

MANAGEMENT RELATIONS

“You make a living by what you get, you make a life by what you give.”

-Winston Churchill

Websites

www.energizeinc.com
www.pointsoflight.org
www.library.com/CDRC

Books

From Delaware State Libraries Volunteerism Collections

- McCurley and Lynch, *Volunteer Management-Mobilizing all Resources of the Community*
- McCurley and Vineyard, *Best Practices for Volunteer Programs*

From the State Office of Volunteerism Library, New Castle, DE (non-lending)

- McCurley and Lynch, *Essential Volunteer Management*
- Points of Light Foundation, Volunteer Management training Series, “Supervising Volunteers,” Course 5

In this section:

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DELAWARE HEALTH AND SOCIAL SERVICES

Division of State Service Centers State Office of Volunteerism

Governor's Commission on Community and Volunteer Service

WHY ARE MANAGEMENT RELATIONS SO IMPORTANT TO A SUCCESSFUL VOLUNTEER PROGRAM?

Supervising volunteers may be the direct responsibility of the Volunteer Administrator or it may be the province of paid agency staff who take over after a volunteer is placed.

In either case, it is essential that the volunteers are managed by using the best practices available and that volunteer administrators insure that supervisory training is made available to staff who have the responsibility of working with volunteers. When not directly involved in supervision, the coordinator should plan periodic check-ins with both the volunteers and supervisors staff to get their feedback and ensure their satisfaction.

By taking advantage of the resources in this section as well the ones listed below, volunteer administrators will find a wealth of information related to the supervisions of volunteers.

What We Learned (the Hard Way) about Supervising Volunteers: An Action Guide to Making Your Job Easier

Jarene Frances Lee with Julia M. Catagnus

***Excerpt taken from www.energizeinc.com*

A related, but sometimes more problematic category, is the volunteer who is “aging in place.” This is someone who joined you when s/he was younger and fit, but has grown older and now has diminished capacity. The quandary, of course, is that you feel loyalty to a volunteer who has contributed many hours of devoted service and it is awkward to have to confront the changes in ability that age may bring. But for the sake of your service recipients and the volunteer personally, you must find ways to balance the best interests of everyone.

Supervision tips:

1. Know the volunteer’s sight and hearing limits and give written material or oral instructions with this in mind.
2. Pay attention to physical fatigue and talk with the volunteer about his/her strength and endurance.
3. When possible, buddy them up with younger volunteers. This technique is especially good for volunteers “aging in place,” who know the job but could benefit from some support and perhaps oversight.
4. Insist on a rotation policy for everyone so that no volunteer becomes so entrenched in one assignment that it’s impossible to make a change. Offer an “aging in place” volunteer an alternate assignment that makes use of long-time service, such as helping with new volunteer orientation—but only if s/he would be good at it!
5. Don't ignore a deteriorating situation. Sometimes starting a concerned (but caring) conversation gives the volunteer the opening to admit to feeling insecure and less able to do the work s/he formerly considered a breeze.
6. Only when appropriate, consider involving the volunteer's grown children in approaching their parent about changing abilities, or even the family physician

Employee/Volunteer *Tension*

The problem most often identified by organizations with volunteers is tension between employees and volunteers. Whether the setting is a health center, a museum, or a school, developing teamwork between the paid and unpaid workers is a true challenge. Is there something inevitable about friction when volunteers are on the scene? In some ways, yes.

Too many organizations recruit volunteers with the expectation that “more hands” will be a good thing. The problem is that those extra hands are attached to complete human beings, needing more time and attention than was planned. And most of the time the paid staff has had no training in how to work effectively with volunteers. They are expected to do so instinctively.

Volunteer management is the “invisible personnel issue” that surfaces when tension boils over. Yet many of the issues causing conflict between volunteers and employees can be avoided with forethought.

The Employee Perspective

Employees who dislike working with volunteers are not bad people. In the absence of clear signals from above, employees are suspicious of the motives for encouraging volunteer involvement: Is this a first step in budget cutting? What if the volunteers do great work? Will staff jobs be on the line? Who will be accountable if a volunteer does something wrong? These are all valid questions that can be answered to alleviate fears.

Other issues that may be fact or fear are:

- There is limited workspace already and now it has to be shared with volunteers.

- Volunteers are an interruption in an already over-busy day.

- Volunteers see what goes on and may criticize or offer unrealistic suggestions.

- It is hard to design work for a teenager one day, a senior the next day, and a graduate student the next.

Volunteers seem to get all the thank-yous. The list can go on and on, but the pattern is clear.

An agency should elicit open discussion of why volunteers have been recruited and what it will take to put them to work productively. It should also listen to legitimate concerns (such as limited space or necessary requirements for certain jobs) and work with employees to solve them. Most important, employees need some training in how to work with volunteers. Many truly do not

know if or how they can set standards, require accountability, or criticize volunteers. They also need to understand the importance of friendliness, courtesy, and appreciation.

The Volunteer Perspective

It takes two to tango. Sometimes it is the attitude of the volunteers that leads to trouble. Some potential issues are:

- Volunteers may feel more experienced than the paid staff.

- Volunteers see paid staff taking breaks or socializing and may misperceive their dedication.

- Volunteers may arrive on time and find no work prepared.

- Volunteers may believe their job is to “protect” clients from the system and to watchdog against possible abuses.

- They may feel that they are given the low-level work employees don’t like to do.

- They may feel unappreciated.

- Because there is a time lapse between their shifts, volunteers sense they are out of the communication loop and don’t know what is going on.

These types of issues send the message to volunteers that they are outsiders, tolerated rather than welcomed. In some cases such feelings are incorrect conclusions, but in other cases volunteers have not been integrated into the team.

The orientation and training of volunteers should include a description of the roles of the employees with whom they will be working. Volunteers should also understand the chain of command and know where and how to register a complaint, express praise, or make suggestions supportively.

The Management Perspective

If volunteer involvement is a desired goal, management must do its part to assure that teamwork can occur naturally. This means setting goals and objectives for volunteers and staff, articulating policies that set standards for volunteers, rewarding staff who supervise volunteers well, correcting those who do not, and other well-established steps that demonstrate agency expectations. Volunteers cannot integrate themselves into the organization alone—but when given the opportunity and the support, everyone can join together to make it work.

TERMINATE OR TOLERATE?

Dealing With a Problem Volunteer

One of the most disturbing aspects of managing volunteer programs is the unfortunate incidence of volunteers who become problems. Often the circumstances surrounding these situations are founded in the volunteer. On the other hand, many of the situations are preventable with good volunteer management practices. The good news is that firing a volunteer is possible. While firing is not appropriate for dealing with the often annoying volunteer or even the seriously disruptive volunteer, it is appropriate for dysfunctional volunteers.

This paper will discuss when termination is needed, what supervisory details need to be addressed and issues to consider related to impact of termination. The advisory leader role will be used in examples because they are perhaps the most distinguished and influential volunteers in the Extension system. The principles and practices however, apply to any volunteer role or volunteer at any level in the organization.

In Extension we are prone to be grateful to any volunteer who walks into the office wanting to help. We are so problem oriented, we tend to think we can fix any problem. Not always true. McCurley and Vineyard, 1998, offer the following myths:

Myths about Problem Volunteers

1. If I ignore the problem it will go away.

The problem volunteer may recede from the limelight, but will still be lurking and possibly be harder to identify at a later time.

2. No one else notices

Particularly, the complaining volunteer will be noticed. No need to be a martyr when it does not help the situation.

3. I can fix a dysfunctional person.

This is not in the volunteer manager's job description and other volunteers will eventually resent the time and energy drain taken from their legitimate issues.

4. There's good in everyone...we just need to give them time to show it.

Unfortunately, it must be acknowledged that there are evil, nasty people who enjoy causing others to be hurt. Allowing them to continue is harmful to the program.

5. A confrontation will make things worse. They might get mad.

The best interest of the program is the first consideration. The volunteer manager has to maintain control.

6. A confrontation might result in the volunteer leaving and if they do, the program will fall apart.

If this is true, deeper problems than the one problem volunteer exist.

7. If I'm a truly caring person, I can handle all the people who are problems.

Volunteer managers do not have to be “saints”. All the feel-good people cannot solve problems caused by mean-spirited people.

8. Everyone wants to be fixed.

Not true. Some people enjoy the attention they get or watching the chaos they create. The myths address “problem volunteers” who need to be dealt with but not necessarily “fired”. There are books written about various strategies to handle the confrontational volunteer, the whining volunteer, the “bully” volunteer and others. This paper will not address this large group of problems. What it will address are the valid reasons to “fire” a volunteer. There are three reasons that are supported in the literature:

Competency Issues

Unfortunately, there are instances when orientation and competency-based training over time still fail to help a volunteer perform the role acceptably. Another possibility McCurley, 1996, refers to is motivation. Is the volunteer able, but just not motivated? Or is he motivated, but unskilled. In some cases, volunteers outgrow the job they are in, and do not want someone else doing the job. An example is an advisory leader who did not come to meetings for two years, but when a new member joined the council, he staked out his geographic territory in no uncertain terms. In such cases, volunteers fill a space that needs to be occupied by an active volunteer.

With competency issues, the volunteer manager must do orientation training and other needed training. It is not enough to just offer training either. Documentation of the volunteer's attendance at orientation and competency training is critical evidence the volunteer manager may need to produce. Volunteers may have either rejected training opportunities or something in their personal situation may have impacted performance on the job.

Fulfillment of Role Issues

When the volunteer goes beyond the role they have been given, there may be justification for firing. Examples include volunteers who do things they are not authorized to do. In these cases, while they may mean no harm, if they are not properly trained, they can absolutely do harm. Examples include the advisory leader who meddles in faculty personnel issues, or the leader who represents Extension inappropriately with community groups.

With these issues, the job description and more specifically, the position description is a key management tool. The job description should be discussed in orientation training with the new volunteer. A good way to confirm their understanding of the role is to modify the job description to create a position description for each volunteer which they sign at the conclusion of the session. The job description should outline the goals, objectives, and performance measures of the job.

Behavior Issues

Even the best application and screening processes can fail to detect someone who for whatever reason, makes poor judgment decisions relative to personal actions. The volunteer who suddenly becomes abusive, disrespectful of authority, or hostile may be having personal issues to deal with that have nothing to do with the volunteer job. These volunteers can be harmful to the program and to individuals in the program. In some of these type situations the volunteer may be acting different from their normal pattern. Sometimes these type behaviors become normal over time and they may be intentional. The best management practice in these situations is documentation and dealing with incidents as they occur. For some of these situations, termination is the best alternative for the good of the program.

Supervisory Responsibilities

Terminating volunteers is possible, but should probably be employed only if the situation is very detrimental to the organization and after all other alternatives have been explored.

Consider the following options:

- Re-assigning to another volunteer role. For example, they may perform well in a different program area or on a program committee rather than the overall council level.
- Referring to another agency or organization.
- Recognize and retire them from the volunteer role.
- Insist on re-charge time when they are rotated out of their position for a specified period of time.

In county Extension programs, the County Director is ultimately responsible for making sure faculty utilize best volunteer management practices.

Appendix A is a Scenario of a Volunteer Dismissal. McCurley and Lynch, 1996, suggest that volunteer managers develop a system for making firing decisions. Elements of a good system include:

1. Forewarning / notice

- Personnel policies regarding employment of volunteers including probation, suspension, and termination.
- A volunteer application and screening process and operating procedures to guide informing new volunteers about policies.
- A job description and mechanism for explaining the job requirements and unacceptable behavior. Orientation and competency based training with documentation of attendance is important.

2. Investigation / determination

- Having a clearly defined process for conducting a fair investigation.
- Being consistent with policies of the Personnel Department of the organization.

3. Application

- Follow-through on enforcing the system.
- Treat all volunteers equitably.
- Providing a peer-review mechanism so decisions are not personal.

Impacts of Firing Decisions

Dealing with problem volunteers is time consuming, emotionally draining, and potentially detrimental to the program. McCurley and Lynch, 1996 note two benefits of having a firing system in place:

1. The right decision is more likely to be made.
2. A case for the termination is developed. This can help diffuse negative impact in the community or even externally. Often, the volunteer will decide voluntarily to resign rather than face the inevitable.

In terms of replacing advisory leaders on an advisory council, there is a Checklist of Questions attached in Appendix B. This checklist addresses additional volunteer management practices that are fundamental. Appendix C offers Strategies to Re-Staff an Advisory Council. It is not uncommon for a new County Director to inherit an Advisory Council that is predominately Extension “family, older volunteers with a traditional view of Extension programs, and a few influential members who do not come to meetings. Starting completely over is desirable, but not always possible considering the political nature of most counties.

Summary of Best Management Practices

While firing a volunteer is not easy or pleasant, it can be done. Better yet, is to use the best volunteer management practices referenced in this paper. They are:

- Develop a system for handling problem volunteers.
- Use clearly written job descriptions.
- Use orientation training to detail the job description and the processes for removal.
- Conduct competency based training.
- Have group operating procedures that specify member expectations.
- Provide volunteers with evaluation and regular feedback on performance.

References:

Lee, Frances Jarene with Julia M. Catagnus. 1999. What we learned (the hard way) about supervising volunteers: an action guide for making your job easier. Energize, Inc., Philadelphia, PA.

McCurley, Steve and Rick Lynch. 1996. Volunteer management: mobilizing all the resources of the community. Heritage Arts Publishing, Downers Grove, IL., pp. 105-110.

McCurley, Steve and Sue Vineyard. 1998. Handling problem volunteers. Heritage Arts Publishing, Downers Grove, IL pp. 41-52.

Successful Delegation

Using the Power of Other People's Help

Even Super-You needs help and support. There is no shame in asking for assistance. Push aside the pride and show respect for the talent others can bring to the table.

And, remember that there is no such thing as a single-handed success: When you include and acknowledge all those in your corner, you propel yourself, your teammates and your supporters to greater heights.

- Author Unknown.

Do you feel stressed and overloaded? Or that your career seems stalled? If so, then you may need to brush up your delegation skills!

If you work on your own, there's only a limited amount that you can do, however hard you work. You can only work so many hours in a day. There are only so many tasks you can complete in these hours. There are only so many people you can help by doing these tasks. And, because the number of people you can help is limited, your success is limited.

However, if you're good at your job, people will want much more than this from you.

This can lead to a real sense of pressure and work overload: You can't do everything that everyone wants, and this can leave you stressed, unhappy, and feeling that you're letting people down.

On the positive side, however, you're being given a tremendous opportunity if you can find a way around this limitation. If you can realize this opportunity, you can be genuinely successful!

One of the most common ways of overcoming this limitation is to learn how to delegate your work to other people. If you do this well, you can quickly build a strong and successful team of people, well able to meet the demands that others place.

This is why delegation is such an important skill, and is one that you absolutely have to learn!

Why People Don't Delegate

To figure out how to delegate properly, it's important to understand why people avoid it. Quite simply, people don't delegate because it takes a lot of up-front effort.

After all, which is easier: designing and writing content for a brochure that promotes a new service you helped spearhead, or having other members of your team do it?

You know the content inside and out. You can spew benefit statements in your sleep. It would be relatively straightforward for you to sit down and write it. It would even be fun! The question is, "Would it be a good use of your time?"

While on the surface it's easier to do it yourself than explain the strategy behind the brochure to someone else, there are two key reasons that mean that it's probably better to delegate the task to someone else:

- First, if you have the ability to spearhead a new campaign, the chances are that your skills are better used further developing the strategy, and perhaps coming up with other new ideas. By doing the work yourself, you're failing to make best use of your time.
- Second, by meaningfully involving other people in the project, you develop those people's skills and abilities. This means that next time a similar project comes along, you can delegate the task with a high degree of confidence that it will be done well, with much less involvement from you.

Delegation allows you to make the best use of your time and skills, and it helps other people in the team grow and develop to reach their full potential in the organization.

When to Delegate

Delegation is a win-win when done appropriately, however that does not mean that you can delegate just anything. To determine when delegation is most appropriate there are five key questions you need to ask yourself:

- Is there someone else who has (or can be given) the necessary information or expertise to complete the task? Essentially is this a task that someone else can do, or is it critical that you do it yourself?
- Does the task provide an opportunity to grow and develop another person's skills?
- Is this a task that will recur, in a similar form, in the future?
- Do you have enough time to delegate the job effectively? Time must be available for adequate training, for questions and answers, for opportunities to check progress, and for rework if that is necessary.
- Is this a task that I should delegate? Tasks critical for long-term success (for example, recruiting the right people for your team) genuinely do need your attention.

If you can answer "yes" to at least some of the above questions, then it could well be worth delegating this job.

Other factors that contribute to the delegability of a task include:

1. The project's timelines/deadlines.
 - How much time is there available to do the job?
 - Is there time to redo the job if it's not done properly the first time?
 - What are the consequences of not completing the job on time?
1.
 2. Your expectations or goals for the project or task(s), including:
 - How important is it that the results are of the highest possible quality?
 - Is an "adequate" result good enough?
 - Would a failure be crucial?
 - How much would failure impact other things?
- 2.

That being said, having all these conditions present is no guarantee that the delegated task will be completed successfully either. You also need to consider to whom you will delegate the task and how you will do it.

The Who and How of Delegating

Having decided to delegate a task there are some other factors to consider as well. As you think these through you can use our free [Delegation Worksheet](#) to keep record of the tasks you choose to delegate and who you want to delegate them to.

To Whom Should You Delegate?

The factors to consider here include:

1. The experience, knowledge and skills of the individual as they apply to the delegated task.
 - What knowledge, skills and attitude does the person already have?
 - Do you have time and resources to provide any training needed?
1.
 - The individual's preferred work style.
 - How independent is the person?
 - What does he or she want from his or her job?
 - What are his or her long-term goals and interest, and how do these align with the work proposed?
 -
 - The current workload of this person.
 - Does the person have time to take on more work?
 - Will you delegating this task require reshuffling of other responsibilities and workloads?
 -

When you first start to delegate to someone, you may notice that he or she takes longer than you do to complete tasks. This is because you are an expert in the field and the person you have delegated to is still learning. Be patient: if you have chosen the right person to delegate to, and you are delegating correctly, you will find that he or she quickly becomes competent and reliable.

How Should You Delegate?

Use the following principles to delegate successfully:

1. Clearly articulate the desired outcome. Begin with the end in mind and specify the desired results.
2. Clearly identify constraints and boundaries. Where are the lines of authority, responsibility and accountability? Should the person:
 - Wait to be told what to do?
 - Ask what to do?
 - Recommend what should be done, and then act?
 - Act, and then report results immediately?
 - Initiate action, and then report periodically?
3. Where possible, include people in the delegation process. Empower them to decide what tasks are to be delegated to them and when.
4. Match the amount of responsibility with the amount of authority. Understand that you can delegate some responsibility, however you can't delegate away ultimate accountability. The buck stops with you!
5. Delegate to the lowest possible organizational level. The people who are closest to the work are best suited for the task, because they have the most intimate knowledge of the detail of everyday work. This also increases workplace efficiency, and helps to develop people.
6. Provide adequate support, and be available to answer questions. Ensure the project's success through ongoing communication and monitoring as well as provision of resources and credit.
7. Focus on results. Concern yourself with what is accomplished, rather than detailing how the work should be done: Your way is not necessarily the only or even the best way! Allow the person to control his or her own methods and processes. This facilitates success and trust.
8. Avoid "upward delegation". If there is a problem, don't allow the person to shift responsibility for the

task back to you: ask for recommended solutions; and don't simply provide an answer.

9. Build motivation and commitment. Discuss how success will impact financial rewards, future opportunities, informal recognition, and other desirable consequences. Provide recognition where deserved.
10. Establish and maintain control.
 - Discuss timelines and deadlines.
 - Agree on a schedule of checkpoints at which you'll review project progress.
 - Make adjustments as necessary.
 - Take time to review all submitted work.

In thoroughly considering these key points prior to and during the delegation process you will find that you delegate more successfully.

Keeping Control

Now, once you have worked through the above steps, make sure you brief your team member appropriately. Take time to explain why they were chosen for the job, what's expected from them during the project, the goals you have for the project, all timelines and deadlines and the resources on which they can draw. And agree a schedule for checking-in with progress updates.

Lastly, make sure that the team member knows that you want to know if any problems occur, and that you are available for any questions or guidance needed as the work progresses.

We all know that as managers, we shouldn't micro-manage. However, this doesn't mean we must abdicate control altogether: In delegating effectively, we have to find the sometimes-difficult balance between giving enough space for people to use their abilities to best effect, while still monitoring and supporting closely enough to ensure that the job is done correctly and effectively.

The Importance of Full Acceptance

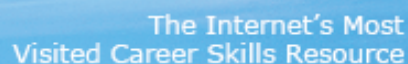
When delegated work is delivered back to you, set aside enough time to review it thoroughly. If possible, only accept good quality, fully-complete work. If you accept work you are not satisfied with, your team member does not learn to do the job properly. Worse than this, you accept a whole new tranche of work that you will probably need to complete yourself. Not only does this overload you, it means that you don't have the time to do your own job properly. Of course, when good work is returned to you, make sure to both recognize and reward the effort. As a leader, you should get in the practice of complimenting members of your team every time you are impressed by what they have done. This effort on your part will go a long way toward building team member's self-confidence and efficiency, both of which will be improved on the next delegated task; hence, you both win.

Key Points:

At first sight, delegation can feel like more hassle than it's worth, however by delegating effectively, you can hugely expand the amount of work that you can deliver. When you arrange the workload so that you are working on the tasks that have the highest priority for you, and other people are working on meaningful and challenging assignments, you have a recipe for success.

To delegate effectively, choose the right tasks to delegate, identify the right people to delegate to, and delegate in the right way. There's a lot to this, but you'll achieve so much more once you're delegating effectively!

**Taken from:http://www.mindtools.com/pages/article/newLDR_98.htm




- For information about delegation, visit www.mindtools.com/rs/Delegation.
- For tips on time management, visit <http://www.mindtools.com/rs/MTFS>.
- For business leadership skills visit <http://www.mindtools.com/rpages/HowtoLead.htm>.

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EVALUATING YOUR ORGANIZATION FROM A VOLUNTEERS POINTS OF VIEW

What do volunteers experience in your agency as they do their work? Do you know? It is useful to be aware of the way volunteers are treated because your success of recruiting and retraining the best volunteers depends on the support you give them. One interesting self-analysis exercise to do is a “mental walk through” of the kinds of issues that might arise from volunteer participation. If you are starting a new volunteer program or project, you might consider these a necessary step in answering the question, “Are we ready for volunteers?”

| | For each situation listed below, evaluate your organizations response. | What would happen?  | If you don't know, how would you find out? | How could this response be improved? |
|------------|---|---|--|--------------------------------------|
| 1. | 1. A prospective volunteer calls the main line to ask about volunteering. | | | |
| 2. | Someone comes to the reception desk on the day of their interview | | | |
| 3. | A Volunteer arrives for their first day. | | | |
| 4. | A volunteer reaches a milestone anniversary with the organization. | | | |
| 5. | A volunteer needs some work space to spread papers. | | | |
| 6. | An employee acts discourtesly to a volunteers. | | | |
| 7. | A volunteer calls in with a questions, but their supervisor is out. | | | |
| 8. | A volunteer wants to make a suggestion about how to improve . | | | |
| 9. | A volunteer does something wrong. | | | |
| 10. | A volunteer does something wonderful. | | | |
| 11. | A volunteer hurts themselves on the job. | | | |
| 12. | A volunteer finishes an assignment early. | | | |
| 13. | A volunteer is told something is too “confidential” for them to hear. | | | |

APPROPRIATE ROLES FOR VOLUNTEERS

Review the list of tasks in the left hand column and decide how appropriate this role would be for volunteers to perform and note why you rated it this way. If possible discuss your results with others.

| Tasks: | Fine for volunteers as written | Questionable-needs adjustment | Inappropriate for volunteers | Why did you rate it this way? |
|--|--------------------------------|-------------------------------|------------------------------|--------------------------------------|
| Carry 50 pound cases of food to the warehouse | | | | |
| Consul delinquent youth | | | | |
| Lead youth group to clean up a neighborhood | | | | |
| Type reports for volunteer managers or other staff | | | | |
| Process payroll check for staff | | | | |
| Take a dog to visit prisoners at local prison | | | | |
| Sell tickets at a symphony concert | | | | |
| Give advice on how to run a program as part of an advisory council | | | | |
| Administer drugs to a client | | | | |