



Everyone Ready®

An online volunteer management
staff development plan

FROM ENERGIZE

Online Seminar Trainer's Handouts

Effective Supervision: A Seminar for Busy Staff Who Partner with Volunteers

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Cultural/Attitudinal Scan Worksheet



This worksheet will help you to assess your organization's culture and attitudes about supervision.

- Place a mark on the scale provided for each reply based on your own observations and impressions of: (1) your specific work area or department, and (2) on your organization as a whole.
- You may wish to ask other members of your organization to complete copies of this worksheet, and compare their ratings to your own.

1. How are supervisors rewarded for helping their staff and volunteers to be successful?

- In your work area:*

←-----→

Rewards based on
personal success only
(*doing is rewarded*)

Rewards based on
staff/volunteer success only
(*partnership/delegation is rewarded*)

- In your organization as a whole:*

←-----→

Rewards based on
personal success only
(*doing is rewarded*)

Rewards based on
staff/volunteer success only
(*partnership/delegation is rewarded*)

2. How are supervisors rewarded for taking a coaching role, rather than micro-managing the staff's and volunteers' work?

- In your work area:*

←-----→

Rewarded for micro-managing
staff/volunteers

Rewarded for coaching and
empowering staff/volunteers

- In your organization as a whole:*

←-----→

Rewarded for micro-managing
staff/volunteers

Rewarded for coaching and
empowering staff/volunteers

3. How are supervisors expected to involve their staff and volunteers in making decisions?

- In your work area:*

←-----→

Supervisors expected to make
decisions on their own

Supervisors expected to involve
staff/volunteers in decision-making

- In your organization as a whole:*

←-----→

Expected to make
Decisions on their own

Expected to involve
staff/volunteers in decision-making

4. How would you rate yourself or another supervisor on these attitudinal indicators?

- Make volunteers feel like partners and vital contributors.

←-----→
Never Sometimes Always

- Encourage other staff or volunteers to excel, even if the staff or volunteer skill levels eventually exceed my skills.

←-----→
Never Sometimes Always

- Willing to invest time and resources to orient, train, and develop staff or volunteers.

←-----→
Never Sometimes Always

- Believe expectations are set for mutual accountability between supervisor and volunteer.

←-----→
Never Sometimes Always

- Focus on solving problems with volunteers/staff rather than looking for someone to blame.

←-----→
Never Sometimes Always

5. Are you satisfied with the scores on this worksheet?

If not, consider this. While change in organizational culture ultimately requires action by those at the top, you personally can impact supervisory attitudes in your job at a program, or work-group level. Rather than waiting for someone else to change the culture, you have the power to initiate change from the ground up. Here's how to get started:

- Circle one or two items on this worksheet to prioritize.
- For each circled item, write down:
 - What is a reasonable improvement goal? (Specify: how much you aim to accomplish, by when, and how will you know when you have reached the goal?)
 - What will you need in terms of time, resources, and authority to work on this goal?
 - What is the first step you will need to take to get the improvement process in motion?

Supervisory Tasks and Processes Scan

Use this worksheet to identify gaps in the way supervisory tasks are assigned and/or handled within your organization. Select one volunteer position you supervise and walk through tasks and processes involved in supervising this volunteer to determine clarity on who is responsible for the tasks being accomplished. Discuss with appropriate team of staff involved in volunteer supervision.

On the worksheet below, indicate who is responsible for each task:

- Check the “You” column if you are responsible for the task.
- If someone else is responsible, enter that person’s name in the “Who” column.
- If you do not know who is responsible for a task, put a question mark in the “Not Sure” column.

Then go to the next page to consider the implications of your answers.

Task	Who Is Responsible?		
	You	Who	Not Sure
Creating volunteer positions			
Selecting the best-suited volunteer for a position			
Orienting newly-placed volunteers to the organization			
Explaining individual job expectations and procedures			
Providing skills training			
Developing leadership volunteers			
Helping volunteers solve problems			
Evaluating and providing performance feedback to volunteers			
Providing recognition for good performance			
Making sure volunteers record hours and activities and report that data as well as impact of volunteer work			
Collecting volunteer feedback			
Conducting exit interviews			

Implications of a Supervisory Tasks and Processes Scan

1. Look at the items in the “You” column.

These are the tasks that are your responsibility. For each of these tasks:

- a. Have you been given clear performance expectations and guidance about how you are supposed to execute it?
List any tasks in which you could use additional guidance:
- b. Have you outlined a clear and consistent process for how to handle the task in your department?
- c. Do your staff and volunteers clearly understand your process?
List any tasks that you, your staff and volunteers might benefit from reviewing, in order to clear up any potential misunderstandings:

2. Look at the tasks in the “Who” column.

Do your staff and volunteers know who is responsible for each item in the “Who” column? *List any tasks for which there may be some confusion about who is in charge:*

3. Look at the tasks in the “Not Sure” column.

- a. How are these tasks currently being handled?
- b. List any tasks in which the lack of clear leadership is affecting you, your staff or your volunteers:

4. Finally, look at all of the tasks on the table.

Are there tasks on the list that should be handled better, more efficiently, or on a different schedule? *Write any suggestions for improvement below:*

- 5. Using this assessment, you can now work with your management and other supervisors to **clarify expectations and provide guidance** to everyone involved.

Supervisory Skills Assessment Sheet

This and the following page are worksheets that can be used both by you to self-assess your overall supervisory skills and by a volunteer or other supervisor to evaluate you. Make as many copies as you need for either or both purposes. You may adapt the list of skills/tasks as appropriate to your setting.

- Start by rating yourself.
- Ask your paid staff and volunteers to rate you.
- Ask your manager to rate you.

Use the ratings to identify areas of weakness that you should work to strengthen.

Supervisor being assessed: _____

Are the statements below true for this supervisor (me)? Please make a check mark in the appropriate column to indicate whether each statement is:

- Always true
- Sometimes true
- Never true
- Not applicable

Planning

<i>This supervisor (I)...</i>	Always	Sometimes	Never	Not Applicable
Makes sure that work and supplies are prepared for the start of each shift.				
Keeps track of attendance and schedules.				
If out of the office, arranges for someone else to be available to answer questions.				

Listening/Communicating

<i>This supervisor (I)...</i>	Always	Sometimes	Never	Not Applicable
Asks appropriate questions, both during interviews and after the volunteer has begun working.				
Listens to volunteer comments without interrupting.				
Asks follow-up questions to clarify understanding.				
Responds to volunteer comments in a pleasant, clear, appropriate manner.				

Supervisory Skills Assessment Sheet

(continued)

Delegating

<i>This supervisor (I)...</i>	Always	Sometimes	Never	Not Applicable
Provides clear expectations when delegating work about the quality and schedule for completing the work.				
Refrains from micro-managing work that has been delegated.				

Training

<i>This supervisor (I)...</i>	Always	Sometimes	Never	Not Applicable
Makes sure that volunteers receive the necessary knowledge and skills to perform an assignment successfully.				
Makes sure that new volunteers understand who else will be involved in an assignment and what each person's role will be.				

Coaching

<i>This supervisor (I)...</i>	Always	Sometimes	Never	Not Applicable
Shows volunteers how to do their jobs better, faster, or more efficiently.				
If obstacles arise that impede volunteers, shows appropriate work-arounds.				

Giving Feedback

<i>This supervisor (I)...</i>	Always	Sometimes	Never	Not Applicable
Gives feedback that is specific and timely.				
When correcting a volunteer, expresses feedback in a way that is positive and non-judgmental.				

Evaluating

<i>This supervisor (I)...</i>	Always	Sometimes	Never	Not Applicable
Confronts poor performance, rather than allowing it to continue.				

Giving Recognition

<i>This supervisor (I)...</i>	Always	Sometimes	Never	Not Applicable
Recognizes good performance in a manner that is appropriate to the individual volunteer.				
Provides recognition that is both specific and timely.				

Off to a Good Start

Staff Checklist for Preparing and Welcoming Volunteers

Pre-arrival...

- ☐ Prepare department orientation and training
- ☐ Have work space and necessary supplies ready
- ☐ Notify other paid and unpaid staff about the volunteer and the job s/he will be performing
- ☐ Identify a "buddy" (employee or volunteer) to be available for volunteer when you are busy or out of the office

On the First Day...

- ☐ Welcome the volunteer immediately upon arrival
- ☐ Explain how the office, phone system, and department function
- ☐ Introduce volunteer to people in the work area, how they function together, and how the volunteer assignment will benefit the department
- ☐ Show volunteer his/her work location and where personal belongings can be stored
- ☐ Review job description and start volunteer on specific work or begin any necessary detailed, job-specific training
- ☐ Identify any physical risks involved in the task(s)
- ☐ Check periodically with the volunteer to answer any questions, be of any assistance or offer encouragement
- ☐ Make certain that someone says, "Thank you!" at the end of the volunteer's day

Don't Forget to...

- ☐ Explain confidentiality and other appropriate organizational, departmental, or legal policies
- ☐ Explain emergency procedures for the office
- ☐ Discuss parking locations/regulations
- ☐ Discuss appropriate work apparel
- ☐ Remind volunteer of importance of recording hours on time sheets
- ☐ Show where closest restrooms, lunch-room, coffee, etc. are located
- ☐ Set up procedures for the volunteer to notify supervisor of illness or vacations
- ☐ Set up procedures for you to notify the volunteer of your absence with information on how this affects his/her work
- ☐ Confirm volunteer's ongoing schedule
- ☐ Be certain that the volunteer has signed all pertinent volunteer agreements, waivers, and other forms, and that copies have been returned to the Volunteer Resources Office

Steps for Staff to Obtain Volunteer Assistance

1. Fill out the “Staff Request for Volunteer Assistance” form.

If it is an ongoing, previously registered position, simply fill out any new information needed to activate the request. The volunteer program coordinator will be in touch with you to gather any additional information needed before recruiting for the right candidate(s). Remember to allow time to find the best volunteer for your position.

Or...

If this is a newly-created position, it may be best to start by discussing it with the volunteer program coordinator and work together to design the assignment as clearly as possible.

2. Interview prospective candidates.

The volunteer program coordinator will recruit and pre-screen candidates for the above position(s) and will arrange for you to meet him/her/them so that you can do a final interview to determine if this is a good match all around.

Suggested questions for your interview with prospective candidates:

- ☞ Why are you specifically interested in this position and how are you qualified for this position?
- ☞ What would you like to learn while volunteering here?
- ☞ What style of supervision do you prefer?
- ☞ How would you handle _____? (*Describe a situation that might occur while they are volunteering and discover how they would handle it.*)
- ☞ What are your greatest strengths as they relate to this job?
- ☞ What concerns do you have about performing this job?
- ☞ What information and training would be useful for you to have so that you would feel comfortable performing this job?

3. Decide whether you have the candidate to whom you wish to offer this volunteer position.

If you are satisfied, inform the applicant that you would like to welcome her or him as a volunteer. Sign any volunteer/staff agreement and have the volunteer return it to the Volunteer Resources Office so that any final waivers or general orientation can take place and the person will be officially enrolled as a volunteer. Thank the new volunteer and set up a starting date.

Or...

If the candidate is not the best match for your position, refer him or her back to the Volunteer Resources Office for possible consideration for other positions. Thank the applicant for his/her interest and time.

The Role of Staff in the Ongoing Supervision of Volunteers

1. One-Month Evaluation

Establish a convenient time, approximately one month after a volunteer starts, for a mutual performance appraisal. The focal point of this discussion is to review and update the volunteer's position description and the agreement form signed by both parties at the initial interview. Suggest any adjustments and changes to improve the working relationship. If the volunteer is not able to keep his/her commitments or perform the assigned tasks, refer him/her back to the volunteer program coordinator for possible placement into a different position.

2. Ongoing Support

Your goal is to provide resources, guidance, and feedback to enable the volunteer to be successful in her/his work. This should be done in a timely, supportive fashion.

3. Recordkeeping

Remind the volunteer of the importance of keeping monthly time and activity sheets for insurance purposes and to assess the impact of the efforts of all volunteers.

4. Ongoing Recognition

The organization's annual recognition event is a formal acknowledgment of volunteers, but it should always be supplemented by your personal, spontaneous acts of appreciation at the time good work is done.

5. Exit Interviews When Volunteers Leave

When a volunteer leaves his/her position, it is helpful to have a face-to-face or telephone exit interview to discuss why and to thank the volunteer for service up to that point. If this is not possible, ask the volunteer to fill out an exit survey form (can be by e-mail or postal mail) and return it to the Volunteer Resources Office. The purpose of gathering this information is to provide feedback and guidance to strengthen our volunteer program.

6. Dismissal of a Volunteer

If a volunteer is not performing well after expectations have been made clear and supervisory coaching provided, it may be necessary to request that s/he be transferred to another position or released entirely from the volunteer program. In these rare situations, contact the Volunteer Resources Office for assistance.

Recognition Tips

Recognition



Apart from an annual, organization-wide event:

- Immediate appreciation
- A sincere “thank you” for specific work
- “I noticed you”

Recognition Tips

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Part 2 of 3

Quick and Easy Ways to Express Appreciation

Great idea! -- note taped to a light bulb

It's easy to measure the difference you've made. -- ruler or tape-measure

Your ideas are so exciting, I could just pop! -- attached to a balloon

No one holds a candle to you. -- scented votive candle or pack of small birthday candles

You're a lifesaver! -- Roll of Lifesaver™ candies or small first-aid kit

Thanks for raisin' the tough questions! -- mini box of raisins

Your vision is our guiding light. -- mini-flashlight

You have given our project the sweet smell of success! -- potpourri or sachet packet

We grow luckier every day you're with us . - or - Thank you for helping us grow. -- a small live plant

You rock! -- small bag of pebbles

You are worth a mint .-- candy mints

Close

Giving Feedback Example

Skill: Giving Feedback



You always talk way above people at committee meetings. Stop being so overbearing.

I was alarmed at last night's meeting that some committee members could not follow your presentation. Perhaps we could find some different approaches to keep their interest and attention.



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Part 3 of 3

Text box when left word bubble clicked:

This statement is not specific enough to explain what exactly the employee did wrong. Also, it dwells on the negative rather than suggesting an alternative, more positive behavior. The employee who receives this feedback is likely to respond by becoming defensive, rather than seeking to make a change.

Text box when right word bubble clicked:

By starting out with "I was alarmed," the supervisor is signaling that he or she "owned" the feedback, and was personally and emotionally involved in correcting the problem.

By explaining that the problem occurred in "last night's meeting" and that "board members could not follow your presentation," the supervisor is giving specific indication of what went wrong and needs to be corrected.

By ending with "Perhaps we could find different approaches to keep their attention," the supervisor is explaining what behavior is required going forward and also explaining that he/she wants to be involved in working toward improving behavior.

Further Resources on Supervision

The following are resources for more in-depth learning about this topic.

See two areas of the Energize, Inc. Web site for articles, links, and shared advice from colleagues on supervision: <http://www.energizeinc.com/art/subj/super.html> and <http://www.energizeinc.com/supervising.html>.

Books

Chapman, Elwood. *The New Supervisor: Stepping Up With Confidence (A Crisp Fifty-Minute Book)*. Crisp Learning, 2002.

Lee, Jarene Frances with Julia Catagnus. *What We Learned (the Hard Way) About Supervising Volunteers*. Philadelphia: Energize, Inc., 1998. (Use your *Everyone Ready* discount in the Energize Online Bookstore, www.energizeinc.com/bookstore.)

Graff, Linda L. "Supervision and Ongoing Placement Support." Chapter 9 in *Best of All: The Quick Reference Guide To Effective Volunteer Involvement*. Dundas, ON: Linda L. Graff & Associates, 2005. (Use your *Everyone Ready* discount in the Energize Online Bookstore, www.energizeinc.com/bookstore.)

McCurley, Steve and Rick Lynch. *Volunteer Management: Mobilizing all the Resources of the Community*, 2nd Ed. Kemptville, ON: Johnstone Training and Consultation, Inc., 2006. (Use your *Everyone Ready* discount in the Energize Online Bookstore, www.energizeinc.com/bookstore.)

McCurley, Steve and Sue Vineyard. *Handling Problem Volunteers: Real Solutions*. Downers Grove, IL: Heritage Arts Publishing/VMSystems, 1998. (Use your *Everyone Ready* discount in the Energize Online Bookstore, www.energizeinc.com/bookstore.)

Articles and Reports

Remember to access any *e-Volunteerism* article listed here by clicking through from your *Everyone Ready* Main Page.

Cravens, Jayne. "Communicating with Volunteers: Making the Most of Your Options." *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. V, Issue 3, April 2005.

Ellis, Susan J., and Steve McCurley. "Family Feud: Relatives, Co-Workers and Friends as Volunteers." *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. V, Issue 4, July 2005.

- Ellis, Susan J. and Steve McCurley. "How Many Supervisors Does it Take to Screw in a Volunteer?" *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. IV, Issue 1, Oct-Dec 2003.
- Ellis, Susan J., and Steve McCurley. "What Volunteers Do to Each Other Is Not Always Pretty." *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. V, Issue 2, January 2005.
- Elliston, Sarah. "Integrity – The Guide Post to Volunteer Relationships." *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. III, Issue 1, October-Dec 2002.
- Fujie, Gwen. "Tongue Fu! How to Deflect, Disarm and Defuse Verbal Conflict." *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. VIII, Issue 1, October 2007.
- McKee, Thomas W. "Managing the Non-Volunteer Volunteer." *e-Volunteerism: The Electronic Journal of the Volunteer Community*. Vol. VIII, Issue 4, July 2008.
- Oncken Jr., William and Donald L. Wass. "Management Time: Who's Got The Monkey?" *Harvard Business Review*, Nov.1, 1999.
- United Parcel Service Report. *Managing Volunteers*. 1998.
<http://academic.regis.edu/volunteer/specialcollection/SpecFiles/1998UPSsurvey.pdf>

Other *Everyone Ready* Resources

Depending on your organization's level of membership and time in the program, the following might be available now in your *Everyone Ready* archive – or are being refreshed for re-release in the coming year.

- Handling Challenging Behavior by Volunteers – *Seminar*
- Volunteer Performance Assessment – *Self-Instruction Guide*
- It Takes Two to Tango: Building Successful Relationships Between Volunteers and Paid Staff – *Self-Instruction Guide*
- Keeping Volunteers Motivated (So They Stay!) – *Seminar*
- First Days Count: Orienting and Welcoming Volunteers for Success – *Self-Instruction Guide*
- Bridging the Gap between Volunteers and Employees: Keys to Effective Partnership – *Seminar*
- Generations: Adapting to Volunteers of Different Ages – *Seminar*

About the Trainer



Betty B. Stallings, M.S.W., is a highly regarded international trainer, keynote speaker, consultant, and author specializing in volunteer management, fundraising, leadership and board development. She teaches at universities, provides training for state, national, and international conferences and consults with many non-profit organizations, public programs, and foundations. Participants in her audiences and seminars note her vitality, inspiring message, engaging humor, practical presentations, and valuable resources

For the past 18 years, Betty has been the president of Building Better Skills whose mission is to inspire and empower people to effectively attract and utilize volunteer and financial resources to achieve their organization's mission. Her Web site is www.bettystallings.com where she gives free training resources and carries some of the best books and resources supporting volunteerism and fund

development.

Betty has received numerous awards for her dedication to volunteerism and philanthropy, has previously written six books and many training curriculums and articles. Among the best-known titles are *Getting to Yes in Fundraising*, *Training Busy Staff to Succeed with Volunteers: The 55-Minute Staff Training Series*, and *How to Produce Fabulous Fundraising Events: Reap Remarkable Returns for Minimal Effort*. In 2005, she researched the impact of executives on successful volunteer involvement. Energize, Inc. published the results of that study in the free e-book *12 Key Actions of Volunteer Program Champions: CEOs Who Lead the Way*. Betty latest book (September 2010) focuses on the critical role that executive staff must play to ensure effective volunteer involvement: *Leading the Way to Successful Volunteer Involvement: Practical Tools for Busy Executives*.

Since 2000, Betty has served as the editor/designer in charge of the "Training Designs" feature section *e-Volunteerism: The Electronic Journal of the Volunteer Community*.

A lifelong volunteer, Betty also founded and was the fourteen-year executive director of a volunteer center in the San Francisco Bay Area. While at the center she initiated programs which served as national models for volunteer utilization and also obtained funding and supervised innovative research on volunteer management resulting in her volunteer center's publication of the book, *At the Heart—The New Volunteer Challenge to Community Agencies*.