

Defining Expectations



6. Defining Expectations

Volunteers need to know what is expected of them. You need to clearly communicate your expectations to the volunteer. If you assume that no one volunteers in order to perform poorly, you then need to define what “doing a good job” means.

Maintain High Expectations

If you have high expectations of volunteers you are likely to get good results. Don’t be afraid to challenge volunteers. Let your volunteers know how much you are counting on them and be sure they understand why their work is important. Encourage volunteers to give their best.

Managing the Volunteer and the Role

Your overall role is to manage the task and the volunteer. The following suggestions can assist you to help the volunteer understand the role and establish how you will work together.

- Explain why the work needs to be done and what relationship it has to other work within the WRHA.
- What will happen if the work is not completed as directed? What impact will it have on your program and clients?
- Explain how much latitude there is for creativity.
- Volunteers will be more committed and willing to take on tasks and responsibilities if you explain the importance of the task and how it relates to the program or site plans and objectives.

Clarify Roles

What will you do?

- What will you expect of the volunteer?
- Are expectations clear?
- What resources or materials are available to the volunteer to get the role done?
- When you delegate a task, be sure you give the responsibility and authority that goes with it.

Describe the whole role at once

- Assign work in manageable steps with internal time frames
- Clarify limits;
- Define the level of control (how much authority does the volunteer have to make decisions without “checking in”);
- Build trust by being open, honest and where possible, flexible;

- Make resources and training available;
- Talk about the assignment in terms of results; share what is to be accomplished;
- Communicate any guidelines and assess the volunteer’s understanding of them;
- Ask for suggestions. People support what they help develop; and
- Keep assignments reasonable.

Reporting/Follow-up

In addition to clarifying your expectations regarding the work itself, clearly communicate your expectation about these issues:

- Adhering to an agreed-upon work schedule;
- Meeting productivity standards or deadlines;
- Following established procedures;
- Honoring rules regarding confidentiality;
- Maintaining appropriate relationships with co-workers and clients;
- Reporting work related problems;
- Not doing tasks beyond the identified scope of responsibility;
- How do you want reports? Established deadlines, set up checkpoints;
- How accessible you will be;
- Determine criteria for success, it is important that you and the volunteer reach an agreement on how results will be measured.
- Provide feedback and recognition along the way and at the completion of a project;
- Request a report when the task is done so that the next volunteer will be able to do the role just as well;
- Encourage volunteers to bring problems to you early; and
- Once you have delegated, do not undercut the process.

Discussing Expectations

Plan to meet with each volunteer at the end of his/her first and/or second shift; this gives you the opportunity to:

- Continue building a relationship;
- Clarify your expectations;
- Give praise;
- Express appreciation; and
- Determine additional training needs.

Ask the volunteer to tell you what the experience was like, perhaps asking specific questions about aspects of the work that you know are difficult. This takes time. Remember that volunteers are not “free” and that investing this kind of time in new volunteers has important benefits. You are building

relationships with your volunteers, showing your concern and developing their skills. This will increase their commitment to you and their work.

Supervision and Support

All volunteers must be assigned a supervisor to whom they are directly accountable and on whom they can depend for feedback, guidance, training and evaluation.

The purpose of supervision is to maintain open lines of communication and to ensure that the best service is delivered to WRHA clients. Volunteers want to do a good job and to be appreciated for what they do. Through thoughtful supervision and support you will ensure the volunteer placement is a positive experience.

There are some unique aspects you need to consider when supervising volunteers:

- Volunteers are only available on a limited, part-time basis;
- Volunteers may work at a distance from you and the site;
- If volunteers don't feel supported they can more readily leave.

Supervision can be handled directly and formally, or casually with each person you have working for you. The complexity of the work, the responsibilities and risk involved with the activity will determine the frequency and type of supervisory sessions required.

Supervisory Tasks

1. Preparation and Orientation of the volunteer to the activity

- Share a written activity description with the volunteer;
- Introduce volunteers to staff and other people with whom they work;
- Ensure the volunteer work area is prepared;
- Explain the supervision and evaluation system;
- Manage risk situations; and
- Share relevant policies and procedures.

2. Ongoing Support and Resources

- Train volunteers for their work;
- Provide ongoing, formal and informal appreciation for the volunteer's contribution; and
- Share materials and information needed to support the volunteer in his/her role.

3. Reporting Requirements

Wherever possible, volunteers should notify you at least 24 hours in advance if they are going to be absent.

Volunteers must record their volunteer hours on a time sheet and forward to Volunteer Services, who will keep track of their contributions for volunteer recognition and references.

It is important to notify Volunteer Services:

- **When a volunteer will be taking a "leave of absence" for a significant period of time;**
- **If a volunteer's scheduled day/shift to volunteer changes (on a permanent basis) ;**
- **If a volunteer is no longer active; and**
- **If a volunteer is switching to a different volunteer role.**

4. Evaluation

Though information, evaluation goes on almost continuously in the course of a work period, **it is necessary to conduct an evaluation of the performance of each volunteer. This is to be done formally after 3 months of active volunteer service, on an annual basis, and prior to transferring to another volunteer role or leaving the program.** Since volunteers do not work for monetary incentive, work satisfaction is one of the major factors in keeping a high level of interest and performance. Of equal importance is the WRHA’s need for competent, consistent service from volunteers. Clear evaluation and recognition of the importance of the volunteers can help to meet the needs of all concerned.

Volunteer Performance Reviews

The volunteer performance review is a mutual way to express appreciation, identify problems and needs, and to determine the volunteer’s future involvement with WRHA. A successful performance review provides and opportunity for you to communicate with the volunteer; it allows you to discuss expectations of yourselves and each other.

Increasing numbers of volunteers are seeking to develop and enhance their skills through volunteer work. They are welcoming opportunities to receive constructive feedback and evaluate their work.

Benefit of Performance Reviews

- It is a strong statement about the importance of volunteers;
- Both volunteers and the WRHA are held accountable;
- Volunteers want to be successful and normally respond well to feedback;

- It is an opportunity to express appreciation for the volunteer’s efforts and acknowledge accomplishments;
- It enables you and the volunteer to re-negotiate your working agreement for the next time period;
- It provides an opportunity to discuss plans to improve future volunteer performance;
- It allows volunteers to express concerns and “leave” an unfavorable situation; and
- It allows you to share concerns and “dismiss” the volunteer if the situation requires action.

Elements for Successful Evaluation

- Volunteers should be informed of the performance review system when they start their placement (this is outlined in the Volunteer Handbook);
- Mutuality is the key – it is a time for both you and the volunteer to share your experiences with one another;
- Performance reviews should be based on previously agreed upon standards, the activity description, deadlines, available resources and intervening circumstances;
- The performance review should have no surprises if ongoing supervision and conflict resolution have taken place; and
- It is best to gradually include current volunteers who have not previously been reviewed.

Why Take Action?

Occasionally, you will find that a volunteer has poor work habits or performance issues that have a negative impact on program delivery. Correcting poor work habits benefits you, the volunteer and the WRHA. When working with volunteers you need to support a standard of professionalism and demonstrate that volunteers can and should be held accountable to those expectations.

Dealing with performance issues in a timely manner is important! **The WRHA is liable for the work of volunteers, including mistakes that may cause harm to clients and the organization.** As well, you can lose the respect of other volunteers and staff if you choose not to deal with performance issues. By handling issues in a sensitive and caring manner you are showing your respect for the volunteers, the importance of their work and their desire to do good work.

Identify the Performance Problem

Through regular supervision you can identify problems when they are small and easily correctable – you can support volunteers when they still want to do better. Often the behaviors that become problematic are those that have not been discussed with the volunteer in the first place.

Before you take action, you need to be able to specifically identify the problem. Usually the following are the work habits and performance issues that require intervention:

- Habits that affect the volunteer’s work;
- Habits that affect the work of others;
- Habits that violate WRHA policies or procedures;
- Habits that become annoying or offensive;
- Quality and/or quantity of the work does not meet stated expectations;
- There is a problem adhering to schedules or deadlines; and
- The volunteer is taking an excessively long time to develop competency.

Dealing with Problems

Nearly everybody wants to do a good job and wants to be seen as being competent at what they do.

The following provides a structured approach to addressing work habit or performance issues with a volunteer:

1. Try to handle problems promptly. Problems won’t disappear if you just ignore them. In fact, they are likely to get worse. Don’t “store up” problems, deal with them as they occur.
2. Don’t try to confront difficult situations when you’re so upset that you’re not rational. You need to be at your best: calm, under control, and ready to listen to the response of the volunteer. Be as open and honest as possible. Write down the key points to help you focus and clarify your concerns.
3. Serious reprimands should be carried out in a one-to-one setting.
4. Investigate and describe what you have observed. Evaluate or interpret as little as possible. It is helpful to have an example of the problem behavior you have observed recorded.
5. Be clear about why the habit is a concern. The most effective way to help a volunteer change a poor work habit is to tell the individual exactly why the habit is a concern to you.
6. Ask for the reasons for the behavior and take the time to listen.
7. Use the activity description to identify behaviors. Sometimes it is important to separate the individual from the function or activity in order to make a fair decision.

8. Indicate a shared commitment to finding a solution to problems. The volunteer should hear, “How can we work together to lessen or eliminate the problem?”

9. Offer your support.

10. Agree on a specific plan and arrange for the follow-up. This is part of the coaching assessment and recognition activities that are so important in assuring that problem behaviors don’t recur and that a solution is being worked on.

Ways to Deal with Performance Problems

Probationary Placement

Probationary placements are an excellent way to avoid difficult situations. Identify the first three months of any new assignment as a probationary period. During the first three months of service either you or the volunteer can alter the volunteer activity for any reasonable cause. If the placement does not appear to be appropriate, you can search for another location for the volunteer to utilize his/her skills. This way no one loses face in the process.

Re-assignment

Re-assigning volunteers can frequently alleviate difficult situations. Another volunteer or staff member may not even notice a behavior that one person finds annoying.

Re-Training

Misbehavior may be noticed less than misinformation or a lack of information.

Re-motivating

Re-motivating the volunteer is often an effective solution when an individual has become bored or lost enthusiasm for the role. Re-motivating can be achieved by expanding the activity and offering the person greater responsibility. In some cases, a person may need a leave of absence from the activity and the opportunity to come back renewed and refreshed.

Referring

Referring the volunteer to another organization can address the situation where the volunteer acknowledges a basic philosophical difference between your expectations and their desires.

Terminating the Volunteer’s Involvement

As with paid staff, volunteers leave for many reasons. Either you or the volunteer should feel free to terminate the arrangement as necessary. A volunteer who has insurmountable difficulties in one activity can be referred to the Manager of Volunteer Services or to Volunteer Manitoba for assistance in finding a more suitable placement.

The Decision to Terminate a Volunteer

Yes, volunteers can be fired, but the situation should be regarded seriously and used as cautiously as if the person were salaried staff. Volunteers like paid employees can bring suit for wrongful dismissal and/or defamation of character.

Volunteer Services staff are authorized to initiate corrective action. The degree of action will depend upon the gravity of the concern, the implications for the client’s well being and security of property, and the number of previous incidents. Unless the gravity of the concern dictates otherwise, a volunteer will receive at least three oral/written warnings before action is taken to terminate the volunteer's placement.

Volunteer placement supervisors may terminate volunteers for lack of attendance. All other terminations of a volunteer's placement must have the prior approval of the Manager of Volunteer Services.

All corrective measures, including verbal warnings, will be documented on the volunteer's file. This may include verbal and written warnings and, if necessary, termination of the volunteer.

Examples of the concerns that may lead to an oral or a written warning may include but are not limited to the following:

- Rudeness or unprofessional conduct towards clients/volunteers/staff/general public while on duty.
- Use of abusive, offensive or obscene language.
- Failure to notify, in a timely manner, and provide valid excuse to supervisory personnel of absence or lateness.
- Wasting time or loitering.
- Failure to report personal injury or property damage accidents to supervisory personnel within 48 hours of occurrence.
- Failure to follow safe working practices.
- Contributing to unsanitary conditions or poor housekeeping.
- Unauthorized use of WRHA equipment or property.
- Unauthorized use of WRHA telephone for personal long distance calls, which are not permitted.

- Unauthorized entrance on premises outside the normal hours of operation.
- Entering the premises at times other than one's regular shift without permission of management or security notification.
- Bringing visitors onto the premises during their shift without permission from management.
- Does not perform the work as required and coaching/mentoring has not been effective.
- Does not work well with other personnel.

Terminating a volunteer is not pleasant. However, failing to correct a bad situation is not fair to the other volunteers and staff working hard to be productive and support the work of the WRHA.

Questions to Consider in the Termination Process

1. Does the volunteer have a current activity description?
2. Does the volunteer understand his/her role?
3. Has the volunteer participated in orientation and training?
4. Could this situation be remedied by having the volunteer return to an orientation and/or training program?
5. Does the volunteer have a designated, accessible supervisor who knows how to supervise volunteers?
6. Have you previously documented the problem in writing, shared it with the volunteer and discussed ways to avoid this situation in the future? (This action would not be appropriate if the volunteer had done something serious.)
7. As you have explored the nature of the problem have you convened all the parties involved in the situation at the same time so that all sides of the situation can be examined together?
8. Have you created an action plan to resolve the situation and has the responsible person met with the volunteer as specified in the action plan?
9. Have you involved the appropriate WRHA staff in this situation?
10. Have you explored the implications of terminating this volunteer in terms of:
 - The life situation of the individual?
 - The impact of this action on your program, the WRHA, and clients?
 - The impact of inaction on this situation or your program, the WRHA and clients?

11. Have you exhausted all possibilities that would make this action unnecessary?
12. Have you taken steps to minimize or contain the damage that may result from this decision?
13. What organizational support, if any, do you need to implement this decision?

Ongoing Support

Volunteers who are in high risk, high stress activities need ongoing support.

Having support meetings provides volunteers who do similar work the opportunity to talk about their work, especially the feelings their work arouses.

Group Meetings

If you supervise a lot of volunteers you may want to schedule regular meetings with your volunteers. These meetings can be used to:

- Share information with volunteers;
- Discuss questions and concerns; and
- Collect and discuss volunteer reports about their work.