GETTING STARTED

Establishing A Volunteer Program in Your Agency

139336

DEPARTMENT OF ALCOHOL AND DRUG PROGRAMS

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The rise and expanded role of volunteerism in the alcoholism field reflects the convergence of several factors occurring in California and across the nation. Reductions of federal, state, and local fiscal resources have made the use of volunteers attractive to county agencies as well as to non-profit agencies. The continued and increasing prevalence of alcohol abuse and the problems associated with this abuse place additional burdens on treatment and prevention programs. Lastly, growing awareness and sophistication regarding the most effective use of volunteers have evolved through a trial and error process.

While volunteerism is not a new phenomenon, its use in alcohol service agencies in many ways remains formative--its full potential still unrealized. Recognizing the usefulness of volunteers represents only the first step. The more difficult process and the one most directly concerning the California Department of Alcohol and Drug Programs (DADP) is helping interested agencies establish volunteer programs. Through training and technical assistance grants, DADP has actively promoted the use of volunteers in alcohol treatment and service agencies.

Evaluation, Management and Training (EMT) Group, Inc., a Sacramento-based management and training consulting firm, was selected by DADP to assist them with this training and technical assistance effort. As part of this contract, EMT is producing a series of Technical Assistance Resource Handbooks. This volume, "Getting Started: Establishing A Volunteer Program In Your Agency," is part of the series.

This handbook is based on the works of many individuals in the volunteer field, as well as our experience working with numerous California alcohol services providers over the past several years. We are appreciative of the feedback and response you have given us about the volunteer program training we have provided during this period. This information has enabled us to be more sensitive to your needs and constraints.

We look forward to hearing from you, and we wish you success in implementing your volunteer program.

Acknowledgements

The authors acknowledge the staff of the California Department of Alcohol and Drug Programs who have worked closely with EMT throughout the draft of this manual. Specifically, we thank Anne Sheahan, Jackie Taylor, Michael Cunningham, and Noralee-Jennings-Bradley who provided both guidance and support throughout the eight years of EMT's work in the volunteer program development area.

In addition, thanks to EMT Group, Inc., staff, especially Evelyn Boehm and Deborah Williams who have contributed significantly to the word processing of this high quality product.

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"Getting Started: Establishing A Volunteer Program In Your Agency" is designed to help California alcohol service providers develop a volunteer program and make existing programs more effective. Its easy-to-reference handbook format presents step-by-step directions for conceptualizing, planning, implementing, and managing a volunteer program.

If your agency is planning to develop a volunteer program, this handbook will be an excellent resource. Each chapter explains the four essential steps for a successful program:

- *Chapter One -- Conceptualizing: Why Have A Volunteer Program? --* will help agency administrators and staff explore their needs for a volunteer program. In two sections, we examine ways volunteers can augment agency services, and discuss the pros and cons of establishing a volunteer program. The questions posed and issues raised should promote lively discussion among staff that will, in turn, lead to a well-informed decision about whether or not a volunteer program would be a necessary and feasible addition to your agency.

- *Chapter Two -- The Planning Phase --* will guide your agency through three important planning stages: (1) determining the need for a volunteer program; (2) conducting a needs assessment to determine how volunteers could best serve your agency; (3) and implementing the planning process once your agency decides to actually establish a volunteer program. The step--by--step preparation advocated in this chapter should help staff realize that while a volunteer program is a desirable addition to your agency, a successful program requires commitment and planning prior to its implementation.

- *Chapter Three -- Implementation --* will help your agency translate its plans into action by taking four important steps: (1) preparing job descriptions for volunteers; (2) developing a recordkeeping system to monitor the new volunteers; (3) creating a volunteer recruitment process; and (4) defining volunteer screening and selection procedures. These implementation steps should encourage staff to carefully design volunteer job descriptions and recruit competent volunteers who will augment your agency's existing services.

- *Chapter Four -- Program Management --* will assist administrators with four important and interrelated managerial functions: (1) creating a volunteer orientation and training program; (2) developing effective supervisorial procedures; (3) designing formal and informal ways to recognize volunteer contributions; and establishing a regular evaluation component to measure the

program's success. Careful implementation of these managerial tasks will enable agency administrators and staff not only to motivate and retain enthusiastic volunteers, but gather useful data that may ensure the program's success.

The four steps of this complete process are summarized in the overview presented in Exhibit 1-1.

Each chapter of the handbook is designed to be comprehensive and complete by presenting specific information about one of the four steps necessary to create and maintain a volunteer program. A summary sheet is included at the end of each part to review important highlights and present a series of activities. Worksheets are included to provide practical exercise to assist you in developing or revising a volunteer program.

You have a choice when using this handbook: you may decide to read and use this entire handbook to plan and actually implement a volunteer program; you may use only selected sections of this handbook to meet the needs of an existing volunteer program in your agency; or you may use the handbook to guide you in your decision making process.

EXHIBIT 1-1
OVERVIEW OF THE PROCESS OF DEVELOPING A VOLUNTEER PROGRAM

Conceptualizing: Why have a volunteer program?
The process of conceptualizing why to have a volunteer program will help the agency explore agency and staff needs, considerations, and concerns.

Planning
The process of identifying the program goals and objectives, a guide for implementation.

Implementation
The process of taking action based on a plan of goals and objectives.

Job Design
Identify jobs and develop written job descriptions.

Recordkeeping
Develop a system to monitor and document volunteer efforts.

Recruitment
Develop a targeted recruitment process.

Screening/Selection
Determine the suitability and interests of potential volunteers and match them to volunteer jobs.

Program Management
The process of taking action based on a plan of goals and objectives.

Orientation/Training
Introduce the organization to the volunteer and provide volunteers with the information and experience they need to do their volunteer job.

Supervision
Provide the support and direction to do the volunteer job.

Recognition
Recognize the volunteers' efforts.

Evaluation
Monitor the results, identify the accomplishments and problems of the volunteer program.

CHAPTER ONE

CONCEPTUALIZING -- WHY HAVE A VOLUNTEER PROGRAM

CONCEPTUALIZING -- WHY HAVE A VOLUNTEER PROGRAM

Chapter One sets the stage for developing a volunteer program in your agency. Section 1, "Why Have A Volunteer Program?", identifies some of the many roles performed by volunteers in alcohol service agencies. Section 2, "Volunteer Use--Objectives and Misconceptions Examined" presents some major objections and misconceptions associated with having a volunteer program in a direct service agency. It is important reading for programs that have a volunteer component and those planning to establish one.

Understanding appropriate roles for volunteers, as well as some limitations and potential obstacles associated with volunteerism, can help you develop a successful and productive volunteer component within your program.

SECTION 1   WHY HAVE A VOLUNTEER PROGRAM?

Volunteers -- "non-paid staff" who augment paid staff by providing specific services -- are a vital component of many agencies. These individuals provide three types of volunteer service:

- *Direct Service* -- individuals and group members who provide direct services to program clients on a regular or occasional basis;

- *Indirect Service* -- individuals and group members who provide indirect services may provide (1) support services, (2) specialized skills (i.e. bookkeeping), or (3) fundraising; and

- *Board of Directors* -- individuals who serve on the Board of Directors for non-profit agencies.

This handbook explores the viability of using volunteers who provide direct and indirect services. Developing an effective Board of Directors is another topic in this series of manuals, titled Building Better Boards.

Why Use Volunteers?

Just why are volunteers such a valuable component to many agencies? Most local alcohol programs are familiar with the obvious reasons for using volunteers in their agencies:

- Volunteers contribute human resources far exceeding volunteer program administrative cost.

- The right volunteer in the right job allows the program to do things it otherwise could not do.

- Volunteers serve an effective community outreach and public relations role, lending credibility to program functions precisely because they are volunteering their time.

- Volunteers provide a source of new skills and enthusiasm.

- Volunteers may provide successful role models to recovering alcoholics served by the program.

When considering these factors, one might be easily convinced. Others, however, may feel they do not have time to coordinate volunteers; or they may be concerned about some common problems stereotypically associated with volunteer programs. Those who need further convincing should consider the other persuasive reasons for pursuing volunteerism that are examined in this section.

First of all, VOLUNTEERS CAN MEAN SURVIVAL! No one needs to be reminded that fiscal resources are in short supply and competition for dollars is getting tougher. Nor is it any less apparent that personnel costs represent the single largest item in most program budgets. Volunteers are a logical response to the squeeze being felt by many agencies. Volunteers are intended to supplement, not supplant, regular paid staff. Using volunteers should not threaten individuals holding paid staff positions. Conversely, volunteers augment staff resources and services.

Many programs that have suffered budget cuts or are about to experience cutbacks have had to ignore their fears. Sensitive questions about using volunteers for functions presently or previously performed by paid staff members may be replaced by the more realistic query, "Will we be able to perform these functions at all?" The plain truth is that most programs need all the help they can get. If your agency is committed to effective volunteer program management, then tasks that may be voluntarily performed probably should be assumed by volunteers.

Second, remember that VOLUNTEERS NEED YOU! The reasons for volunteering range from (1) wanting to serve one's community by working for a non-profit organization; (2) searching for more meaningful ways to spend leisure time; (3) returning service to the agency that provided recovery support and treatment; and (4) donating time between jobs or while unemployed and seeking practical experience for countless personal reasons. Alcohol programs needing counseling, clerical, bookkeeping, receptionist, or other assistance should appeal to both the self-interest and altruistic motivations of prospective volunteers. Volunteers may need you as much as you need them.

What Can Volunteers Do?

While the above reasons are persuasive, a review of the many ways agencies can use volunteers is even more convincing. Volunteers can function effectively in many capacities within an alcohol service program if (1) the clients accept them as legitimate participants, (2) the staff accept them as peers, and (3) the agency supports its volunteers through a well-defined volunteer program. Some of the specific advantages volunteers can provide an alcohol service agency were identified by the U.S. Department of Health, Education, and Welfare (HEW--currently , the Department of Health and Human Services):

- Enrichment of service in quantity.

- Clearer and more positive relations between the agency and its clients and the community of which they are a part.

- Development of informed advocates for alcoholic clients-- their worth, their needs, their potential-- and for the social and economic value of the alcoholism agency.

- A broader base of understanding of alcoholism as a disease and acceptance of alcoholic men and women as people who are suffering from an illness which can be treated.

- Further opportunities for prevention, case finding, and early diagnosis by educating new community groups.[1]

Moreover, as the manual outlines, additional benefits will arise that are specific to the agency's operation:

- Staff and volunteers can support staff in work assignments, allowing them to also participate in training opportunities.

- Voluntary contributions can supplement the budget to provide needed items, such as recreational equipment, temporary lodging for clients looking for living quarters, and clothing and accessories appropriate for clients preparing for employment.

- Interpretation by knowledgeable volunteers resulting in zoning board action that is favorable to opening a new halfway house.[2]

There are a number of services that can be performed by volunteers in your agency. Volunteers will require some training and supervision, but are well worth the time expended. Volunteer activities may include:

- *Clerical and secretarial work* -- fulfilling typing, filing, receptionist duties.

- *Volunteer program coordination* -- either assisting or directing the volunteer program.

- *Counseling alcoholic clients and their families* -- direct counseling or co-counseling with clients.

- *Referral* -- escorting clients to other agencies and assisting in the referral process.

- *Speaking before community groups* -- assisting with the educational process and volunteer recruitment.

- *Staffing* -- helping to staff drop-in centers, crisis telephone lines, or other community resources.

- *Transportation* -- helping clients get to and from counseling sessions.

Some volunteers provide specialized skills either not available or under represented on the agency staff. Such volunteer jobs might include the following professionals:

- *Clergy* -- for counseling clients and their families, training, and education.

- *Attorney* -- for legal counseling or consultation to administration.

- *Nurse* -- for advising clients about health problems.

- *Psychologist* -- for consultation on evaluation techniques and counseling.

- *Public relations specialist* -- for helping with annual reports, publicity, fund raising, and community relations.

- *Social Worker* -- for counseling and consultation.

You might consider using service groups (i.e., Rotary clubs, Kiwanis) churches or businesses for certain assignments. These groups have the advantage over individual volunteers: If someone is unavailable for a certain assignment, the group may either replace him or recognize to complete the assignment.

However volunteers are used, the experience can be rewarding for both program sponsors and volunteers. You owe it to all concerned to at least assess the possibilities for starting or expanding the use of volunteers in your agency. (See Worksheet #1)

SECTION 2   VOLUNTEER USE--OBJECTIONS AND MISCONCEPTIONS EXAMINED

Over the years, volunteerism has developed its own mythology. Stereotypes about volunteers and volunteer behavior have become part of our social consciousness. Some of these beliefs evolved through misunderstandings about what motivates the "giving" person. Others, like the volunteering middle-class housewife, are outdated but still persist. Further, misconceptions arise when program administrators fail to implement sound volunteer management procedures. Whatever the source of myths or misconceptions, it is important for staff to identify and discuss them. This section examines some major objections and misperceptions about volunteer participation in alcohol service agencies.

Objections To Volunteer Services

Several years ago, the U.S. Department of Health, Education, and Welfare (HEW) produced a manual on volunteer services for alcoholism program directors. A key point was the need for consensus among staff about having a volunteer program:

> *Volunteers can function effectively only if the alcoholic clients accept what they offer as a legitimate part of treatment and rehabilitation; staff accept them as partners and peers; and the governing body supports the agency's responsibility to recruit, educate, and assign them to service. If any of the three groups-- client, staff, board-- rejects or resents volunteers, the program cannot succeed and, indeed, should not even begin.*[3]

The manual further explains that objections must not only be anticipated; they must also be discussed by agency staff so appropriate solutions can be determined. We suggest alcoholism program directors or volunteer coordinators use these identified objections and suggested responses as focal points for staff discussions about their volunteer program.

Objection 1

Volunteer use is a "cop-out" and will eventually result in reduced government support. Volunteers will relieve government agencies of their funding responsibility.

> *Response:* Other health and social agencies involve volunteers without suffering budget cuts. In fact, there is evidence in other fields-- such as mental health and mental retardation--that programs begin to attract new and much-needed public funds at the very point when volunteers become involved. Remember, decision- makers may listen more responsively to volunteers than to agency heads because they have no vested interest and reflect a wider constituency.

> Or, as the HEW document concluded:

> *If there is any correlation between volunteer services and governmental responsibility for a given cause, it is contrary to that postulated by the naysayers. The more volunteers become involved, the more government at every level sits up and takes notice.*[4]

Objection 2

Alcoholic men and women resent volunteers as do-gooders, and look upon voluntary gifts as charity.

Response: The HEW Manual takes a firm position on this issue:

Not even the most negative objector makes such a point about A.A. Twelfth Stepper's service to a sick alcoholic. The field universally accepts the concept that the A.A. member in 'carrying the message' to a suffering sick alcoholic is primarily helping himself. Chapter 7 of A.A.'s Big Book provides guidelines for working with others and stresses the 'selfish' nature of such help: 'Helping others is the foundation stone of your recovery. . . . Actually, he (the sick alcoholic) may be helping you more than you are helping him. Make it plain he is under no obligation to you. . . .

Although nonalcoholic volunteers do not conceptualize their service to others in the same terms as A.A. members, they too engage in it for personal reasons -- to dispel loneliness or boredom or a feeling of uselessness; to meet new people and make new friends; and in working with others, to learn more about themselves. Other people may work as volunteers to test the service with the intention of possibly seeking a professional career in the alcoholism field; to utilize and refine valued skills that might otherwise atrophy; to overcome feelings of alienation; to learn more about alcoholism and its victims in order to help; an alcoholic relative or friend; or to resolve anxieties about personal drinking practices. Others volunteer to achieve the feeling of gratification that accompanies useful and helpful activities.

The above are all good reasons for volunteering, and the volunteer who does not 'get' as much as he 'gives' will almost invariably drop out. It is as true for the nonalcoholic volunteer as for the A.A. Twelfth Stepper that the alcoholic beneficiary of his service may be providing more help than he receives and 'is under no obligation'.[5]

Furthermore, as we increasingly recognize the impact of alcoholism on the family members, coworkers, and friends of the alcoholic, these significant others will increasingly seek ways to provide support to alcoholics in recovery.

The HEW document then identifies two practical proposals to counteract negative reactions to volunteers among alcoholic clients:

1. Staff encourages recovering alcoholic men and women to volunteer for services in other agencies.

2. A special effort be made to recruit volunteers from the same socio-economic, racial, and ethnic communities from which their clients come.

Objection 3

Volunteers required considerable training before they can work effectively with alcoholic clients and their families. Agencies are not staffed to provide this level of support and training.

> *Response:* Direct service agencies generally do not have the resources, fiscal or staff, to design and implement an educational program. However, there are resources available to program administrators that should be considered. First, the State alcoholism agency-- the Department of Alcohol and Drug Programs (DADP)-- has contractors available to assist with this effort. Through technical assistance contracts, the Department provides on-site assistance, general training sessions, and written materials. Second, local Volunteer Centers often conduct training sessions on volunteer program management for either minimal or no fees. They will also help with recruitment. Third, the local affiliate of the National Council on Alcoholism, is often an excellent source of information on volunteer program management. Fourth, a volunteer training committee composed of knowledgeable people representing both the alcoholism field and education can be of great assistance. Last, other community-based agencies that use volunteers on an ongoing basis (e.g., Red Cross, hospitals) can explain how and when they do their training.

Objection 4

Confidentiality and anonymity about clients and client records is jeopardized by volunteer involvement in the program.

> *Response:* All volunteers should be required to sign a confidentiality agreement with the agency. Many programs limit or prohibit access to client files by volunteers. The HEW manual made the following points concerning client anonymity:

The concept of anonymity applies not only to the diagnosis of alcoholism but to membership in A.A. More and more prominent people are telling the world that they are alcoholics. Such acknowledgement is a blow against stigma, fresh evidence that alcoholism is a 'respectable' illness and not a disgrace.

Very few, if any, alcoholic patients recover without at some time acknowledging to themselves and their families, as well as to the treatment staff, that they are alcoholic. If they have an opportunity to be honest with volunteers without experiencing instant rejection, they may feel more confident and comfortable about living in the broader community.

Objection 5

Members of A.A., Al-Anon, ACA groups, and Alateen are willing and welcome to help alcoholic clients and their families; the alcoholism agency does not need "outside volunteers."

Response: As the HEW manual suggests, this objection reflects a prejudice that ignores the contribution nonalcoholic people have made and are making in the field of alcoholism.

There is ample and growing evidence that qualified volunteers can be recruited who have not suffered personally from alcoholism. Certainly among professionals in the field there are nonalcoholic nurses, clergymen, counselors, and others who 'have a feel' for alcoholic people and are as effective as alcoholic staff members in relating to them; and so it is among volunteers.

There are still agencies in the alcoholism field which maintain 'closed shops' -- for alcoholic people only. There may even be an occasional agency which discourages A.A. members from contact with clients, rationalizing that A.A. philosophy is too different from their professional treatment approaches. To help alcoholic clients live and stay sober in a society which is 95 percent non-alcoholic, such agencies must consider opening their doors to all caring and helping people, regardless of sex, age, race, educational level, or previous experience with alcohol.[6]

Misconceptions About Volunteers

In addition to these specific objections, there are a number of general misconceptions concerning volunteer use. If you expect to have a successful and effective program, such misconceptions need to be discussed and understood by staff. Kathleen Brown, a noted volunteerism trainer, identified some major misconceptions in her book, *Keys to Making a Volunteer Program Work*.[7]

1. *Volunteers Represent a Free Service--* Volunteers are not free. It takes time and valuable resources to train, supervise, and evaluate volunteers. Often, there are additional "real" costs associated with operating a volunteer program: supplies, telephones, office equipment, etc.

2. *Volunteers Cannot Be Fired--* Volunteers can and should be fired if they cannot or do not perform their jobs at the level agreed upon by the volunteer and program administrator. The key to maintaining this control is developing a well-defined job description outlining duties and responsibilities and identifying a specific staff person to oversee the volunteer.

3. *Volunteers Create Management Problems: They Are Undependable And Cannot Be Held Accountable--* This is undoubtedly the major misconception about volunteers. In fact, volunteers are as responsible as the agency that recruits, trains, assigns, and supervises them. Or, as the HEW manual explains:

> *If the agency develops a firm and rational structure with volunteer job descriptions, time sheets, acceptable working conditions, pleasant interpersonal relations, and all the other elements of healthy personnel practices and if the agency accepts the volunteer program as an ongoing process of recruitment, education, assignment, supervision, and evaluation, and provides the leadership necessary to keep the process rolling, then most volunteers will take their jobs as seriously as employed staff. Those few who fail to do so can be gently helped to transfer to different assignments or, if necessary, to resign.[8]*

In addition to these misconceptions concerning volunteer services, Brown identifies a larger issue that is often overlooked by program administrators: What do volunteers want from the program?

Staff sometimes don't understand that volunteers need challenge, social interaction, direction, feedback, and appreciation. Some seem unaware that people who volunteer their time want something back from the organization. Thus the volunteer program manager must often spend time in awareness training for staff (e.g., helping staff recognize the needs of volunteers, the costs of a volunteer program, and the degree of commitment required). Staff members should understand what is involved before they agree to take on volunteers.[9]

It is important, then, that staff discuss the advantages and disadvantages of volunteer use within the agency. This discussion will explore a very basic issue: Do the advantages outweigh the disadvantages? Or, as Judy Rauner, a volunteer program consultant, writes:

If the advantages aren't of greater value, effective management may not be what is needed. Perhaps there shouldn't be any volunteer involvement at all.[10]

Rauner suggests the following three methods of soliciting staff attitudes concerning volunteers:

1.   Plan a structured meeting where a listing of advantages and disadvantages of volunteer use is presented to the group for comment and discussion.

2.   Plan a meeting where staff are encouraged to brainstorm about the advantages and disadvantages of having volunteers. Use these issues as a starting point for a more in-depth discussion. (See Worksheet #1)

3.   Establish space on a bulletin board to record reasons for having a volunteer program.

As Rauner, Brown, and other noted volunteerism trainers suggest, both the positive and negative points about volunteer involvement must be discussed. The positive factors identified in such a meeting provide reinforcement, making it worthwhile for staff to dedicate the required time and energy for operating the volunteer program. The negative factors identified in this process alert program managers about possible remedies for positive change in program operations.

CHAPTER ONE SUMMARY SHEET

Things to Remember

1. Volunteers can provide valuable contributions to your program if their positions and roles are well-defined.

2. Volunteers are intended to supplement, not supplant, regular paid staff members.

3. Volunteers may need you just as much as you need them.

4. Agency managers and staff members must be familiar with the objections to, and misconceptions about, using volunteers.

5. Volunteers can provide two broad categories of service for your agency: direct and indirect services. Volunteer Board members provide a third category, in policy making.

6. If program clients, staff, or Board members resent or reject the use of volunteers, the program cannot succeed.

7. Staff must meet to discuss their objections to, and misconceptions about, volunteers, as well as the advantages and disadvantages of using volunteers within the agency.

Things to Do

1. Have a staff meeting to discuss the pros and cons of having a volunteer program. Include any volunteers already working in your agency. Use the experience to:

   ● Get staff to express their reaction to using volunteers, both pros and cons.

   ● Dispel some objections and misconceptions surrounding the use of volunteers in alcohol service agencies.

   ● Determine whether the staff and program have a real need for, and a commitment to, a volunteer program.

   ● Identify possible jobs for volunteers.

2. Meet with any volunteers already working in your agency to discuss their attitudes about the jobs they are performing and the paid staff with whom they work, ways their experience with your agency could be improved, and suggestions for changes in the overall volunteer program.

3. Complete Worksheet #1.

4. If staff agrees you need a volunteer program, consider establishing a steering or advisor committee to define program goals, assess needs, and determine the level of human and financial resource commitment.

WORKSHEET #1
Why Have Volunteers?

Goal: To identify advantages and disadvantages of having volunteer involvement.

Suggestions: With a group from your agency (including program Director, Volunteer Coordinator, paid/unpaid staff), brainstorm on a large sheet of flip chart paper the advantages of having a volunteer program and on another sheet of flip chart paper the disadvantages of having a volunteer program

Advantages	Disadvantages

These questions can be used as discussion starters:

1. Are there enough advantages to make having volunteers worthwhile?

2. Can any of the disadvantages be reduced or eliminated by changing ways the volunteer program is managed?[11]

WORKSHEET #1 (Example)
Why Have Volunteers?

Goal: To identify advantages and disadvantages of having volunteer involvement.

Suggestions: With a group from your agency (including Program Director, Volunteer Coordinator, paid/unpaid staff), brainstorm on a large sheet of flip chart paper the disadvantages of having a volunteer program.

Advantages	Disadvantages
Volunteers enable expanded services to be offered.	Time and energy are required of the manager and other staff to involve volunteers (training, supervision, etc.).
Response to individuals needs is possible.	The same people always do all the work and "burn out".
Money is raised for the organization.	Volunteers' expectations are not always met.
Issues and people are given support.	Program quality suffers if volunteer jobs are not done well.
Volunteers are informed about the organization and the needs that exist.	Paid personnel are uncomfortable and/or threatened by volunteer involvement.
Volunteers share their knowledge and experience to benefit the organization.	Volunteer commitments are often short term and there is constant turnover.
Greater amount of time, talent, "person power" is available.	Paid staff are more accountable.
Our purpose and goals are explained by volunteers -- good public relations.	Volunteers terminate their commitment if unexpected personal needs arise.
Funding source requirements are partially met by having volunteer involvement.	Legal requirements of "unofficial" personnel mean added liability coverage needed.
Volunteers bring enthusiasm and positive motivational orientation to the agency.	Volunteers may expect to be hired when paid positions open up.
	A variety of duties are required, not just busy work.
	With more people involved, there are more interpersonal relationships to consider.

CHAPTER TWO

THE PLANNING PROCESS
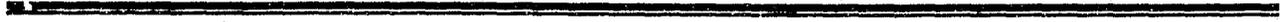
CHAPTER TWO

THE PLANNING PROCESS

If, after reading Chapter One, you have decided volunteers can make a valuable contribution to your agency, you need to begin the planning process. Careful planning will be one of the most important steps you take in managing your agency's service delivery. Lack of adequate planning is a major reason for the failure of many volunteer programs within the first few years of operation.

As we saw in the previous sections, volunteers can contribute in numerous and positive ways. Now you must get ready to plan your volunteer program. This chapter discusses steps to prepare your organization for program implementation. Each step is discussed in three separate sections: Determine the Need for a Volunteer Program; Conduct a Needs Assessment; and Implementing the Planning Process.

Because of the limited personnel resources and the pressures of everyday service needs, you may feel a need to severely reduce the planning process. This chapter also provides alternatives to the formal planning process which are less demanding and can still produce results.

SECTION 3   DETERMINE THE NEED
FOR A VOLUNTEER PROGRAM

The successful development of a volunteer program requires complete support from administrative and line staff. One way to achieve the necessary level of commitment and involvement is to organize a volunteer planning committee to supervise the implementation of the volunteer component. Agencies with an existing volunteer program can use the volunteer committee to review its operation and overall effectiveness.

At a minimum, invite staff to a meeting, in order to:

- Determine the need for a volunteer program;

- Define agency goals;

- Collect data on which to base recommendations (e.g., conduct a needs assessment);

- Develop a management plan; and

- Maintain agency commitment to the volunteer concept.

The steps and desired outcomes for undertaking this process follow.

1. *Determine the need for a volunteer program.* At this point, the staff must determine whether *there is a readily observable need for volunteers and if this can be translated into clearly defined jobs for volunteers.*

   If they are uncertain about the answer, they must conduct a needs assessment to explore fully the potential for volunteers in your agency. Staff, Board members, clients, and even community members can provide input for this assessment. The needs assessment can be accomplished either formally, through written survey and data collection process, or informally through an open discussion and forum. Such an exercise will greatly benefit your agency's volunteer program development process in several ways. First, it will involve your entire staff, a key to developing a successful volunteer program. Second, the process will identify clues to identify specific jobs for volunteers and develop job descriptions which will, in turn, serve as the foundation for a well-planned recruitment effort.

2. *Define Agency Goals.* Before providing input about possible volunteer roles, it is important to firmly define and understand agency goals and objectives. There are numerous ways in which volunteers could augment program activities; however, if these are contrary to the agency's overall goals, they will be of little value or create conflict of interests.

3.   *Collect Data.* Data collection identifies agency needs, potential community-based resources, and literature that could help establish a new program service. The most important component of this initial data collection effort involves conducting the needs assessment discussed above and establishing contacts with local volunteer resources.

4.   *Develop a Management Plan.* After completing the tasks identified above, you should seriously consider developing a sound management plan to oversee the program's implementation. Section 5 discusses the steps for preparing such a management plan.

5.   *Maintain Agency Commitment to the Volunteer Concept.* A last, but essential element of the assessment process is maintaining agency commitment to the volunteer concept. By scheduling regular meetings about implementing the volunteer program, you will be able to maintain the initial enthusiasm for the program.

Our experience with scores of California alcohol service providers strongly supports the involvement of staff to facilitate the successful implementation of a volunteer program. Too often, the volunteer program never quite gets off the ground due to *unrealistic* expectations about how long the process will take. Plan on taking three months or even more time.

SECTION 4   CONDUCT A NEEDS ASSESSMENT

Understanding your agency's current level of service delivery is essential to developing and identifying volunteer program activities. This determination is most appropriately accomplished through a needs assessment which examines the agency's overall structure and operations and forms the basis for decisions concerning possible use or alternative use of volunteers.

The checklist in Exhibit 4-1 will help determine your willingness to support a volunteer program. In addition, remember to address the questions in the first two sections of this manual. Because a variety of potential needs exists in any agency, the assessment must consider the following levels of need:

- Administrative needs
- Staff-related needs
- Client-related needs
- Community-related needs

Administrative Needs

Program administrators and Board members represent an important source of information concerning program needs. At a minimum, the administrator should consider the following issues:

- What are the agency's most important goals?
- What services do (did) volunteers perform?
- What level of volunteer effort does (did) this require?

- What additional services could be provided if volunteers were available or if they were given different job assignments?

- What role can the volunteer play to help the agency and community better achieve agency goals?

- What is preventing the agency from expanding or making use of volunteers?

It is important for responses to the issues to be specific.

EXHIBIT 4-1
Checklist – Are You Ready for a Volunteer Program?[12]

Before starting a volunteer program, your staff should meet, discuss, and answer the following twelve questions. If volunteers are already part of your agency, use the list to check if their participation is being fully utilized.

1. Is there a readily observable need for volunteer services, and can this be translated into clearly defined jobs for volunteers?

2. Are we clear enough about our professional tasks so that we may understand our own roles in relation to the volunteers?

3. Can we budget the staff time which must be allocated for effectively implementing a volunteer program?

4. Have paid staff members at all levels thought through the proposal to utilize volunteers, and will they support the volunteer activities?

5. What are our expectations of the level of volunteer performance? Are we prepared for uneven service and employee turnover that almost always accompanies such programs?

6. Will we be able to assign responsibility to one central staff person to supervise volunteer activities?

7. Are we willing to make supervision and training available for volunteer staff?

8. Are we ready to accept the volunteers as colleagues and to appropriately recognize their services?

9. Will we welcome volunteers from all social classes so that our volunteer group will truly represent the total community which supports us?

10. Is there readiness to use volunteer participation at every appropriate level of agency service including policy making?

11. Are we prepared to modify agency programs in light of volunteer contributions and possible enrichment of programs?

12. Will we help the volunteer recognize implications of the program for the whole community? Will we be comfortable with and able to encourage the social action of volunteers which should come from enlightened participation?

Staff-Related Needs

The determination of staff needs can occur through formal interviews, structured questionnaires, informal conversations, or group discussion among all staff. The latter method is particularly recommended. The National Institute on Alcohol Abuse and Alcoholism's (NIAAA) volunteer program development guide suggests that group discussions adopt the "jobs we are doing" and "jobs we are not doing" strategy outlined below:

1. Each staff member lists all of the job activities performed in the last three days, preferably in the order of their frequency. Staff may list up to 25 or 30 specific items, such as answering the phone, driving clients to hospitals, arranging client appointments in other agencies, and home visits.

2. Each staff member then lists all of the jobs he or she would like to do for clients--services for which there is rarely or never enough time.

3. Activities on each of the lists are potential jobs for volunteers.

4. Discuss each listed activity with the staff to determine whether or not

   • The job has genuine significance;

   • The job enriches or improves services to the client;

   • Having a volunteer do the job would relieve staff of nonprofessional or lower priority but necessary duties;

   • The activity would augment professional-level services;

   • The job is appropriate for volunteers to perform;

   • The job would be satisfying to a volunteer; and

   • Staff would like to consider having a volunteer do the job.[13]

Another suggested format for assessing staff needs is to assemble staff for a brainstorming session to identify all jobs which could be delegated to volunteers. Elicit a priority listing of the top three possible jobs identified and ranked by the staff. Each of the top three volunteer jobs could then be discussed by staff as outlined in number 4 of the previous forms for eliciting staff-related needs.

Client-Related Needs

Client needs are the basis of all program planning and development. Discussions with clients can potentially determine new areas requiring services, identify gaps in current service, and, where appropriate, can assess the particular advantages and disadvantages associated with volunteer service delivery. The NIAAA guide also suggests the list of potential volunteer jobs identified by staff be submitted to recovering or graduate clients for their reactions and input.

Community-Related Needs

While community needs are more difficult to assess, they produce both potential sources for program expansion and information on community needs. Through either formal or informal interactions with community leaders, board members, and volunteers, it is possible to define and determine community needs. For example, newspaper articles about teenage alcohol abuse could help a program expand its services through volunteering to include a hot line, recreational programs, prevention, and outreach efforts targeted for teenagers.

SECTION 5   IMPLEMENTING THE PLANNING PROCESS

When implementing your volunteer program, the following three areas should be included in your planning process:

1.   *Staff Relations* -- Ensure volunteers fit into the organization in a constructive way.

2.   *Program Management* -- Define responsibility for supervision and administration; devote sufficient time and resources to make the program work; involve staff in planning.

3.   *Program Development* -- Design and use instruments to evaluate the program and implement any necessary corrective actions.

This section will consider each area in some detail.

Staff Relations – Preparing Staff for Volunteers

It is important to avoid a situation where volunteers create dissension among paid staff members. Without preparing staff or involving them in implementing the volunteer program, problems can arise:

- Staff may feel threatened that their roles or advancement opportunities will be diminished.

- Volunteers may be treated as second-class workers, undermining the program.

- Staff may expect too much of volunteers, or may not seriously consider their potential contribution.

To avoid these problems, it is necessary to define roles, discuss with staff appropriate ways to relate to volunteers, and set realistic expectations for volunteer performance.

Additionally, paid staff must understand their role in relation to volunteers. You can help with this understanding by comparing the volunteer jobs and professional role: Do areas of responsibility overlap? How should professionals and volunteers divide duties and responsibilities when working on the same tasks?

Paid workers should accept volunteers as colleagues and lend support to their activities. Discuss this at a staff meeting, make agency policy clear, and obtain the commitment of paid staff.

Volunteer service can be uneven, and turnover is to be expected. In addition, you and your staff cannot expect the same full-time commitment from volunteers as you do from yourselves. You can and should work with each volunteer to agree on a commitment and level that is mutually acceptable which will be reviewed periodically. However, you should be aware that problems with volunteer commitments do occur and you are somewhat limited in dealing with these performance failures. Discuss this with your staff and anticipate how you will deal with unreliable volunteers if and when they are encountered.

Program Management – Preparing a Management Plan

Planning is best approached by drafting a management plan, similar to those adopted by new businesses. Important elements of a plan include:

- Designating responsibility for supervision and administration;

- Committing resources to make the program work; and

- Defining goals and setting objectives, milestones, and a timeframe for program implementation.

Supervision and Administration

Identifying one central person with responsibility for the program can contribute to success. Centralized responsibility for the volunteer program will facilitate interaction with volunteers, staff, clients, and others in coordinating the program.

Assign this responsibility carefully and recognize the special skills required to handle the job. Such a person may be the volunteer coordinator (paid or volunteer position). As an alternative to a paid or non-paid volunteer coordinator, your agency may elect to assign volunteer program management responsibilities to another staff member. Whoever it is, he/she should develop the management plan as early as possible, and consider involving other staff in the form of a volunteer program committee.

In addition to designating a person to supervise the effort, we suggest programs involve staff through directed meetings or form a volunteer management planning committee to assist with implementing the volunteer component. Staff an help the volunteer coordinator develop the management plan, prepare job descriptions, and decide operational policies and procedures for the volunteer program.

Resources

It may be difficult to commit fiscal resources to the volunteer program. Resources may be quite limited, giving a volunteer program the appearance of an expensive and unnecessary gamble. Despite the risk, the payoff can be well worth the expense.

You may need to devote the following resources to the program:

1. Staff time for coordination, training, and supervision;
2. Reimbursement for volunteers' out-of-pocket expenses;
3. Support for recognizing volunteers;
4. Insurance costs for volunteer liability coverage;

5. Recruitment advertising expenses; and
6. Office space for the volunteers.

Except for office space and staff and equipment time, (especially if you plan to have a paid volunteer coordinator) none of these costs are substantial; but they do add up. Your management plan should have a budget allowing for such costs. Do not forget to estimate the value of the benefits you expect from the program; no doubt they will far exceed the costs! (See Worksheet #2)

Goals and Objectives

Defining goals and objectives is an important element of your management plan. Your volunteer program's goals should be broad statements of general intent and direction. Your program's objections, on the other hand, should be measurable, time specific, achievable, and compatible with the goals. Exhibit 5-1 provides an example of a volunteer program goal and objective. If you articulate what you want to accomplish with specific measurable objectives, you have something concrete to guide you in achieving your goals (Worksheet #3). Some ways to be specific and measurable include:

- Define the number of each type of volunteer you would like to have on your personnel roster.

- Define the number of days per month of volunteer service you would like to have.

- Establish a monthly target for new contracts for perspective volunteers.

- Construct a spending plan tied to your budget for developing your volunteer program.

All these objectives and others you develop should be expressed in terms of timing: "By 'x' month we will have 'y' volunteers on our roster." This gives you the basis for evaluation, our next area of discussion.

Program Development -- Responding to Changes

Good managers know that sometimes things work out as planned; and other times, a mid-stream correction is necessary. The only way to ascertain if major changes are necessary is by conducting a structured evaluation.

Your management plan can serve as the basis for evaluation. Are you meeting your objectives and deadlines for the quantity, quality, and type of volunteer service? What do clients and staff members say about volunteers' performance and the value of their services? Is the program paying off in a cost/benefits sense?

As you prepare your organization for voluntrers, create a dynamic atmosphere. Let staff know that if original plans do not work, changes *will* be made. Set a definite review point during which all staff will take a good hard look at how volunteers are used, recruited, selected, trained, and supervised. There is also an important corollary to evaluation: You may discover that volunteers have allowed you to deliver previously unavailable services or to enhance the delivery of services you traditionally provide. Thus, you may want to alter agency programs and services to make the best use of volunteer resources.

More and more, alcohol service agencies are realizing volunteers are a desirable, even essential, addition to their organization. Deciding to start or expand a volunteer program requires commitment; the first evidence of such commitment is taking time to prepare for volunteerism. Planning for smooth staff relations, effective program management, and meaningful evaluation *can* make a difference.

EXHIBIT 5-1
Program's Goals/Objectives

Goal: Develop a volunteer program to enhance community awareness about the problems of alcohol and an awareness of our program.

Objectives: (Fill in blanks with target dates)

1. Involve staff in planning or establish planning committee by _____.

2. Designate a person to coordinate our volunteer program by _____.

3. Determine the needs and roles to be performed by volunteer staff through a needs assessment program by _____.

4. Identify community needs that might be best served by volunteers by _____.

5. Prepare job descriptions for all volunteers, based on results of the program and community needs assessment process by _____.

6. During the next two months become more knowledgeable about principles of volunteer program management (e.g., attend training sessions, review selected readings, visit another agency with a volunteer program).

7. Develop appropriate record keeping systems to manage our volunteer program by _____.

8. Develop recruitment plans for the volunteer staff based on a thorough job design program by _____.

9. Develop training curriculum, supervision and training plan for volunteers by _____.

10 Recruit _____ volunteers by _____.

11 Train and place _____ volunteers by _____.

12 Evaluate the volunteer program by _____.

CHAPTER TWO SUMMARY SHEET

Things to Remember

1. Involving staff will enable your agency to carefully plan a volunteer program, supervise, and evaluate the program, and maintain agency commitment to the volunteer concept.

2. Conducting a needs assessment based upon staff, board member, client, and community member input contributes to a better understanding of how volunteers can assist your agency.

3. Implementing a successful planning process requires program management to do the following:

   ● Carefully prepare the staff for the introduction of volunteer service;

   ● Draft a management plan that designates supervisory and administrative responsibilities for volunteers, commits the resources necessary to make the program work, and defines appropriate and feasible program goals and objectives; and

   ● Create a flexible plan that allows for changes based upon regular, structured evaluations.

Things to Do

1. Carefully determine how to involve staff and current volunteers in the development, supervision, and review of the volunteer program.

2. Design a needs assessment process that allows for staff, board member, client, and community member input. Based upon its results, identify specific jobs that volunteers could perform for your agency. (Worksheet #6)

3. Meet with your staff to determine the need for, and commitment to, a volunteer program. This meeting should be different from that suggested in Chapter One of this manual. That initial meeting should be devoted to discussing the pros and cons of a volunteer program; the next meeting or series of meetings should be held *after* some need has been identified and it has been decided that a volunteer program is desirable. This meeting should be specifically directed to obtaining staff commitment to the concept of volunteerism as well as accepting volunteers as colleagues.

4. Create a planning process that prepares your staff for the use of volunteers; include a well-developed management plan that incorporates methods for supervision and administration, adequate commitment of resources, and definitions of goals and objections. (Worksheets #2, #3, #4, and #5)

CHAPTER TWO SUMMARY SHEET
(Continued)

Things to Remember   *Things to Do*

5. Designate one central person to be responsible for coordination of the volunteer program. Determine whether that position should be filled by a paid or volunteer staff member. Once selected, make sure the coordinator helps develop the management plan.

6. Determine how staff can be included to assist the volunteer program coordinator in developing the management plan, preparing job descriptions, and deciding program policies and procedures.

7. Write a list of resources needed for a volunteer program. Include these costs in the management plan. Then, estimate the value of benefits expected to accrue from the program and compare these with the anticipated costs. Make the results available to your staff.

8. Set clear goals for the program's direction and measurable, specific objectives. Be sure to design the goals and objectives with flexibility in mind as they may have to change as the program evolves and is evaluated.

9. Review other literature about volunteer program development. Identify local volunteer support services such as local Volunteer Centers, ^XU (Directors of Volunteers in Agencies) groups. Contact other agencies with volunteer programs (i.e. Red Cross, county social service agencies, nonprofit agencies).

Administrative Implications of a Volunteer Program

Projected Staff Time

Is the agency prepared to allocate 1 hour of staff time for 2 to 3 hours
of volunteer time in the beginning of the program?   _____

Is the agency prepared to allocate 1 hour of staff time for 15 to 20
hours of volunteer time when the program is in full operation?   _____

Is the agency prepared to require participation in monthly
discussion/orientation sessions during the early months of the program?   _____

Is the agency prepared to allow compensatory time for overtime staff
participation in volunteer training and supervision?   _____

Projected Administrator Time

Is the administrator prepared to continue to participate directly in
volunteer program planning?   _____

If yes, how many times per month?   _____

If no, who would represent the administrator?   _____

If no, who would take measures to clarify the coordinator's position,
responsibility, and authority to staff; clarify lines of communication;
create channels for the coordinator to be informed of staff needs?   _____

If no, who would communicate with the volunteer coordinator on the
same regular and formal basis as with other staff?   _____

If no, who would appear at volunteer training sessions and recognition
gatherings as often as six to eight times a year?   _____

Program Leadership

What special qualifications are necessary in a volunteer coordinator
for this agency?   _____

What position will the coordinator have in the agency (line, staff, reporting to whom?)

How many hours a week will be required to direct the program during the first year?

Will this position be paid or unpaid?

If paid, what salary is contemplated and how does this relate to regular staff salary levels and structure?

Will the volunteer coordinator be full-time or part-time?

If part-time, how many hours per week?

If full-time, will the coordinator be expected to do other things for the agency?

Is the agency willing to allocate work time travel and registration fee funds for the coordinator to attend at least two or three training workshops a year to improve leadership skills?

Will time be set aside to discuss the volunteer program with staff at such meetings?

Logistic and Budget Support

Will the volunteer program coordinator have secretarial support? Full-time? Part-time?

Can space (a desk, meeting room, and so on) be set aside for volunteer use?

Which of these items must be budgeted for, and how will this be done (e.g., absorb in regular budget, solicit funds, look for in-kind donations and volunteer services)?

    Mailing
    Office supplies
    Telephone
    Recruitment/training materials
    Typing
    Reimbursement of volunteer work-related expenses
    Other

WORKSHEET #3
Program Goals/Objectives

PROGRAM GOAL
Goals must be broad statements of general direction. They must relate to a general plan or course of action and be consistent with the agency's purpose. Volunteer Program Goals:_____ _____ _____ _____

OBJECTIVES
Objectives are statements that are time/date specific, measurable, achievable and compatible with the goal(s) of the program. Volunteer Program Objective(s):_____ _____ _____

WORKSHEET #4
Schedule of the Planning Process,
Implementation, and Evaluation
of the Volunteer Program[15]

	Year	Month	Planning	Implementation	Evaluation
1.					
2					
3.					
4.					
5.					
6.					
7.					
8.					
9.					
10					
11.					
12					
13.					
14.					
15.					
16.					
17.					
18.					
19.					
20.					

Purpose: Identify responsible person and due date for major project activities.

Year	Month	Planning	Implementation	Evaluation
1	1	Identify planning committee		
2	2	Conduct needs assessment/analyze		
3	2	Develop goals and objectives		
4	2-3	Appoint volunteer coordinator		
5	3	Develop management plan		
6	2-3	Identify volunteer jobs		
7	2-3	Write volunteer job descriptions		
8	4	Develop supervision plan		
9	4	Prepare record-keeping systems		
10	4	Develop application process		
11	5	Plan screening, recruitment, training, evaluation, and recognition		
12	6	Distribute recruitment materials		
13	6		Recruit and screen volunteers; train staff who will supervise	
14	7		Select volunteers	Evaluate initial training
15	7		Assign volunteers to jobs, supervision begins	
16	8		On-the-job training	
17	9			Evaluate initial job performance and satisfaction

WORKSHEET #5
Assignments

Purpose: Identify responsible person and due date for major project activities.

	Task	Responsible Person	Date
1.			
2.			
3.			
4.			
5.			
6.			
7.			
8.			
9.			
10.			
11.			
12.			

WORKSHEET #5 (Example)
Assignments

Purpose: Identify responsible person and due date for major project activities.

Task	Responsible Person	Date
1. Conduct needs assessment.	Planning Committee and Volunteer Committee	
2. Develop goals and objectives.	Planning Committee	
3. Develop management plan.	Volunteer Coordinator	
4. Identify volunteer jobs.	Planning Committee	
5. Prepare volunteer job descriptions.	Volunteer Coordinator	
6. Develop supervision plan.	Volunteer Coordinator	
7. Develop recordkeeping system.	Coordinator/Committee	
8. Develop recruitment plan.	Coordinator/Committee	
9. Develop screening/placement plan.	Volunteer Coordinator	
10. Develop orientation and training.	Planning Committee	
11. Develop recognition plan.	Planning Committee	
12. Evaluate volunteer program.	Planning Committee, Volunteer Coordinator and volunteers	

WORKSHEET #6
Volunteer Jobs

As a result of the needs assessment or a "brainstorming" session among staff, list possible volunteer jobs.

Brainstorming (Agency Needs)	Volunteer Jobs

WORKSHEET #6 (Example)
Volunteer Jobs

As a result of the needs assessment or a "brainstorming" session among staff, list possible volunteer jobs.

Brainstorming (Agency Needs)	Volunteer Jobs
Typing Correspondence Answering Telephone Filing Organizing Files Order Office Supplies	Receptionist/Typist
Resident Exercise Program	Exercise Coordinator
House Painting Yard Work (lawn mowing, shrubbery trimming) Minor Carpentry Repairs	Facilities Maintenance Director
Client Transportation to Community Services, Events	Driver

CHAPTER THREE

IMPLEMENTATION

CHAPTER THREE

IMPLEMENTATION

Up to this point, we have examined the reasons for and objectives of a volunteer program, as well as the initial planning stages. Implementing the program is the next step. The results of the needs assessment discussed in Chapter Two should prepare your agency to define the jobs best performed by volunteers. Now you need to know how to translate these needs into specific jobs for specific volunteers. This will require your agency to undergo four distinct yet interrelated implementation phases:

1. Preparing separate job descriptions.

2. Developing a recordkeeping system to monitor the new volunteers.

3. Creating a recruitment process.

4. Refining screening and selection practices to ensure you get the "right person" for the right job.

Each of these implementation tasks will be discussed in the next four sections.

SECTION 6   JOB DESCRIPTION

One key to a successful volunteer program is a carefully conceived job description. The needs assessment process provides a preliminary identification and description of ways volunteers might fulfill client, staff, administrative, and community needs. The next step is to translate these needs into individual job descriptions. In this section, we will discuss how to develop a job description and, more specifically, a format for individual job descriptions.

Developing A Job Description

Developing a job description consists of three distinct steps:

1.   Defining the job.
2.   Determining the job's importance to your agency.
3.   Preparing individualized job descriptions.

Defining the Job

One result of the needs assessment process, whether it be an informal brainstorming session or a formal survey, will be a list of activities and services that should be performed by your agency. It is then important to ask, "Can these services be done by our current staff?" If the answer is "No," then the service should be considered for a possible volunteer job. Or the volunteer can assist with current staff activities so the staff can expand to new activities. However, as Kathleen Brown maintains, saving money on salaries is not a good enough reason; if volunteers sense the organization is only interested in the budget, they may feel they are being exploited.

After identifying specific services for the volunteers, the next step requires defining these services as specific jobs and specifying the number of hours required to perform them each week. At this stage, think of the total required hours of services, rather than the number of volunteers required to perform the job. An example of such an exercise is presented in · Exhibit 6-1.

The job list serves several functions: it defines the "universe" of job tasks that need to be done; and it provides a basis for specifically discussing how a volunteer will function within your organization (Worksheet #7). Brown's suggestions for specific questions include:

> *Who will be the appropriate staff supervisor to each volunteer job? Does the appropriate person really want to supervise volunteers, or will you lose good volunteers because the wrong person is supervising them? How much staff involvement is necessary to integrate the volunteer jobs into the work plan for the organization...*[16]

It is important to involve staff in this discussion and to recognize the requirements of having volunteers in your work force.

EXHIBIT 6-1
Example of a Job Listing

Service Area	Hours/Week	Priority Rank
Administrative Support 1. Receptionist 2. Clerical Assistant	30 10	
Client Support 3. Transporter 4. Counseling Aide	10 10	
Program Support 5. Cook 6. Custodian 7. Fundraiser 8. Media/Public Speaker	 8 8 	

Determining the Importance of the Job

After completing your list of potential volunteer jobs, order these jobs in priority of need or importance. This step is necessary for several reasons:

1. It would be very difficult to mount a successful recruitment effort to fill all these jobs at once. Begin with the top priority positions, and add others as these are filled.

2. Even if all the positions could be filled within a short time period, staff would be burdened with additional supervision and training functions.

3. The potential for making mistakes (i.e., volunteer selection, assignments, etc.) are greatly compounded with the concurrent introduction of a large number of new unpaid staff members.

In other words, you need to ask yourself, "Would you double the size of your paid staff and expect things to continue normally?" Such action is not very likely. So examine your list and select up to three positions for your initial recruitment efforts.

Kathleen Brown lists some key elements that should be considered when prioritizing jobs to be performed by volunteers:

1. The job fits your organization's overall goals and policies.

2. The job has specific duties.

3. The job is supervised by a specific staff member who wants to work with a volunteer.

4. The job provides volunteers with a sense of satisfaction and a feeling of belonging to the organization.

5. The job provides learning opportunities for volunteers.[17]

Preparing Job Descriptions

The foundation of any successful volunteer program is the carefully written job description which provides the basis for:

- recruitment
- screening
- supervising
- training
- evaluating the volunteer

The job description, which should not be more than one page, should include the following seven components:

Title. Every job should have a title which supports the notion that the volunteer is a non-paid staff member, gives credence to the job's necessity, and provides a form of recognition.

Supervisor. You must carefully consider who will have responsibility for supervising the volunteer. A common complaint of volunteers is feeling that *all* paid staff have rights to their time. The supervisor's presence not only facilitates the volunteer's supervision, it also enables the program director to effectively evaluate the volunteer's performance.

Time Commitment. Time should be considered from two perspectives--the total number of hours per week or per month and the length of commitment you will require from the volunteer. When determining the latter, remember that volunteers do not, on the average, spend more than six months in one job. However, the more difficult and/or responsible the job, the longer the commitment time up to one year. A job in which constant turnover disrupts the organization should involve longer commitment times from the volunteers. For example, the "volunteer" volunteer program coordinator should require a minimum one year commitment. While recruiting and hiring for these types of positions is more difficult, the time spent finding the person capable of making a longer commitment will be worth the effort.

Duties. The duties of the job need to be specified. Marlene Wilson, volunteerism expert, notes that the less responsible the job, the more specific the job descriptions should be about time and duties. In turn, more responsible jobs should be designed with more flexibility and with broad areas of responsibility delegated in the description. Thus,

> *It is not necessary to spell out the specific tasks required to fulfill their responsibilities... The good volunteer should have the authority and freedom to decide how to do the job.*[18]

Qualifications. Required minimum job qualifications need to be specified, such as educational background and job-related experience. Alcohol service providers can include preferences for awareness and personal knowledge about alcohol/drug abuse. Many programs require the volunteer to be a recovering alcoholic with a minimum period of sobriety (e.g., from six months to three years).

Training. A statement describing the training provided by your agency needs to be included. Training content can range from broad educational information on drugs/alcohol to very specific on-the-job training skills.

Statement of Importance. If the job is not important enough to make a statement regarding how it contributes to the organization's goals, then it is not likely to be important to the volunteer.

While numerous examples for preparing volunteer job descriptions exist, Kathleen Brown's model presented in Exhibit 6-2 can work well for alcohol service providers.

A completed job description can be shared with potential volunteers (Worksheet #8). It gives them both a sense that your organization has carefully determined its personnel needs and it provides a means for volunteers to pre-screen themselves about whether they have the necessary time, skills, or interest in volunteering their time. The well-developed job description will later become the foundation for a well-focused recruitment effort.

EXHIBIT 6-2
Sample Job Description

Title:	Receptionist
Supervisor:	Director/Counselor
Time Commitment:	Overall commitment (128+ hours) ● Weekly individual commitment - 8 hours ● Length of stay (4-6 months)
Duties:	Answering telephone, logging messages Scheduling appointments Greeting and introducing visitors to program Referral to other agencies Intake for clients
Qualifications:	Personable Good communication skills, written and oral Empathy Bilingual (English and Spanish) preferred
Training:	Knowledge of community resources Development of telephone skills Logging and referral procedures General knowledge of alcoholism process/problems
Importance:	As the initial contact many people will have with the program, this is a very important position.

SECTION 7   RECORDKEEPING

Recordkeeping is often the forgotten stepchild of volunteer program management. No one enjoys keeping records; it is often boring, always time consuming, and sometimes formalizes our attempts to "informalize" management. Unfortunately, intelligent, well-kept records are essential to operating a volunteer program. This section examines some reasons for establishing good recordkeeping systems and suggests possible approaches for your agency.

Why Keep Records?

Keeping good records is an important component of any volunteer program because they:

- Document the scope of your agency's operations, and estimate what such services would cost if provided by paid staff.

- Provide a readily available summary of the number of volunteers working in your agency, and the hours they contribute.

- Furnish documented proof that the volunteer program is serving a need.

- Supply a convenient vehicle for program administrators to make sound management decisions.

- Give a clear statement of your agency's service and commitment to the community as well as the community's support of the program.

- Provide both a good referral for ongoing funding and a justification for increased funds for program expansion.

- Furnish volunteers with documented proof of their work achievements when applying for paid jobs or other volunteer positions.

- Contribute a way to evaluate volunteer services, as well as assess recognition possibilities.

- Provide information about both the most successful recruitment efforts as well as volunteer placements.

In short, efficient up-to-date records provide an excellent evaluation tool, an accounting of service and community support, future job references for volunteers, and recruitment and placement assistance. Further, they supply general information about the program's success, number and utilization of volunteers, and future funding needs.

Recordkeeping Systems

Such records are successful program implementation tools. However, recordkeeping is most useful only when simple, clear, well-organized, and current forms are used. Well-organized files and forms will provide all the above mentioned benefits, especially when guided by several principles:

1. *Keep it simple.* Identify the kind of information needed for your program, then develop a simple format to collect such information.

2. *Keep it manageable.* Design as few forms as possible to provide the maximum information. The fewer forms necessary for you and the applicant to complete, the more likely they are to be completed. Further, the easier they are to file, the easier they are to retrieve and analyze.

3. *Keep it relevant.* If you do not need or plan to use the information, then do not collect it. Also, remember record systems are most likely tailored to the needs of the individual agency.

4. *Keep it systematic.* Good recordkeeping requires a systematic approach whereby all forms and procedures logically relate to one another.

A model recordkeeping system includes the following six categories under which all pertinent information may be filed:

- Basic Informational Forms
- Volunteer Fact Cards
- Volunteer Folders
- Volunteer Time Sheets
- Master Log
- Miscellaneous Logs

Basic Informational Forms

The basic informational data base includes all information completed or provided by the volunteer when applying to or placed in your agency. An application form provides core information about the volunteer. Therefore, avoid reliance on long personnel forms which are not generally well-received and are too detailed for program needs. Successful applicants should have their informational forms entered in an individual formal file or computer record arranged alphabetically by last name. While those of unsuccessful applicants should be stored and arranged in a separate chronological file.

Volunteer Fact Card

After compiling the basic information, a fact card should be prepared for each volunteer. Because fact cards are the most frequently used volunteer reference, they should be filed alphabetically and grouped together for easy access. Index cards work well for this purpose. Fact cards should be filed separately under three groups: former volunteers, current volunteers, and prospective volunteers. Basic information should be clear and consistent, including the following:

- Name
- Assignment and Supervisor
- Address and Telephone Number
- Emergency Contact
- Schedule
- Status (active or terminated)

Different programs will alter this system to suit their individual needs. For example, court volunteer programs attach a fact card on the probationer to the card of the volunteer to provide both a record of the volunteer and his/her case. With the most basic information on the volunteer accessible, it is time to open a Volunteer Folder.

Volunteer Folder

The volunteer folder holds all correspondence, evaluations, reports, recommendations, references and application forms, exit evaluation, and any other materials relating to the individual volunteer. It also stores the monthly work record which provides a summary of work performed by the volunteer. The form is useful to explain any periods of "inactive" status, such as vacations or illness, and reasons for leaving the program. The work record should be broken into the categories displayed in Exhibit 7-1.

EXHIBIT 7-1
Individual Work Record

Volunteer's Name:			
Month/Year	Assignments	Total Hours	Notes/Comments

This model,[19] developed by Susan Ellis and Katherine Noyes, is designed for easy accessibility. As such, the work record should be stapled to the inside of the file folder jacket.

The volunteer folder should be filed like the fact cards, alphabetically and with files of past and present volunteers grouped separately. These provide a permanent record of volunteer activity.

Volunteer Time Sheet

The volunteer time sheet is the volunteer's daily documentation of hours worked. Volunteers will be motivated to keep an accurate record if they understand it will help the agency provide good references, furnish documented proof of his/her effort, and contribute to the receipt of appropriate recognition. A possible format for the time sheet might look like Exhibit 7-2.

EXHIBIT 7-2
Volunteer Time Sheet

DAILY TIME SHEET					
DAY					
Volunteer	Time In	Time Out	Total	Activity Description	Questions/ Problems

It is not uncommon for volunteers to allow "off the clock" work to go unnoted, such as time devoted to structuring schedules or organizing various efforts and projects. However, volunteers should be encouraged to document and describe all activities in which they participate. If a staff member notes any problems or has any question about the volunteer's time sheet, these should be handled immediately. Assignments and total hours should be transferred monthly to the work records, and the old time sheets placed in the volunteer folders.

Master Log

The master log provides an at-a-glance summary of all current volunteer activity. Our model[20] is adapted from Ellis and Noyes' book on volunteer recordkeeping systems. Essentially, the master log consists of a master listing of all volunteers participating in the program. It presents a chronological record of each volunteer, their primary assignment, their starting and ending date, and an indication of whether they fulfilled their commitment.

EXHIBIT 7-3
Master Log

Name	Volunteer Assignment	Age	Sex	Race	Starting Date	Ending Date	Commitment	Comment Column

A brief description of each element on the master log follows:

Name. This is not an alphabetical log, so it does not matter which name appears first.

Volunteer Assignment. Ellis and Noyes suggest each page of the master log be devoted to a specific volunteer assignment. Given the relatively small size of the volunteer component in California programs, we recommend the form not differentiate between various volunteer assignments. The job title should be used to decide the volunteer assignment. If a volunteer assumes multiple assignments, create a separate entry for this person. Note with an asterisk that this person is listed twice.

Age, Sex, and Race. Ellis and Noyes note the administrative dilemma of this element: you are legally prohibited from using information about the applicant's age, sex, or race in a screening device, but you are responsible for reporting the "racial composition" of your volunteer force. Age and sex information can help you with future targeted recruitment efforts.

Starting and Ending Date. Enter date (month, day, and year) the volunteer began and ended their service with your program.

Commitment. A unique feature of the Ellis and Noyes' log is tracking the volunteer's commitment. By comparing starting and ending dates, it is easy to note whether the volunteer fulfilled their commitment as defined in the job description. They suggest a series of symbols denoting the commitment status of the volunteer. If volunteers match their commitments, an "x" is placed in the "commitment" column. If they surpass their commitment, a "+" is entered. If they fall short, a "-" is entered.

As they suggest, the only meaningful indication of retention is whether a person remains for at least as long as they initially planned. Thus, if a person only committed for a two-month period, his/her absence after that time would not be an indication of poor retention. Used this way, the master log will accurately reflect the volunteer's satisfaction with participation in the program.

Optional Comments. Use this space for any additional comments useful for your program administrator. This might include such milestone events as completed training programs, hours serviced, recognition, etc.

At the end of a volunteer's work on a particular assignment, a clear transparent marker can be drawn through his/her time to provide easy reference.

If kept current, the master log is the source of an impressive amount of information, much of which can be gathered by simply adding the columns. It will enable you to answer such questions as:

- How many volunteers have been with the program in any given year?
- How many volunteers began work in a certain month?
- How many volunteers left in a certain month?
- How many case aides do we have?
- What is the average commitment level for receptionists?
- What percent of our volunteers are young adults?
- What percent of our volunteers match their commitment level?

Miscellaneous Logs

The above recordkeeping system is workable because it is simple; a form is used, each with its own purpose. However, to provide a complete recordkeeping system, three miscellaneous forms are useful: a form for group volunteer efforts; a log of requests for service; and a log kept by the volunteer coordinator.

Programs often receive offers from organizations to provide assistance on special projects. A church may commit a group of parishioners to prepare a fundraising mail out; a Boy Scout troop may offer light construction services for a specific area; or a civic club may provide volunteers to staff a walk-a-thon fundraiser. A request for service logs, as shown in Exhibit 7-4, should record all contributions and services provided by an agency; remember, even requests that are denied initially should be entered because no work offer by an agency

should go unrecorded. You may be able to reactivate the offer at a later time when more volunteers are needed. The volunteer coordinator log should record all work performed; the sample format in Exhibit 7-5 indicates the importance of categorizing the volunteer coordinator's tasks onto the log.

EXHIBIT 7-4
Service Request Log

Date Received	Received From	Type of Request	Handled by and Comments	Date Completed

EXHIBIT 7-5
Volunteer Coordinator Log

Date	Phone Calls	Letters	Prospective Volunteer Interviews	Meetings	Expenses	Etc.

At first glance, it may appear that this new recordkeeping system has created a bewildering array of new files. However, the above records fall neatly into the six categories explained above: Basic Information Forms, Volunteer Fact Cards; Volunteer Folders; Volunteer Time Sheets; Master Log; and Miscellaneous Forms. By keeping each category of records in a separate filing place, confusion will be avoided and the system will be simple to activate and maintain.

Creating the system based upon these six categories is less difficult than the next task — *maintaining* the newly created system. At the same time the system is being established, it is important to consider who will maintain the new files and update the forms. A volunteer is an obvious choice; but if that is not possible, build in enough time for paid staff to learn and assemble the system.

Good maintenance also requires keeping all records in a centralized location. If allowed to travel, the records may not be available when needed; an absent file represents a wasted compilation effort. Files are equally useless if they are not periodically reviewed and updated. Your records should be "clean and lean"; this requires regular purging of unnecessary and outdated information.

Good records can be a fount of information. They can even be fun to compile, especially when one anticipates the positive benefits accrued from the effort. If an efficient and workable system is created, good recordkeeping can make a measurable difference in a volunteer program.

SECTION 8   CREATE RECRUITMENT PROCESS

Maintaining current volunteer levels, expanding, or initiating a volunteer program component requires staff persons to understand and utilize successful recruitment techniques. While recruitment is an important component of any volunteer program, it is *not* the single most important aspect. As described above, if you have not identified your needs, developed job descriptions, or prepared your recordkeeping systems, you will not be in a position to recruit appropriate volunteers or make the most effective use of their services.

This section offers some guidelines and practical tips for volunteer recruitment. As a program director or volunteer coordinator, you must adapt these suggestions to your needs. Remember, recruitment can be exhausting and difficult work, so you want to devise a plan that maximizes the time, energy, and resources devoted to the process.

Guidelines for Effective Recruitment

The following five guidelines reflect the shared experience of many agencies as well as relevant knowledge from the related fields of marketing and behavioral science.

Guideline 1: Recruitment strategies should be consistent with the realities of human motivation. In volunteering, individuals are fulfilling one or more personal needs. Volunteers may be enhancing a sense of self-worth, finding new avenues for socialization, or building new skills for career growth. Thus, volunteering is *not* a one-way act of charity. Rather, your agency can help volunteers meet personal needs while meeting your agency's needs. This is a "win-win" situation!

Guideline 2: Recruitment should be based on a defined set of tasks or jobs. If you are uncertain about what volunteers should do, your recruitment efforts will not be fruitful. As emphasized previously, you must start by creating a detailed job description that identifies the required skills and abilities, specifies the person responsible for supervision, and sets forth the required time commitment.

Guideline 3: Recruitment can and should target more than the "traditional" volunteer. Traditional volunteers such as the housewife who may be seeking experiences outside the home or building skills and the professional seeking community involvement or "contacts" to enhance his/her career, can contribute greatly to an organization. However, many other types of individuals may have a place in your organization: students, business people, retired persons, handicapped, families, or tradespeople are other nontraditional volunteers. Essentially, almost everybody is a potential volunteer.

Guideline 4: Recruitment strategies should be tailored to targeted groups. Do not make general pleas for volunteer assistance. Instead, design your recruitment message and select the avenue most appropriate for your target group. This is what the business world calls "segmented marketing."

Guideline 5: The recruitment process should be managed by assigning responsibilities, keeping records, and evaluating your results. Start by setting goals and objectives, and stay organized throughout the recruitment process. You will be surprised how successful a well-designed and implemented strategy can be!

These guidelines will help you maximize your efforts to recruit volunteers.

Practical Volunteer Recruitment Tips

Once you have written your job descriptions and selected target groups, you must launch an organized recruitment effort that will appeal to personal motivations of potential volunteers. Some basic "how-to's" for this process include:

- Creating a strategic blueprint
- Using a variety of recruitment techniques
- Using community service groups
- Using your present volunteers
- Using effective communication techniques

Creating a Strategic Blueprint

Begin by asking yourself three questions:

1. Where are my target groups located and what media will reach them?

2. What kind of message will appeal to needs that volunteers would like fulfilled?

3. Who could most effectively deliver the message?

Answers to these questions will help direct your initial recruitment endeavors (Worksheet #11). For example, a possible recruitment strategy for targeting college students may include the following:

Group Location. Students are located in schools, at movie theaters, parks, shopping centers, and other popular gathering places. They also listen to the radio and watch television.

Message. Students respond to direct appeals to career goals, experience in the working place, and a chance to meet prospective employers.

Who Delivers. Students listen to their peers and tend to dismiss "mass media" messages unless they are specifically directed to their interests.

Recruitment Approach.   Presentations at school, fliers and brochures distributed at schools and gathering places, and radio spots on selected stations are effective approaches. The message can indicate job opportunities which are likely to be enhanced by volunteer experience.

Using a Variety of Recruitment Techniques

Do not depend on one single strategy for recruitment; use several approaches. Remember, certain types of recruitment strategies target different audiences:

- One-on-one appeals, such as word-of-mouth by current volunteers
- Group appeals, such as direct addresses to clubs or group meetings
- General public appeals through radio, television, mailings, etc.

There are a variety of recruitment resources and methods, including:

- Bulletins, flyers, posters, and brochures

- Newsletters

- Film, slide show, or video tape

- Recruitment booths

- One-on-one

- Newspaper, TV or radio (public service announcements, advertisements, a feature story about your work/volunteers, news coverage of an event, TV or radio talk shows)

- Speaking engagements (community groups, schools, service clubs, local Boards and Commissions, business or professional groups)

- Local resources (i.e., Volunteer Centers, United Way, Junior League, Chamber of Commerce, Retired Seniors Volunteer Program, Retired Teachers Association, Scouts or Camp Fire)

- Tours or open house

Several types of recruitment strategies can be geared to specific needs and specific opportunities:

- Ongoing, occasional, or spontaneous efforts that take advantage of a particularly good opportunity.

- Regular, high-dividend efforts, such as attending and addressing conferences, membership drives, and annual fund-raising events.

- Campaigns that target specific groups, select media avenues, and have a specially designed message. Remember, media sources include word-of-mouth, radio, television, newspapers, fliers, brochures, posters, mailings, billing inserts, and speeches. Of the recruitment strategies, campaigns that target specific groups are more focused and are more likely to result in individuals with the qualifications you are seeking. Whenever possible, conduct a selective, targeted campaign.

You will need to create a master plan for your agency's recruitment efforts. When doing so, you will discover one level of effort complements another. For example, a special campaign may reach an individual because he or she heard of an agency through an ongoing recruitment message.

Using Community Service Groups

Be sure to make use of your existing community volunteer service groups, such as local Volunteer Centers or Retired Senior Volunteer Programs (RSVP). These organizations will help provide volunteers based on your specific needs and their available resources. A well-prepared job description will facilitate their efforts to find the best candidates for your program.

Using Your Volunteers

Using current volunteers to recruit other volunteers is a common technique, and one utilized by a high percentage of California alcohol service agencies. The effectiveness of this approach was recently underscored in a Gallup survey on volunteering in which it was revealed that 43 percent of people who did volunteer did so because they were asked

personally by someone. In using this approach, make sure your volunteers use job descriptions in conjunction with their recruitment efforts and be certain they fully understand the organization's needs. Current volunteers are also excellent resources for recruitment by virtue of replacing themselves when their term of commitment nears its end. The voice of experience, friend-to-friend, is a powerful and direct approach.

Using Effective Communication Techniques

When designing your recruitment messages, be sure to follow some simple rules:

- Establish the agency's and the spokesperson's credibility;

- Avoid jargon or other language likely to be familiar only to program insiders or experts;

- Be specific and repeat what you want the message receiver to do as a result of the message;

- Anticipate and answer the message receiver's skepticism -- how will he or she benefit, what is exactly involved, etc.; and

- Summarize the message content.

Above all, BE CREATIVE and ENTHUSIASTIC! Express excitement about your program in what you say and how you say it. Providing alcohol services may be serious business; but like anything else, it can be done with enthusiasm and enjoyment. The prospective volunteer will be attracted to your organization if he or she thinks it fosters creativity and fun as well as good will. You believe in what you are doing and what you want your volunteers to do -- so communicate that message creatively and enthusiastically!

SECTION 9   DEFINE SCREENING
AND SELECTION PROCEDURES

A successful recruitment effort will, hopefully, stimulate numerous inquiries about the volunteer position openings and your organization. It is important to allocate time to prepare your staff, develop procedures, and establish ground rules for screening and placing potential volunteers. Remember, the image created during this initial period is often the most impressionable one sustained by the volunteer. Thus, it is worthwhile to spend some

time refining your selection procedures. This includes developing pre-screening activities, establishing interview schedules and format, establishing selection criteria, and preparing the necessary documentation for the entire process. In this section, we examine each of these steps in detail.

Pre-Screening Activities

Before any individual is interviewed for a position, the staff must have completed the following tasks:

1. Developed an application form;
2. Established an application review procedure;
3. Established selection criteria; and
4. Developed a response strategy to deal with applicants.

If you carefully plan the interview session, it will greatly facilitate the screening and selection process, making the approach more professional.

Application Form

The application form can be simple or complicated. The most important goal is to collect sufficient information about the individual to allow an informed interview. While the application should not be used as an alternative to an interview, occasionally information from the form can be used to decide not to pursue an applicant any further.

An information application should include the following elements:

Basic demographics

- Name, address, phone number (day and evening)

Volunteer-related information

- Availability (days and/or hours per week)
- Interest areas/hobbies
- Skills
- Prior volunteer experience

Background

- Education/training
- Prior work experience
- References

You may want to ask age, sex, race, marital status. Keep in mind you must have a specific purpose in asking for this information in order for your form to be legal as a screening device. Other types of information (i.e., transportation needs, health restrictions, reason for applying) might help screen and assign a new volunteer. Request only information that is of real value to you. At the bottom of the form, you can designate "office only" notes to indicate such items as final decision, assignment, starting date.

It can be helpful to collect sample application forms from other volunteer programs to aid in developing this important tool for volunteer program development.

Application Review Procedures

The review procedures used to select a volunteer must be determined. Specifically, you need to decide who will review applications, select applicants for interviews, be involved in the interview session, and make the decisions to hire or reject the applicant.

Selection Criteria

The selection criteria for non-paid staff should be no different from that used to select paid staff. When interviewing applicants, staff should consider if the prospective volunteer has:

- A complementary ideology
- A complementary personality
- Maturity, both emotional and functional
- Motivation and interest
- Realistic expectations

Most importantly, the prospective volunteer should possess the skills, knowledge, and abilities described in the job description.

Response Strategy

A method for responding to the applicants must be developed. Specifically, the staff should decide to use one or two interviews, whether an immediate or delayed decision about the applicant's acceptance is most appropriate, and how to deal with the inappropriate or rejected candidate. Additionally, form letters responding to the applicants should be prepared.

After initially screening the applications, staff must decide to accept, reject, and/or refer the applicant elsewhere. Kathleen Brown's advice about pre-screening is helpful: "Screening out inappropriate volunteers before you even interview them is the first step in a careful selection process."[21]

Interviewing and Selection

The interview process consists of three interrelated components: pre-interview activities, the actual interview, and post-interview procedures.

Pre-Interview Activities

Prior to any interview, it is important for the agency director to carefully select an appropriate interviewer. Once chosen, the interviewer should list the critical information he or she will need to make an informed decision and then review the application form before meeting the interviewee. Familiarity with the prospective volunteer will greatly facilitate the interview process.

Interview Session

The following suggestions should be considered when conducting the interview:

1. Make the setting comfortable by creating a friendly, non-threatening environment.

2. Use open ended questions rather than those that can be answered by a simple "yes" or "no."

3. Allow sufficient time to conduct a thorough interview; a minimum of 30 minutes should give both the interviewer and the interviewee time to ask and answer questions.

4. Allow mutual selection to occur.

5. Remember, silence is okay.

6. Trust your intuitions; if something feels wrong, it probably is.

The latter point is particularly emphasized by Kathleen Brown, "...do not dismiss your 'gut' feelings; they are often the best thing you have going for you in selecting volunteers."[22] Further, she identifies several other problems that often contribute to inappropriate selections:

> *Gratitude.* Program managers sometimes are so "grateful" someone is interested in volunteering that they tend to overlook the individual's lack of qualifications for the job or fail to notice inappropriate motivations of the potential volunteer.

> *Poor Interview Skills.* Interviewers must know how to get sufficient information from the interviewee in order to make an informed decision. Poor interview skills can result in an inappropriate selection.

> *Lack of Patience.* Program managers are "sometimes so enthusiastic about their organization or so desperate for volunteers that they oversell during the interview or they overlook potentially troubling issues they should be pursuing."[23] Take your time and screen many applicants before narrowing your preliminary and final selections.

Post-Interview

It is important to decide what will occur at the end of the interview. Will you be prepared to make a commitment to the volunteer? Will you need to schedule a second interview? Will you need to check references? Will you be prepared to place the volunteer in the job immediately? Have you developed a volunteer orientation training program? Has the supervisor been part of the selection process and if not, when should a meeting be scheduled? Have you developed a follow-up letter for those applicants who are rejected? Do you have a referral process for unsuccessful applicants?

Documentation

Four sets of documents should be developed for and used during the selection process:

- Application form
- Inquiry log
- Interview format
- Form letters

While the application form was discussed above, a short discussion about the other documents follows:

Inquiry Log

You should develop a simple form to record all inquiries received from individuals interested in volunteering. Such an inquiry log should record the following:

- Person's name, address, and phone number
- Date called or letter was received
- Interest areas/availability

The log can also supply information about sending/receiving application forms, scheduling interviews, and the result (rejected, referred, or placed).

Interview Formats

To facilitate the interview session, you might develop interview guidelines consisting of open-ended questions. Kathleen Brown suggests eight standard questions:

1. Why are you interested in this job?

2. What personal experience have you had with the agency's area of specialization? How were your experiences resolved?

3. What would you like to get from this volunteer job?

4. What do you feel you can contribute to the agency's work?

5. What are your hobbies and interests?

6. Can you make a commitment of three, four, six months or a year to the agency? Determine in advance how much flexibility the agency can afford to make scheduling work for the volunteer, staff, and clients.

7. What would you like to know about the agency, its clients, and the volunteer job itself?

8. How does the volunteer job fit in with your present life situation?[24]

Form Letters

Three form letters should be developed: one for all applicants, explaining the application process and proposing an interview date; an acceptance letter which includes a start date for the successful interviewee; and a third which suggests alternative volunteer opportunities for the unsuccessful applicant. These letters should be brief and kept on file. The "bottom line" of the selection process is to "hire" an unpaid staff member who will become an integral part of your entire staff. Thus, "hiring" procedures for volunteer positions should not differ from those used to select paid staff. This practice will help create a more positive and equal working environment for all agency personnel.

CHAPTER THREE SUMMARY SHEET

Things to Remember

1. Implementing a successful volunteer program in an alcohol services agency involves four distinct yet interrelated phases: preparing volunteer job descriptions; developing a recordkeeping system; creating a recruitment process; and adopting a screening and selection procedure.

2. Designing a job description requires three distinct steps: defining the job; determining the job's importance to your agency; and preparing individualized written job descriptions.

3. Keeping efficient, up-to-date records provides an agency with an evaluation tool, an accounting of service and community support, future job references for volunteers, and recruitment and placement assistance. Further, good records supply information about the program's success, number and utilization of volunteers, and future funding needs.

4. Establishing a model recordkeeping system involves the creation of six filing categories, each including separate forms: basic information forms, volunteer fact cards, volunteer folders, volunteer time sheets, master log, and miscellaneous logs.

Things to Do

1. Prepare a list of jobs that can be performed by volunteers and rank the jobs by priority (Worksheet #7).

2. Write job descriptions for each available volunteer position. While each description should be brief, it should also contain seven essential elements: job title, supervisory duties; required time commitment; job duties; volunteer qualifications; agency training; and a statement of the job's importance to the agency (Worksheet #8).

3. Create a recordkeeping system comprised of simple, clear, well organized, and current forms. File each of the following six types of information separately, but in a centralized location: basic information forms; volunteer fact cards; volunteer folders; volunteer time sheets; master log; and miscellaneous logs. To prepare an overview of desired forms and an overview of volunteer-related information collected, use Worksheets #9 and #10.

CHAPTER THREE SUMMARY SHEET
(Continued)

Things to Remember

5. Recruiting volunteers best suited to agency needs involves following several guidelines:

   ● Recruitment strategies should be consistent with the realities of human motivation.

   ● Recruitment should be based on a defined set of tasks or jobs.

   ● Recruitment can and should target more than the "traditional" volunteer.

   ● Recruitment strategies should be tailored to targeted groups.

   ● The entire recruitment process should be carefully managed by assigning specific responsibilities, keeping careful records, and evaluating results.

6. Adopting five basic "how-to's" can assist the recruitment process: creating a strategic blueprint; using a variety of recruitment techniques; using community service groups; using present volunteers; and using effective communication techniques.

7. Refining volunteer selection procedures involves developing pre-screening activities, establishing interview schedules and formats, establishing selection criteria, and preparing the necessary documentation for the entire process.

Things to Do

4. Adapt the suggested recordkeeping forms used in this handbook to the specific informational needs of your agency.

5. Select a paid or non-paid staff member to develop and maintain the recordkeeping system.

6. Develop an effective volunteer recruitment strategy based upon your agency's specific needs. As you begin to develop your "strategic blueprint," be sure to answer three important questions:

   ● Where are my target groups located and what media will reach them?

   ● What kind of message will appeal to needs that volunteers would like fulfilled?

   ● Who could most effectively deliver the message?

7. Complete the following pre-screening tasks before interviewing potential volunteers:

   ● Develop an application form;

   ● Establish a procedure for reviewing applications;

   ● Establish selection criteria; and

   ● Develop a response strategy to deal with applicants.

CHAPTER THREE SUMMARY SHEET
(Continued)

Things to Remember   *Things to Do*

8. Prepare for the interview session. Pre-interview activities require the agency administrator to carefully select an appropriate interviewer who, in turn, should make a list of important interview information and review the interviewee's application form. The interview itself should be conducted according to guidelines agreed upon by the agency managers and the interviewer.

9. Decide what will occur after the interview session. Will selection be made immediately or will a second interview be necessary? How will successful and unsuccessful applicants be handled?

10. Prepare three types of form letters. The first is sent to all applicants explaining the application process and setting up an interview date. The second letter is sent after the interview and includes a start date for successful applicants and the third suggests alternative volunteer opportunities for unsuccessful applicants.

11. Develop an efficient system to document your interview and selection process. Four types of documents should be included in the system: an application form; an inquiry log; a suggested interview format; and form letters as described above.

WORKSHEET #7
Volunteer Jobs and Priority Ranking

As a result of the needs assessment, prepare a list of activities and services that could be performed by volunteers. Specify the numbers of hours required and rank the jobs by priority.

Job Position	Hours/Week	Ranking

WORKSHEET #7 (Example)
Volunteer Jobs and Priority Ranking

As a result of the needs assessment, prepare a list of activities and services that could be performed by volunteers. Specify the numbers of hours required and rank the jobs by priority.

Job Position	Hours/Week	Ranking
Receptionist/Typist	40	6
Intake Worker at Detox	16	2
Floor Maintenance	10	5
Cooks/Helper	20	4
Public Speaker	4	9
Group Co-Facilitator	8	3
Transporter	20	7
Fundraiser	20	8
Volunteer Program Coordinator	40	1
Child Care Worker	On-Call	10

WORKSHEET #8
Job Description

Title:	
Supervisor:	
Time Commitment:	
Duties:	
Qualifications:	
Training:	
Importance:	

Job Description

Title:	Co-Facilitator
Supervisor:	Counselor
Time Commitment:	One day a week for two hours. One year commitment.
Duties:	Co-facilitate a group counseling session. This involves planning with the facilitator and reviewing client progress. The Co-Facilitator will be actively involved in all aspects of group session.
Qualifications:	Two years sobriety/drug free, integrity, good judgment, respect, honors confidentiality, communicates well, has capacity to relate in a warm accepting manner. Openness in handling problems of living that may not be in accordance with the volunteer's own values.
Training:	Group process skills. Regular scheduled training meetings. Specific information on denial and chemical dependency.
Importance:	You will be an integral participant in the clients' recovery program.

WORKSHEET #9 (Example)
Recordkeeping[25]

(Sample to be adapted to agency requirements)

Goal: To prepare an overview of what recordkeeping is relevant and how to obtain information

Information Needed (Check which information is needed in your organization or group)	*Will Be Obtained* (Type of form)	*By Whom*	*When*
Initial volunteer enrollment			
☐ Basic: name, address, phone	☐ Application form	_____	_____
☐ Skills and interests	☐ Placement interview report	_____	_____
☐ Time available			
☐ Person to notify in emergency			
☐ Job preference			
Volunteer work records (for individual volunteers)			
☐ Hours worked	☐ Volunteer sign-in sheet	_____	_____
☐ Training attended	☐ Training records	_____	_____
☐ Type of work	☐ Placement records	_____	_____
☐ Performance evaluation	☐ Supervisor's evaluation	_____	_____
☐ Exit interview			
☐ _____			
☐ _____			

WORKSHEET #9 (Example)
Recordkeeping
(Continued)

Information Needed	Will Be Obtained	By Whom	When
(Check which information is needed in your organization/group)	(Type of form)		

Effect of volunteer involvement

☐ Numbers served ☐ Supervisor volunteer evaluation _____ _____

☐ Changes influenced

☐ Total number of hours

☐ _____

☐ _____

Management records

☐ Volunteer program management plan ☐ Periodic written evaluation _____ _____

☐ Copies of all forms ☐ Written report of meetings _____ _____

☐ Recruitment flyers ☐ Planning handbook _____ _____

☐ Job descriptions ☐ Manager's program reports _____ _____

☐ Orientation manuals

☐ Training content and attendance

☐ Recognition activities

☐ Program evaluation

☐ Volunteer/agency agreement

☐ _____

☐ _____

WORKSHEET #10
Statistical Report — Volunteer Program[26]

(Sample - to be adapted to agency requirements)

3rd Quarter, July through September 19____

Name of Agency _____

Department Supervisor _____

I.   Client Data

A.   Number of clients being serviced by volunteers, end of last quarter   _____

B.   Number of new clients assigned to volunteers during quarter   _____

C.   Total caseload during quarter   _____

D.   Number of clients terminated from caseload during quarter   _____

E.   Number of clients being serviced by volunteers, end of this quarter   _____

F.   Number of clients being serviced directly by the Volunteer Coordinator during quarter   _____

G.   Number of clients no longer being serviced by volunteers   _____

   1.   Number of clients discharged   _____

   2.   Number of clients transferred (not committed)   _____

   3.   Number of clients no longer needing service   _____

   4.   Number of volunteers left   _____

WORKSHEET #10
Statistical Report – Volunteer Program
(Continued)

II. Volunteer Data

		Number of Volunteers	Number of People Receiving Service	Number of Hours Donated per Quarter
A.	Individual counseling	_____	_____	_____
B.	Tutoring only	_____	_____	_____
C.	Clerical/office work	_____	_____	_____
D.	Group work only	_____	_____	_____
E.	Professional services	_____	_____	_____
F.	Intake work	_____	_____	_____
G.	Other	_____	_____	_____
H.	TOTAL	_____	_____	_____

I. Number of new volunteers trained during quarter _____

J. Number of new volunteers assigned during quarter _____

K. Total number of volunteers trained from start of program to end _____
end of quarter

L. Total number of volunteers assigned from start of program to end _____
end of quarter

VOLUNTEER JOB TITLE: _____

By responding to the following questions, fill out the worksheet.

- What are my target groups?
- Where are my target groups located?
- What media will reach them?
- Who could most effectively deliver the message?

Target Groups	_Where_	_How_	_Who_
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

WORKSHEET #11 (Example)
Recruitment Planning Process

VOLUNTEER JOB TITLE: _____

By responding to the following questions, fill out the worksheet.

- What are my target groups?
- Where are my target groups located?
- What media will reach them?
- Who could most effectively deliver the message?

Target Groups	Where	How	Who
Culinary School Students and/or Graduates	California Culinary Academy, San Francisco Community colleges Correctional institutions	Posters Informational meeting	
Retirees/Senior Citizens	Retirement homes Special social organizations Churches Senior centers	Posters Informational meeting Individual meetings	
Military Personnel	Military bases	Post notice Meetings	
Parolees	Local Parole Office	Post notice	
Teachers	Schools	Presentation at staff meeting	

CHAPTER FOUR

PROGRAM MANAGEMENT

CHAPTER FOUR

PROGRAM MANAGEMENT

The previous three chapters discussed the elements of establishing a volunteer program. Now, you must consider how to successfully manage the volunteer program that you have so carefully created. Successful program management requires the development of four individual but interrelated tasks: creating a volunteer orientation and training program; developing efficient and effective supervisory procedures; designing a formal and informal way to recognize volunteer contributions; and establishing a regular evaluation component to measure your program's success. Each of these tasks is discussed in the following four sections.

SECTION 10   ORIENTATION AND TRAINING

The orientation process informs new volunteers about agency goals and objectives, the service population, and the volunteer's role in the agency. The training process teaches the new volunteer about his or her job and how to effectively function within the agency. Both orientation and training can consist of a variety of approaches, depending on the specific job requirements. Each should be developed with Kathleen Brown's advice in mind, "Volunteers have the *right* to be trained for whatever they are asked to do."[27] This section examines some features and approaches to consider when developing your orientation and training programs.

Orientation

An orientation session will introduce the volunteer to your organization's staff, clients, policies and procedures. Specifically, the orientation session should include the following major components:

- *Program description.* Present either a written or verbal history of your agency, its goals, structure, and services.

- *Policies and procedures presentation.* Explain your agency's policies and procedures and volunteer program policies and procedures (i.e., check in procedures, confidentiality procedures/policies) to the volunteer.

- *Staff introduction.* Introduce the volunteer to the staff.

- *Facilities tour.* Conduct a tour of the work area and facilities to familiarize the volunteer with the work environment. Include information on parking, coffee, bathrooms, volunteer work space.

Volunteer expert Judy Rauner has observed that "orientation provides an opportunity to build community and to bring people on board. Make time to let people get acquainted."[28] To help ensure the success of your orientation program, Rauner suggests agency administrators should:

- Understand and respect the way adults learn;

- Keep communications a two-way street;

- Make the setting comfortable;

- Get staff involved in the process so they are aware of information that is presented and can contribute their information about the program; and

- Evaluate the effectiveness of the session through the use of written or oral assessments.[29]

If these points are kept in mind when planning and implementing the orientation, the session will be a positive one for staff and the new volunteer. Remember, if this first experience with your agency is a positive one, it will greatly enhance the volunteer's expectations and feelings about the job. With groups of volunteers who will be starting together, orientation may be structured for a group with some individualized introductions in accordance with position requirements and features (Worksheet #12).

Training

Training sessions provide the volunteer with the necessary skills and information to do the job. Because each volunteer brings to the organization his or her own set of skills, aptitudes, and experiences, it is important for staff to identify the areas where volunteers need training

to complement existing abilities. Filling these gaps will become the learning goals of the training program. Consequently, training not only contributes to better job performance, but it also increases the volunteer's skills or knowledge base which, in turn, is important for volunteer recruitment and retention.

Program administrators may wish to consider creating a volunteer training manual to be distributed to volunteers when they attend their first session. Additionally, some administrators may wish to include agency procedures in a training manual.

Several types of training programs can be developed for volunteer staff: pre-service training, in-service training; and continuing education.

Pre-Service Training

Before volunteers begin their job, they must learn about the necessary skills and knowledge required to perform their work correctly. Such information should include:

- Basic job responsibilities;
- How-to instruction about the job; and
- Available resources and procedures to facilitate the process.

Whether it is part of the orientation or training effort, pre-service training should always be provided for new volunteers. To ensure the provision of well-planned, pre-service training at least one staff person should be assigned the task. He or she may be aided in their training responsibilities by a typed list of general guidelines for volunteers, suggestions for handling calls, and counseling hints.

In-Service Training

In-service training typically provides more specific information about the job or increases the personal development of the participant. It can include value clarification, role playing exercises, and courses designed to promote greater empathy for clients. In-service training should meet the current level of volunteer skills.

Continuing Education

Continuing education programs educate staff and volunteers about general interest topics. Often, such sessions are related to the agency's goals and objectives rather than job-specific information. The importance of training was emphasized by Judy Rauner:

> *Even the best qualified volunteer can be more effective with some training. Each setting is unique and each program year is different... The amount of learning needed does vary according to differences in background and past experience of each volunteer. However, when large numbers are involved in a training seminar, needs of the majority have to be addressed. Individualized needs have to be met at a different time.*[30]

Training, however, will not be an effective part of a volunteer program unless it is carefully designed to fit agency needs. Thus, when designing a training component tailored to your specific interests, it is helpful to follow four steps:

- Define the learning objectives;
- Determine a format and structure of the training group;
- Identify appropriate learning techniques; and
- Evaluate the results.

These steps are discussed in greater detail in the following sections.

> *Defining Learning Objectives:* Learning objectives explain what is to be accomplished by the training sessions. Rauner suggests three things to keep in mind when developing learning objectives.
>
> 1. The organization has the responsibility to set minimum expectations for each position.
>
> 2. The expectations of the training program must be realistic for the job.
>
> 3. There is not a job so simple or unimportant that some form of training would not be constructive.[31]
>
> It is also important to balance the existing skill level of the volunteer staff with the amount of knowledge needed to perform the job. Too little training may jeopardize the job's success, while training that repeats information and skills already acquired

by the volunteer may negatively influence his or her attitudes about the new job. Finally, remember that all learning objectives must be measurable so the success of the training program can be ascertained.

Determining Format. Each agency should consider the composition of the training group: should training involve a large group, small group, or be individualized sessions? Further, how should the training be structured -- should it be compressed into one hour, or expanded to a multi-day format? When determining the format, the following questions should be answered:

- How many people are to be trained?
- How difficult is the topic?
- What are the time limitations of the volunteers?
- Which learning activities should be used?
- How many of the instructional staff are available?

Identifying Learning Techniques. The actual techniques chosen to present the information depend on the participants' needs, the session's focus, and the trainer's abilities and resources. Possible techniques include lectures, slide show, movies, readings, small group discussions, problem-solving exercises, role playing, and questionnaires. Whatever technique is selected, it must complement both the learning objectives and the format, and composition of the group.

Evaluating the Results. A key feature of any successful program is an evaluation component that records participant reactions. An evaluation instrument should emphasize the following:

- Course content -- How relevant was the content to the session's stated objectives?

- Trainer skills -- How organized was the trainer? Were appropriate training techniques used? Was there sufficient interaction and class discussion?

- Impact on job performance -- Will the training session enable the participant to better perform his or her job?

- Training setting -- Was the setting conducive to training and learning?

Regularly conducted evaluations will indicate areas needing change and will help ensure a successful, purposeful training program that meets both the needs of the agency and the participant.

SECTION 11   SUPERVISION

The effectiveness of a volunteer's work; and, therefore, the entire volunteer program, is directly related to the quality of supervision received. Unfortunately, as some studies have shown, it is not uncommon for volunteers to receive little or no supervision.[32] All too frequently, after volunteers are recruited and selected, they are left alone to perform their tasks. Such a situation contributes to problems of staff resistance, high volunteer attrition, and volunteer discouragement.

Every person who works in an organization, whether paid or non-paid, deserves to be well-supervised. This process will enable the volunteer to perform assigned tasks more efficiently and effectively while maintaining interest in and enthusiasm for the job.

Selecting and Training Supervisors

A well-trained, enthusiastic, and conscientious supervisor can contribute greatly to the volunteer program's success. Developing a well-organized supervision procedure involves the careful selection of a supervisor, a review of his or her attitudes about volunteers, and the creation of a training program for new supervisors.

Selecting A Supervisor

The main ingredient for good supervision is designating a specific person who supervises the volunteer on a day-to-day basis. That person could be the volunteer coordinator, a salaried staff member, or another volunteer. The supervisory relationship should be clearly stated in the job description and understood by all applicants as well as paid staff members.

If one-on-one supervision is not possible for your agency, several other methods of supervision should be considered:

- Small group meetings of all staff, including volunteers, supervised by a staff member;

- Ongoing agency in-service training that includes agency paid staff working in a supervisory capacity; and

- Training programs outside the agency attended by volunteers and paid staff members acting in a supervisory capacity.

Reviewing Attitudes of Supervisor

The supervisor should be someone who wants to work with a volunteer and who understands and accepts the need to devote time and energy to ensure a mutually positive experience. If a volunteer is supervised by an non- supportive individual, the likelihood of success is greatly reduced. Staff members who do not accept the concept of volunteer co-workers should definitely not be placed in supervisory roles. Marlene Wilson emphasizes that, "One of the primary reasons for either the slow decay or quick demise of many volunteer programs is lack of staff acceptance and support. Volunteers can only work effectively as part of a team."[33] However, negative attitudes can change. Once staff have an opportunity to see someone else working effectively with volunteers, they may be willing to supervise volunteers at a later date.

One way to encourage positive supervisory attitudes about volunteers is to create and explain a list of staff and volunteer rights and responsibilities. A sample list of volunteer's and staff's right and responsibilities is shown below:

Rights	*Responsibilities*
Volunteer:	
To be treated as a co-worker	To respect confidentiality
To receive a suitable assignment	To follow policies and procedures
To know about the organization	To fulfill commitment
To have a timely orientation and training	To use time wisely
To have a place to work	To provide feedback, suggestions
To receive sound guidance and direction	To be considerate, working as a member
To be heard	
To know if work is effective	
To be recognized	

Staff:

To know what the volunteer is expected to do	To define volunteer jobs that are meaningful
To decline having a volunteer assistant	To treat the volunteer as a co-worker
To be prepared to supervise the volunteer	To assign a person to supervise each volunteer
To know that the volunteer will ask for assistance	To provide volunteer orientation and training
To know that the volunteer will maintain confidentiality	To provide adequate, pleasant work space
To expect the volunteer to be open with staff about needs, questions	To provide clear instructions
To release a volunteer who is unacceptable	To provide clear instructions to the volunteer on effectiveness of work
	To recognize the volunteer's efforts

If the supervisor and volunteer understand *and* accept such rights and responsibilities, friction is less likely to develop.

Training Supervisors

Even the most positive attitude of a staff member cannot compensate for lack of supervisory skill. If the volunteer program is to succeed, you must provide training and consulting to those staff members who become supervisors. Such training should include the following types of instruction:

- Job clarification and objective setting.

- Specific duties, responsibilities, and authority for volunteers while performing their tasks.

- The responsibility of volunteers to attend in-service training sessions, staff meetings, special training sessions, etc.

- Meeting obligations for the volunteer and his or her supervisor.

- The responsibility of volunteers to complete necessary report forms.

- How to evaluate volunteer performance.

- How to provide consulting and teaching assistance to upgrade volunteer skills.

- How to handle volunteers who are not effectively performing their tasks.

In general, the supervisor must understand what constitutes good supervision and be given the necessary training and support to provide effective supervision. Such training should include several basic principles for supervising volunteers which parallel those for supervising paid agency staff:

- Job clarification and objective setting;
- Transfer of knowledge and skills from supervisor to the volunteer;
- Ongoing feedback about the volunteer's performance; and
- Informal recognition.

Job clarification and objective setting. Clear expectations on the part of both the volunteer and the supervisor are essential for a good work situation. To attain such a relationship, the following questions should be addressed by the volunteer and his or her supervisor:

- What do we expect from each other?
- What do we have to offer each other? How much time? How much effort?
- How are we going to handle any differences or conflicts?

Discussing expectations in advance and working out any misunderstandings as they arise can make a job situation work. This understanding can be informally agreed upon or formalized through a letter of agreement.

Transfer of supervisor's knowledge and skills to the volunteer. Volunteering is above all a learning experience for everyone. Supervisors will find themselves acting as teachers or mentors while supervising volunteers. In this capacity, the supervisor should have work prepared for the volunteer, plan a manageable sequence of tasks, and provide problem solving assistance for the volunteer.

The supervisor should not only be readily available to the volunteer but should communicate information about the agency and clients on a regular basis. Thus, after the initial on-the-job training, direct supervision of the volunteer should be minimal. Instead, regularly scheduled meetings will provide an opportunity for informational updates and assessments of the volunteer's work.

Ongoing feedback about the volunteer's performance. Because volunteers are not paid, many staff members assume feedback is unnecessary. However, both positive and negative feedback are very important to a successful volunteer program. While it is often easy to give positive input, critical comments are more difficult. Remember, every volunteer has the right to receive constructive feedback; ignoring unsatisfactory as well as outstanding work may indicate the volunteer's performance is not important enough to care about its quality. Indeed, ongoing feedback between the supervisor and volunteer that recognizes positive efforts and aims to strengthen areas of weakness should improve the overall quality of volunteer involvement.

Informal recognition. Showing appreciation is an easy, although often overlooked, ingredient of good supervision for both paid or unpaid staff. Saying "thank you" to the volunteer as he or she leaves for the day, offering praise for a job well done, mentioning good work to other staff, or telling the volunteer coordinator about a particularly good job requires minimal time and effort, yet stimulates significant positive results.

The Supervisor's Role

Understanding and applying the above principles is just part of the supervisory role. Another equally important component is comprehending how the supervisory role fits into the agency's management structure. Thus, agency managers must clearly delineate the division of responsibilities among the two managerial levels dealing with volunteers -- the volunteer program coordinator and the volunteer supervisor. Such clarity is presented in Exhibit 11-1. The volunteer program coordinator has primary responsibility for recruitment, orientation, placement, recordkeeping, and formal recognition while the volunteer supervisor plays a supportive role with these tasks. Planning, job development, and evaluation are tasks shared by both managerial levels. The volunteer supervisor has primary responsibility for training, on-the-job supervision, and informal recognition and is supported in these efforts by the volunteer program coordinator.

In addition to understanding supervisor roles, it is important to provide a balance between too much concern for the volunteer and not enough. The volunteer program coordinator should regularly communicate with each volunteer to see how they feel about their work; additionally, he or she should check with staff members who supervise the volunteers to find out whether they are satisfied with the volunteer's performance. However, too much concern and supervision could discourage some more experienced volunteers. Again, balance is the key.

Volunteers also need to understand the responsibilities of the volunteer program coordinator and the supervisors. Who makes the initial contact with the volunteer? To whom does the volunteer report? Where does the volunteer take questions or concerns? These questions should be addressed by the volunteer supervisor during initial meetings with the new volunteer.

EXHIBIT 11-1
Roles and Responsibilities of Volunteer Program Management

Management Function	Volunteer Program Coordinator	Supervisor of Volunteers
Planning	Shared	Shared
Job Development	Shared	Shared
Recruitment	Primary	Supporting
Orientation	Primary	Supporting
Placement	Primary	Supporting
Training (pre- and in-service)	Supporting	Primary
Supervision on the Job	Supporting	Primary
Recordkeeping	Primary	Supporting
Evaluation	Shared	Shared
Recognition (formal)	Primary	Supporting
Recognition (informal)	Supporting	Primary

In essence, the volunteer has two supervisors. The volunteer supervisor is responsible for on-the-job supervision. However, it is the coordinator of volunteers who assumes most of the managerial tasks by:

- Providing training, support, encouragement, and consultation for volunteer staff;

- Conducting periodic verbal or written review/follow-up with both staff and volunteer;

- Pursuing any grievance procedure;

- Evaluating volunteers with assistance from the volunteer supervisor;

- Formally recognizing activities of volunteers;

- Providing ongoing training for volunteer; and

- Keeping records and statistics regarding the volunteer program.

Remember, supervision is a partnership between the volunteer, the volunteer's supervisor, and the coordinator of volunteers. Each must understand his or her rights and responsibilities in regard to the volunteer program. Such understanding of, as well as commitment to, the benefits accrued from regular volunteer supervision will contribute to both a stronger partnership and successful volunteer program.

SECTION 12   RECOGNITION

Once volunteers have been recruited and placed in your agency, how can you ensure their continued involvement? Keeping volunteers motivated and productive can only happen by concentrated efforts to recognize volunteers. Recognition should nurture a volunteer's needs by providing the opportunity for growth and expressing feelings of accomplishment, satisfying the need for socialization, and fostering the belief that volunteer efforts do make a difference.

Volunteers may be informally or formally recognized. Informal recognition consists of the very important day-to-day feedback and attitudes shown volunteers by their supervisors and co-workers. Formal recognition involves formal, public acknowledgements of volunteer achievement and service. Whether done informally or on a more formal basis, recognition is the "payment" volunteers receive from the program that "employs" them.

Because recognition is such an important component of the volunteer program, it is important to realize it is not the responsibility of any single administrator; instead, all administrators and staff members should know that recognition is a normal part of each successful work day. Indeed, they must understand that *both* informal and formal recognition must be used to help the volunteer feel properly appreciated and positively motivated.

Informal Recognition

When volunteers share a work place with full-time, paid employees, it is essential to create an atmosphere in which volunteers are accepted as team members. The temptation for regular staff to minimize the work done by volunteers can ultimately destroy the program; few people will contribute full energy when they feel unappreciated.

Informal methods to help volunteers feel an accepted and equal member of the agency include greeting the volunteer daily when he or she comes to work, asking for their professional opinion, and congratulating them when their efforts merit praise. Regularly recognizing their efforts will give volunteers feelings of achievement and satisfaction. Further, if a volunteer has performed outstanding work, then he or she should be considered for promotion, indicated by adding responsibilities or volunteer supervisory roles, as would any other worker. Allow the volunteer to be a part of staff meetings. Solicit his or her advice. Give the volunteer an opportunity to upgrade skills in workshops and conferences. Assign him or her a regular work place. Allow the most capable volunteers to work unsupervised.

Acceptance, friendship, and professional esteem help make the volunteer feel part of the team. Informal gestures of recognition that promote the team spirit include:

- Greeting the volunteer with genuine pleasure;

- Giving praise whenever something is well done;

- Remembering birthdays and other special events in the volunteer's life;

- Talking naturally and informally with the volunteer staff;

- Telling the volunteer his or her absence has been felt if they miss a shift;

- Keeping volunteers abreast on current events in the program; and

- Preventing volunteers from becoming isolated from the normal functions and operations of the program.

Certain job-specific forms of informal recognition should also be utilized:

- Providing the volunteer with interesting tasks and duties;

- Challenging the volunteer with new assignments or emergency responsibilities;

- Listening to the volunteer's ideas about his or her own job placement;

- Recognizing and using volunteer potential;

- Soliciting opinions and suggestions about the volunteer program as well as agency operation;

- Consulting with volunteers when planning and evaluating the program;

- Encouraging volunteer attendance and input at staff meetings; and

- Regularly recognizing volunteer efforts.

Remember, while informal recognition is important to a successful volunteer program, it must be augmented by some type of formal recognition.

Formal Recognition

Public ceremonies that praise volunteer efforts before one's peers are the most prevalent type of formal recognition. For some volunteers, such public pronouncements far outweigh the rewards of daily, informal recognition. Ceremonies provide a more tangible affirmation and acknowledgement by formally rewarding and recognizing volunteer efforts.

A wide variety of formal recognition activities can be held in addition to the volunteer day/award ceremony or a traditional banquet. Picnics or other special events can be organized to recognize a specific volunteer accomplishment such as the successful completion of a project; an honor roll of active volunteers displayed at the agency; or proclamations praising the work of volunteers posted on agency and community bulletin boards.

Some forms of formal recognition are designed specifically to build an *esprit de corps:*

- Swearing-in ceremonies for new volunteers;

- Identification pins or cards; and/or

- Bulletins or newsletters listing the number of people helped by volunteers and the ways in which they were assisted.

At times, special types of publicity can formally recognize the volunteer's efforts:

- Newspaper or newsletter announcements about special volunteer award meetings or ceremonies;

- "Volunteer of the Month" or "Volunteer of the Year" awards publicized in the local media; and

- News or human interest stories published about individual volunteers.

In addition, several types of letters can be written:

- Formal letter of recommendation noting specific volunteer accomplishments;

- Personal letter of appreciation from the program leader at the beginning and end of the volunteer's services; and

- Announcement of exceptional service in a newsletter or to the local media.

Not all volunteers prefer public recognition. Those who do not should be spared. In general, however, formal recognition is an easy means to give credit where credit is due.

Finally, it is important to realize that recognition activities should not be the work of one person; all those who work with the volunteers should share planning of formal and informal recognition activities. Consequently, volunteers will feel a more integral part of a team; and the subsequent recognition will be more meaningful.

SECTION 13 EVALUATION

Once the volunteer program is established, it is important to conduct periodic assessments to ensure it is meeting stated goals and objectives. Assessments conducted both at the individual and program level will provide information for informed policy, procedural, and personnel decisions. As such, evaluation is the final key to a successful volunteer program.

Why Evaluate?

The answer to the question "Why evaluate?" may be as varied as the reactions from persons who have a stake in the volunteer program's operation. While the program director may be concerned with the overall effectiveness of the volunteer recruitment effort, the staff supervisor will be more interested in the performance of newly hired volunteers.

Although the immediate purpose of evaluation is determining how well the volunteer program meets its assigned goals and objectives, it will also provide information upon which a variety of managerial decisions can be made. Accessing such information contributes to each of the five reasons organizations need to evaluate their volunteer programs:

1. To determine whether the volunteer program is accomplishing its goals and objectives.

2. To identify the effectiveness of certain volunteer program operations.

3. To determine whether the "costs" of establishing the program (e.g., staff time, effort, and monetary costs) justify the benefits or outcomes of the program.

4. To establish a data base program managers can use as a public relations tool to demonstrate the productivity and increased efficiency of their operation to funding sources.

5. To create a data base program managers can use to make informal managerial decisions.

Knowing how and why evaluation can help your agency's volunteer program is an important step. The next step involves learning *what* agencies need to evaluate.

What to Evaluate?

Program managers will want to target two separate areas for evaluation: the volunteer program itself; and the paid and non-paid staff involved in the volunteer program.

Program Evaluation

It is useful to view evaluation as the pivotal component in the program development cycle illustrated in Exhibit 13-1. As such, evaluation procedures must become an integral part of the entire volunteer program. While evaluation may be conducted informally or formally, each part of the volunteer program development cycle must be assessed periodically. Most importantly, agency administrators must carefully consider how to plan and operationalize the program evaluation.

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EXHIBIT 13-1
Program Development Cycle

Planning
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Evaluation
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Operations

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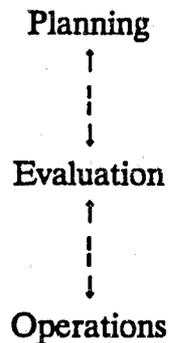
PLANNING

The first feature a new volunteer program needs for subsequent evaluation is its management plan. Chapter Two of this handbook presents certain steps programs may pursue if interested in a volunteer program. As part of this process, we recommend programs develop a *management plan* with specific *measurable activities, staff responsibilities,* and *target dates.* An effective evaluation would then review the management plan to determine whether the activity was accomplished, if the assigned person completed the task, and if it was performed by the date indicated on the management plan.

Remember, the purpose of this type of evaluation is not to find fault with the program; instead, it seeks to determine what has been done, how well it has been done, and what remains to be accomplished. In the example presented in Exhibit 13-2, it would be more important to determine *when* the goals and objectives will be developed rather than criticize Betty Planner for not completing the job. Also, this type of assessment should be able to answer *why* the job was not completed on schedule so that staff can learn to project more realistic completion dates.

EXHIBIT 13-2
Management Plan Assessment

Activity	Responsible	Date	Status Done	Status Not Done	Comments
Establish a Volunteer Planning Committee	Director	6/30	X		
Conduct a Needs Assessment	Planning Committee	6/30	X		
Identify Goals and Objectives	Betty Planner	7/15		X	Delayed to 7/30

OPERATIONALIZING

As the program moves from the planning to the operational phase, the need for structured evaluation becomes even greater. The basis for this evaluation will be the goals and objectives established for various operational features of the program. Thus, questions should be developed to demonstrate to what extent each goal and objective has been achieved. For example, a recruitment objective might include the following statement:

> *Recruit five volunteers by June 12th for the following positions: receptionist (1) and counselors (4).*

To evaluate the accomplishment of this objective, the following questions would be asked:

1. Were five volunteers hired by the stated date?
2. Were recruitment plans developed for the two positions?
3. What means were most successful in recruiting the volunteers?
4. How many volunteers were screened for the position?

By reviewing each goal and objective in this manner, program progress can be evaluated. Thus, the other parts of the volunteer program cycle -- implementation and program management -- should also be evaluated by this method.

Staff Evaluation

In addition to evaluating the overall effectiveness of your volunteer program, it is also useful to determine the effectiveness of paid and non-paid staff working within the program. Marlene Wilson indicates the similarities in conducting both types of evaluations, the job performance goals of staff members should be evaluated periodically and just as regularly as the program goals and objectives.[34] However, as Kathleen Brown warns, it is not necessary to use formal evaluations for all volunteer jobs, "You have to use your common sense about when evaluations are appropriate."[35]

When evaluating volunteers or paid staff, the following points should be considered:

1. Formal evaluations should be done with the full knowledge and cooperation of staff and volunteers.

2. Evaluations should be part of your agency's written policies.

3. Formal evaluation forms should be standardized to facilitate the procedure.

4. Evaluation should be undertaken in the spirit of honesty and sincerity.

5. Personal meetings should be arranged with each volunteer to discuss their performance, gain a more candid evaluation of the program, and show appreciation for volunteer services.

If the volunteer's performance is unsatisfactory, several options are available to the staff or volunteer:

- Provide better training;
- Change job responsibilities or duties;
- Counsel volunteer about problem areas; or
- Terminate or "counsel out" the volunteer.

Termination is only viable if the program has fulfilled its obligation to the volunteer -- that is, provided the specific training and supervision to ensure the job is accomplished appropriately.

After your agency decides what it will evaluate -- the program itself, the volunteer's involvement in the program, paid staff participation, or all three aspects of the volunteer program -- it must then determine how it will carry out the evaluation procedure.

How to Evaluate

After agency staff have identified the program goals and objectives to be measured and developed appropriate questions to decide whether they have been achieved, the implementation phase must begin. Specifically, this involves answering three important questions:

1. Who should participate in the evaluation -- paid staff members, the volunteers only, administrators, board members, or all persons involved with the program?

2. When should the participants become involved?

3. What evaluation tools should be used?

Participation

Ideally, everyone qualified to assess your program should participate in the evaluation process: volunteers, staff, administrators, clients, as well as community members. A broad-based involvement will prevent the evaluation from becoming an exercise in self approval.

Timing

The most traditional evaluation occurs after the conclusion of the program's first year. However, any period in the program can be the focal point of an evaluation. A key factor for deciding when to evaluate is ascertaining that the information collected and ar.alyzed will be useful either to redirect program efforts or develop new plans. Thus, evaluations can be problem or crisis oriented, providing information about a specific situation or event.

Tools

Evaluations can include both formal and informal methods. Formal tools include written questionnaires that assess the volunteer program and are submitted to volunteers, administrators, paid staff, and clients. Another evaluation method utilizes an agency's recordkeeping system; by tabulating available statistics about program operations, you can evaluate every major component of the volunteer program. Other evaluation techniques are

designed to assess volunteer performance as well as perceptions about the program's success. Evaluations can also be designed to measure the impact of a particular program component, such as a volunteer training session.

Informal evaluation tools can be equally useful if they are understood by staff members. Indeed, informal evaluation occurs on a daily basis if the program encourages an open atmosphere. Employees, both paid and non-paid, who feel free to discuss positive and negative aspects of the program provide excellent informal evaluative information. For those agencies seeking informal but anonymous critiques, a suggestion box centrally located in the work place is very useful.

In summary, whether the evaluation method selected by your agency is formal or informal, several rules of thumb should always apply:

1. *Evaluations must be economical.* Determine the smallest number of reports and statistics needed to understand and gain a reasonably reliable picture of your program.

2. *Evaluations must be meaningful.* Measure only the significant aspects of your program.

3. *Evaluations must be appropriate.* Utilize criteria appropriate for volunteers, rather than social workers, agency directors, or business people.

4. *Evaluations must be timely.* Recognize that some events require more rapid feedback than others.

5. *Evaluations must be simple.* Clearly and simply state the evaluation purpose and methods so those involved in the evaluation will not be confused or threatened by its use.

6. *Evaluations must be operational.* Conduct the evaluation with the intention of acting upon the findings; compiling data is not a sufficient reason in and of itself to conduct an evaluation.[36]

Once you have actually conducted the evaluation and obtained information about the volunteer program, you will then need to analyze the data and present it to staff, board members, and community members in a succinct and organized manner.

What To Do With Evaluation Results

Volunteer expert Ivan Scheier's formula for using evaluation results is both simple and effective:

- Disseminate
- Discuss
- Do something
- Don't file[37]

In other words, gathering and then forgetting information is both useless and detrimental to the program. As Judy Rauner reminds us, "If people give their feedback and their ideas, they expect something to be done with the data."[38]

Your agency, therefore, is obligated to do something with the results: post them, discuss them with all staff members at a general meeting, or use them to make positive changes in the program. By applying evaluation results to program management and change, evaluation participants will feel their efforts contributed to program betterment.

CHAPTER FOUR SUMMARY SHEET

Things to Remember

1. The volunteer's *orientation* introduces him or her to your agency's staff, clients, and policies and procedures. The *training* session provides the volunteer with the necessary skills and information to perform the job.

2. Quality supervision will help the volunteer perform assigned tasks more efficiently and effectively, while maintaining interest in and enthusiasm for the job.

3. The volunteer has two supervisors: the volunteer supervisor who is responsible for on-the-job supervision; and the coordinator of volunteers who assumes most managerial tasks related to the volunteer program. The supervisors must understand the delineation between the primary, shared, and supporting roles assumed with volunteers. Volunteers also need to understand the assignment of supervisory responsibilities.

4. Informal and formal recognition nurtures the volunteers' needs by providing an opportunity for growth and feelings of accomplishment, satisfying the need for socialization, and fostering the belief that volunteer efforts do make a difference. As such, recognition is a normal and important part of each successful work day.

Things to Do

1. Plan your volunteer orientation session which should include the following: facilities tour; program description; staff introduction; and policies and procedures presentation.

2. Prepare your organization for one or more types of volunteer training: pre-service training, in-service training, or continuing education. Preparation includes gaining the support and enthusiasm of paid staff members, as well as developing the four major components of your training program:

   ● Defining learning objectives;
   ● Determining format of the training group;
   ● Identifying appropriate learning techniques; and
   ● Evaluating the results.

3. Develop a volunteer supervision procedure which involves the careful selection of a supervisor, a review of his or her attitudes about volunteers, and a training program for new supervisors. Such training should include four basic principles: job clarification and objective setting; transfer of knowledge and skills from supervisor to volunteer; ongoing feedback about the volunteer's performance; and informal recognition.

CHAPTER FOUR SUMMARY SHEET
(Continued)

Things to Remember

5. Evaluations are particularly useful for organizations because they supply five types of information about the volunteer program:

   - A determination of whether the program is accomplishing its goals and objectives;

   - Identification of the most and least effective components in the program;

   - Comparison of program costs with the accrued benefits;

   - Establishment of a data base for program managers to use as a public relations tool; and

   - Creation of a data base around which informal managerial decisions can be made.

6. Program managers have two separate evaluation targets: the volunteer program itself; and the paid and non-paid staff involved with the program.

7. Information obtained from evaluations can stimulate needed programmatic change and can help paid and non-paid staff feel their input is worthwhile.

Things to Do

4. Inform your paid staff members about the importance of using informal and formal recognition with volunteers. Provide a series of examples that can help staff understand and use recognition methods:

   - Informal recognition methods include greeting the volunteer daily, asking for his or her professional opinion, and congratulating the volunteer for work well done.

   - Formal recognition methods include organizing formal public ceremonies or specific events to recognize specific volunteer accomplishments, displaying an honor roll of active volunteers or proclamations praising volunteer work, and writing letters for volunteers.

5. Include a regular, ongoing evaluation component in your volunteer program that evaluates both the program and its personnel. The program evaluation should not only assess the overall management plan, but should also formally scrutinize the program's goals and objectives through a structured evaluation tool. Personal evaluations should include formal and standardized evaluation forms used with the knowledge and full cooperation of your staff, as well as personal meetings between each volunteer and his or her supervisor to gain a more candid assessment of the program.

CHAPTER FOUR SUMMARY SHEET
(Continued)

Things to Remember

Things to Do

6. Design a volunteer program evaluation that includes three separate steps:

   ● Determine specific and general program goals and objectives which will be measured;

   ● Develop appropriate questions to decide whether the goals and objectives have been accomplished; and

   ● Design and implement the evaluation.

   This last step requires you to decide who should participate in the evaluation process, when they should become involved, and what evaluation tools should be used.

7. Disseminate, discuss, and act upon the evaluation results: post them, discuss them with all staff members at a general meeting, or use them to make positive changes in the program.

8. Complete Worksheets #11-14 in the workbook.

9. Read selected literature about volunteer program management.

WORKSHEET #12
Orientation[39]

| Who will be attending? | What are their needs and expectations? | What do we want to have happen? | How can we make it happen? |

OUTCOME

LEARNING GOALS

•
•
•
•

MEETING DESIGN

| Time | Activity | Who is in charge? | Needs/Arrangements |

FOLLOW UP (Who is responsible)?:

WRITTEN MATERIALS NEEDED:

ACTIVITIES:

Before meeting:

During meeting:

After meeting:

WORKSHEET #12 (Example)
Orientation
(Continued)

Time	Activity	Who is in charge?	Needs/Arrangements
7:30	Introduce staff present and staff comments.	Volunteer Coordinator and Staff	Orientation packet, job descriptions
	Information on Volunteer Program, available volunteer positions, training, policies and procedures		
7:50	Questions, discussion	Volunteers	
8:00	Closing of Orientation Session, evaluation of session, information or facilities tour	Volunteer Coordinator	

FOLLOW UP (Who is responsible)?: *Volunteer Coordinator*

WRITTEN MATERIALS NEEDED:
* *Welcoming letter*
* *Agency brochure*
* *Recent budget*
* *Organization chart*
* *Job description*
* *Volunteer/staff rights and responsibilities*
* *Volunteer policies and procedures*
* *Training schedule*

ACTIVITIES:
Before meeting:
* *Arrange desk/location*
* *Contact volunteers, Executive Director, staff regarding orientation*
* *Compile orientation packet*
* *Develop evaluation form*
* *Arrange for refreshments*
* *Prepare flip charts*

During meeting:
* *Facilitate training*
* *Evaluation*

After meeting:
* *Facilities tour*
* *Follow-up with volunteers, Executive Director, and staff*

WORKSHEET #13
Supervision Planning Sheet

1. Who are the supervisors of volunteers in the agency/organization?

2. What is the communication system between the volunteer coordinator and others who share the supervisorial responsibilities?

3. How could this system be strengthened?

4. Resources and opportunities for in-service training for volunteer supervisors include:

5. Additional needs:

WORKSHEET #14
Recognition

Goal: To plan recognition of our program volunteers.

Recognition Planning Calendar[40]

		Who is Responsible
Time of Year	*Activity*	

MONTHLY
(i.e., Newsletter, regular meeting
with volunteers

MID-YEAR
(Volunteer conference)

SPECIAL EVENTS
(Thanksgiving letter to volunteers)

END OF PROGRAM YEAR
(A celebration for volunteers and
spouses)

WORKSHEET #15
Evaluation -- Management[41]

Goal: To obtain Volunteer Program Management Evaluation by Management Team
Suggestions: Circle your response regarding the effectiveness of volunteer planning
and implementation. (1 - no, 5 - yes)

PLANNING	No				Yes
Did you have an adequate opportunity to contribute to planning?	1	2	3	4	5
Were you aware of and satisfied with the finished plan?	1	2	3	4	5

IMPLEMENTATION

Did the job description reflect what was needed on the job that you supervised?	1	2	3	4	5
Did you have the numbers and types of volunteers that you needed?	1	2	3	4	5
Were you aware of when orientations were held for volunteers and staff and what information was presented?	1	2	3	4	5
Were the volunteers placed with you the right people for the job?	1	2	3	4	5
Was adequate pre-service and in-service training received by the volunteers you supervised?	1	2	3	4	5
Did you have enough preparation and time to be an effective supervisor?	1	2	3	4	5
Were the records you were asked to keep relevant and did you receive feedback on accumulated information?	1	2	3	4	5

WORKSHEET #15
Evaluation – Management
(Continued)

	No				Yes
Was opportunity to give input on how the program was functioning available during the year?	1	2	3	4	5
Did you feel that volunteer efforts benefitted the organization and that you found ways to express appreciation to volunteers?	1	2	3	4	5

Things I particularly liked about working with volunteers this year were:

Things I would like to see changed in the volunteer program are:

WORKSHEET #16
Evaluation — Volunteers[42]

Goal: To obtain Volunteer Program Management Evaluation by Volunteer Suggestions: Circle your response regarding the effectiveness of volunteer planning and implementation. (1 - no, 5 - yes)

PLANNING   No   Yes

Did you feel you had enough opportunity to contribute to   1 2 3 4 5
planning?

Were you aware of and satisfied with the finished plan?   1 2 3 4 5

IMPLEMENTATION

Did the job description of your job represent what needed   1 2 3 4 5
to be done?

How did you hear about this volunteer opportunity?

[ ] Pamphlet   [ ] Newspaper   [ ] From another volunteer
[ ] Other Source:_____

Did your orientation provide a basic introduction to the   1 2 3 4 5
organization — its purpose and how it functions?

Did you feel your job utilized your talents and satisfied   1 2 3 4 5
your reasons for choosing to volunteer?

Did pre-service training prepare you to start your job, and   1 2 3 4 5
in-service provide opportunity for ongoing growth?

Did you feel that adequate supervision time and energy   1 2 3 4 5
was available to you?

WORKSHEET #16
Evaluation -- Volunteers

	No				Yes

Were the records you were asked to keep relevant and
did you receive feedback on accumulated information?   1 2 3 4 5

Was opportunity to give input on how the program was
functioning available during the year?   1 2 3 4 5

Did you feel people in this organization acknowledged
and appreciated your volunteer contribution?   1 2 3 4 5

Things I particularly liked about working as a volunteer this year were:

Things I would like to see changed in the volunteer program are:

CONCLUSION

CONCLUSION

A volunteer program can provide useful and often essential resources for alcohol service providers. However, as this handbook indicates, establishing a volunteer program is not an easy task; it takes a great deal of time, human resources, and commitment to carefully conceptualize, plan, implement, and manage an effective volunteer program.

Indeed, introducing volunteers to your agency requires the creation of a carefully designed *program;* individuals cannot merely be added to the staff without a systematic preparation and implementation process. While developing an actual program is both time and resource consuming, the reward of a well-organized and effective cadre of dedicated volunteers is well worth the effort.

Therefore, once your agency decides to establish a volunteer program it must take four very important steps to ensure its success and maintenance:

- *Conceptualizing* -- determining if your agency actually needs a volunteer program and anticipating both the costs and benefits of such an endeavor.

- *Planning* -- preparing to implement a volunteer program by identifying its goals and objectives and discussing the most effective ways to use volunteers in your agency.

- *Implementing* -- translating plans into actions that identify volunteer jobs as well as recruit and select enthusiastic and dedicated volunteers.

- *Managing* -- creating a managerial system that provides training, supervisorial recognition, and evaluation opportunities designed to motivate and retain enthusiastic and dedicated volunteers.

Remember, these steps are interrelated -- you cannot implement any one without the others and expect the program to succeed. They *are* time-consuming steps, but they will work!

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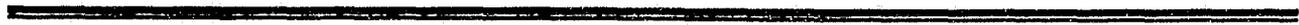
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