growth in your volunteer job?
8. Over-all I would rank my performance as:
 - Superior, exceeding expectations
 - Excellent, met expectations
 - Needing improvement, did not meet expectations
 - Comments to explain above answer
9. What type of work and time commitment do you desire for next year? (i.e., same position, new challenges, departure...)
10. Other comments, suggestions, etc.



Attachment D
Sample Volunteer Performance Review

Name of Volunteer: _____

Period covered: _____

Date of evaluation: _____

Volunteer Position(s): _____

Evaluation done by: _____

1. Performance on main duties of the position
(From Volunteer Position Description)

	Excellent	Good	Satisfactory	Needs Improvement
a.	4	3	2	1
b.	4	3	2	1
c.	4	3	2	1
d.	4	3	2	1

2. Overall performance

	Excellent	Good	Satisfactory	Needs Improvement	Does Not Apply
a. Relationship with other volunteers	4	3	2	1	0
b. Relations with staff	4	3	2	1	0
c. Relations with clients	4	3	2	1	0
d. Meeting commitments on hours and task deadlines	4	3	2	1	0
e. Initiative	4	3	2	1	0
f. Flexibility	4	3	2	1	0

