



*Everyone Ready*®

An online volunteer management  
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# Middle Managers: Their Vital Role in Volunteer Success

By Susan J. Ellis

## Self-Instruction Guide

for Individuals and Teams



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# Middle Managers: Their Vital Role in Volunteer Success

By Susan J. Ellis

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**"But, what if...?"**

Ask **specific**  
**questions** related to  
*your* organization.

See page 12 for  
details.

## IDEAL AUDIENCE FOR THIS GUIDE

This Self-Instruction Guide has been written for an audience that is often overlooked in volunteer management literature: ***middle managers***—the people who oversee other staff members or lead volunteers who supervise volunteers on the front line. Middle managers may be:

- Branch, chapter, or affiliate directors
- Department heads or unit supervisors
- Regional coordinators overseeing field staff

In the same vein, managers or directors of volunteer involvement are also “middle managers” because they recruit and then place volunteers throughout the organization to work under the supervision of frontline staff or leadership volunteers. So the volunteer program manager acts as a “liaison” resource to those who work with volunteers directly, day by day. This Guide will also help individuals in that role.

## LEARNING OBJECTIVES

After reading this Guide and discussing its content, participants will be able to:

- Recognize the important role middle managers play in creating successful volunteer engagement – specifically how their knowledge and beliefs about volunteering can determine a positive or negative culture about working with volunteers.
- Learn to support frontline staff in designing positions for volunteers and ensuring volunteer roles are clearly defined.
- Discover ways to teach and coach employees to supervise volunteers effectively.
- Recognize when acting as a third party between the employee and any volunteers can help staff/volunteer relations.
- Consider monitoring and evaluating staff performance in leading volunteers to maintain strong volunteer performance.

## HOW TO USE THESE SELF-INSTRUCTION GUIDES

- *Everyone Ready*® selects a several-page chapter, excerpt, or article from a respected source, often fresh material just published or newly revised, to become the “Featured Reading” on the chosen topic for each Self-Instruction Guide.
- Read or complete each section of the Guide *in the sequence presented* – the order of the elements matters to the success of the learning experience. First, you will find preparatory information that sets the topic into context and a pre-reading self-assessment. Then the Featured Reading(s) are presented.
- The material following the Featured Reading(s) updates and expands the original writing and has been developed specifically for *Everyone Ready* participants. It includes further resources, ways to test your understanding, and a post-reading self-assessment.
- Recommendation: Consider forming a study group or learning team so that you benefit from the synergy of discussing the material with others in your program. Sharing your ideas aloud reinforces the learning and lays the groundwork for actually implementing many of the ideas developed.

## PRE-READING ASSESSMENT

*Reflect on your answers to the questions below on key issues relevant to your role as a department head or middle manager when supporting staff who supervise volunteers.*

*(Volunteer program managers: Reflect on how middle managers might answer and what you can do to support the middle managers in your organization.)*

1. How informed do you consider yourself to be about best practices in working with volunteers?  
☐ Very ☐ Moderately ☐ A little ☐ Not at all

2. My knowledge comes from:

☐ First-hand experience in working with volunteers, but no formal training

☐ In-service training about managing volunteers

☐ Reading volunteer management literature

☐ "Life experience," including volunteering I personally do/have done elsewhere

3. Are you clear about why your organization involves volunteers, what the goals and objectives are for that involvement, and what the expectations are of all staff for making volunteer engagement successful?

☐ Yes ☐ Somewhat ☐ No

*How did you learn this? (Check as many as apply.)*

☐ Executives have developed clear expectations in writing.

☐ These issues are discussed in leadership and planning meetings.

☐ I watched and learned from others.

☐ It seems intuitive.

4. Do you understand how your specific department can benefit from involving volunteers?

☐ Yes, when planning objectives for the department I consider what roles volunteers can play in meeting those objectives and encourage my staff to implement such roles.

☐ Somewhat, though I generally rely on my staff to propose roles volunteers can fill.

☐ No, I try to find room for volunteers because I know my organization expects all units to "use" them.

5. Do you have a volunteer assigned directly to *you* to help with your work in any way?  
If not, why not?

6. Which of the following reflect your opinions of volunteers in your branch/department/unit?  
(Check as many as apply.)

Volunteers...

☐ Are generally pleasant but unprofessional

☐ Take a lot of our time

☐ Are worth the effort

- ☐ Drain time from our priority work
  - ☐ Are an integral part of our work team
  - ☐ Come to us with many useful skills and talents
  - ☐ Generally need to be trained before they can be helpful
  - ☐ Raise issues of confidentiality and risk management
  - ☐ Are more highly educated or experienced than our paid staff
  - ☐ Contribute skills that expand the abilities of the staff to help our clients
  - ☐ Matter to the recipients of service
  - ☐ Give us new perspectives and feedback on our work
  - ☐ Want input on things they know very little about
  - ☐ Boost our morale and enthusiasm
  - ☐ Aren't what they used to be
  - ☐ Need more physical space and supplies than we have
  - ☐ Make us a better unit
  - ☐ Divert us from accomplishing goals
  - ☐ Can be positive or negative depending on the volunteer, and we can't count on the volunteer resources office to recruit people with consistent quality
7. Do you know which staff members who you supervise have been trained in how to work with volunteers? Is the responsibility to supervise volunteers in their job descriptions?
8. How often do you speak with staff about their work in supporting volunteers? Is this a regular topic in your supervision meetings? Is it a factor in your annual performance reviews?
9. What recognition, rewards, or possible negative feedback might you be giving to staff about spending time with volunteers?
10. Do you include volunteers in staff meetings or ever meet with them as individuals yourself?

## UNDERLYING PRINCIPLES

There are many contributors to the success of volunteer involvement in an organization. At the highest levels, the executive staff and the board of directors must engage in expressing a vision, developing policies, allocating resources, delegating responsibility, and monitoring the effectiveness of the entire process. Appropriately, staff may be hired as designated volunteer program managers, with primary responsibility for assuring best practices in recruiting and working with volunteers. But they cannot do it alone!

Volunteer resources offices generally operate on the same model as a “human resources” or personnel office: finding qualified people, doing initial screening, matching available positions to the best candidates (and vice versa), but then *referring the applicant on* to the direct supervisor at the work “site.” The final decision about hiring or accepting the person lies with the people on the front line. Once approved, the human resources office orients the newcomer, begins a recordkeeping process on his/her work and time, and completes necessary paperwork, but expects the direct supervisor to be responsible for the worker from that point on. This is exactly what the volunteer resources office does: The day-to-day supervision of the volunteer worker is done by the assigned supervisor, although the central volunteer office maintains a liaison relationship on administrative matters.

Many organizations have developed volunteer management training for the people who partner with volunteers as a part of their role. Too often, however, a piece of the puzzle is missing: **training middle managers on best practices of leading volunteer involvement**. Branch directors, department heads, unit supervisors, and other middle managers are key to how effective the organization’s volunteer engagement will be. They can affect the success of volunteer involvement for the following reasons:

- They convey overt and subtle messages to their staff members about work expectations, setting the tone for how things are done in their corner of the organization. Their personal belief in and attitudes about volunteers will shape the way they support (or undercut) staff/volunteer teamwork.
- Because middle managers train new employees to do their jobs properly and evaluate employee work performance, they have substantial influence over how people approach any area of responsibility, including involving volunteers.
- Middle managers have the authority to approve work assignments created for volunteers by the staff. If their general image of volunteers is that they are mainly nice but not very skilled, employees in their unit may design volunteer positions with low expectations (and self-fulfilling prophecy will produce volunteers who don’t care to be challenged). Conversely, if the manager raises the bar on what volunteers will be asked to do, the organization will attract more highly qualified people.
- If the manager never spends time in staff meetings discussing how to encourage, lead, and motivate volunteers, employees can get the message that spending time with volunteers is a diversion from their “real job,” to be done (if they wish) only after more important work is completed.
- The department manager has an opportunity to visibly recognize and reward staff who help volunteers to shine.

Most middle managers and the staff reporting to them undoubtedly have full workloads and are stretched thin already. Adding volunteers to the mix, while of great potential value in the long run, is not easy and definitely takes time. So the goal is to make sure *the benefits of volunteer involvement outweigh the effort*. Middle managers are vital in monitoring this balance and establishing the importance of community engagement.

## Why Engaging Volunteers Benefits the Department

Let's be honest. For some middle managers, engaging volunteers is not on their radar screens. They may think it's really not worth the effort and just one more "task" to get done. Some may understand why the organization as a whole wants to include volunteers, but they don't see how volunteers can help their departments or units specifically. Although work areas in one organization can have vastly different goals and objectives, there are still some universal principles to think about when assessing if volunteers can add value to current services and projects.

1. No matter how skilled and dedicated the paid staff, there will always be some types of expertise they do not have. Volunteers can be recruited specifically to do what staff cannot (speak another language, run a Facebook page, repair toys, etc.)—or to provide the intensive attention to one client or one project that the staff cannot devote while handling all their other responsibilities.
2. Middle managers find ways to accomplish projects at the bottom of the to-do list when they recognize the wealth of skills that community members are willing to offer. The number of individuals looking for pro bono and highly-skilled volunteer work is at an all-time high, which also means that volunteers can be asked to consult with and train staff to do new things.
3. Some roles, such as community outreach or advocacy, may be accomplished more successfully by someone who is unpaid because of the "perception of credibility" in the eyes of the public, legislators, donors, and others that comes from not gaining financial benefit from their efforts.
4. Involving volunteers and ensuring they are recognized appropriately attracts attention to accomplishments in the department and the hard work of the paid staff as well. It also provides in-house advocates to support ideas proposed by the unit.
5. It's easy to be out of touch from the reactions or feedback of the community or the beneficiaries of services. Involving volunteers provides access to different perspectives and representatives from the outside world. Not to mention that volunteers are an ongoing source of fresh ideas.

## How Middle Managers Can Support Their Staff and Volunteers

There are four major roles for middle managers in the volunteer engagement process:

- 1) Designing work for volunteers
- 2) Teaching and coaching in supervision skills
- 3) Acting as a third party
- 4) Reinforcing expectations and recognizing staff efforts in working with volunteers

### 1) Designing Work for Volunteers

Managers will benefit greatly by starting from defining volunteer roles that need to be filled rather than trying to find work for a random volunteer handed over by the volunteer program manager. It does take skill to craft assignments for volunteers because volunteers can be so diverse (in age, education, background, etc.) and work so many different schedules. Therefore, the organization's volunteer program manager can be a very helpful consultant in this process. In guiding team members, the important things that middle managers can do to support staff in designing volunteer positions are:

- Making sure that the work is clearly defined and not some vague "need volunteer help" statement. Writing a specific volunteer position description ensures that:
  - There really is an assignment needed to be filled in this area.
  - A volunteer who is qualified or interested in this specific work can be recruited.

- The paid staff has thought through what will be needed to make the volunteer successful.
- Minimizing prejudice and stereotypes about volunteers. Volunteer opportunities will be based on whom the staff picture in their minds when they hear the word “volunteer.” So if they think of all volunteers as kindly old ladies who dislike computers, they will consider only a narrow type of work to assign to them. One way to combat this thinking is to challenge staff to ask “what needs to be done?” *not* “what can a volunteer do to help?” If staff members focus on the needs of the clients and themselves, with emphasis on things that can be done in short time segments or without strict deadlines, they will be more innovative in what they suggest might be done. Then, recruitment of volunteers will result in attracting more highly and specifically qualified people who may be intrigued by more challenging work. It’s a spiral that the middle manager can direct up or down.
- Avoiding smokescreens such as confidentiality or risk and liability. Volunteers are neither innately prone to gossip nor inherently risky. Middle managers sometimes block creative volunteer projects on the basis of “rules” or concern about control. It’s fine to practice risk management, but not risk *avoidance*. Many issues like this are better solved by careful screening for the right volunteers, a strong training program, and close supervision, than by refusing to let any volunteer take on a demanding assignment.
- Encouraging staff to look at volunteers as team members rather than helpers or assistants. For example, one powerful model is to consider volunteers, especially highly skilled ones, as *consultants*. This means that not all volunteers will work “under” staff supervision. Some may be more qualified in a task than anyone on the paid staff and therefore the volunteer will be the coach and the employee the learner. Some volunteers may be running a project independently and need a liaison or reporting relationship with the employee.
- Ensuring that staff and volunteers have access to resources. All volunteer positions imply the availability of appropriate space, equipment, and supplies. You cannot simply create a work assignment, bring in new volunteers, and then forget that they need someplace to sit, a computer (or anything else necessary) to use, etc. But frontline staff are usually not the ones who can initiate requisitions for these sorts of things. The middle manager needs to pay attention to the physical environment and make sure that volunteers have the tools they need to be productive, without having to beg, borrow, or steal them from employees.
- Assigning volunteers to help *them* in *their* own work. If middle managers do not lead by example, the implication is that volunteers can only contribute at the lower levels of the organization (except, of course, for the board of directors -- volunteers themselves -- at the very top). By being role models for their staff reports, middle managers can demonstrate how professionally qualified volunteers can offer services, and having to supervise volunteers directly is a perfect way for these managers to gain understanding of what support the staff may need in turn.

## 2) Teaching and Coaching in Supervision Skills

The Featured Reading that follows this section outlines some of the volunteer supervision skills that employees need to learn. Keep in mind, however, that some employees have never supervised *anyone* before, paid or not. So it may be best for middle managers to start with an assessment of where each person who reports to them falls on the spectrum of supervision experience.

One thing is true: everyone knows about *being* supervised! That’s the starting point. Either in a group meeting or one-on-one, the manager can talk with employees about their personal experiences with supervisors they have known (including this manager!):

- What do they feel distinguishes a “good” supervisor from a poor one?
- How does a good supervisor interact with employees?



- How does a good supervisor establish expectations, create a positive work environment, and other intangibles?

After discussing supervision in paid work, the next step is to find out about everyone's experience *as a volunteer* (either currently or in the past). What do they (did they) want from their leader or supervisor in this situation?

Everyone may be surprised that the wish lists are pretty much the same from both discussions. That's when the points in the Featured Reading can be introduced. The concept to get across is that everything that makes employees productive applies to making volunteers productive, *except*...some things require extra emphasis. Also, depending on the skill level and assignment of the volunteer, the best model may not be traditional "supervision," but rather partnering, coaching, or consulting.

On a daily basis, as the middle manager witnesses various interactions between staff and volunteers, she or he can use such "teachable moments" to coach both groups in more effective ways to develop teamwork.

### 3) Acting as a Third Party

There may be times that the middle manager must act as an objective third party to settle disputes between an employee and any volunteers he or she supervises, or facilitate discussions in which there are differing or conflicting perspectives (just as when the situation involves two or more employees). The basic principles are the same even if a volunteer is one of the parties, but be aware of two opposing pitfalls:

- Although it's legitimate to want to show loyalty to employees, especially as they are on site for 35-40 hours a week while the volunteer may be present for only a few hours, each situation should be considered on its own merits without assuming that the employee is always right or always has the greater stake in the outcome.
- Conversely, it's easy to assume that the organization should be grateful for any time given "for free" and therefore should not confront poor behavior by a volunteer. In fact, it's more positive to believe that the volunteer wants to and is capable of doing the best work. So an employee who is trying to set high standards (see more on this in the next section) deserves management support. If the volunteer is in the wrong, be willing to say so.

Again, the centralized volunteer program manager or volunteer services department should be seen as an ally who can also be a third party, especially if you are leaning towards asking for the volunteer to be reassigned or even terminated.

### 4) Reinforcing Expectations and Recognizing Staff Efforts in Working with Volunteers

Once a department or unit's staff has received the necessary training in how to work with volunteers, the next step is to reinforce the process by monitoring and evaluating them on whether they are carrying out this job function appropriately. The best way to do this is for the middle manager to set aside time on a regular basis to pay attention to the subject. For example:

- Ask questions about what volunteers contributed to any activity. Expect volunteers to be mentioned in written and oral reports.
- Discuss the progress of any new volunteer and how the employee is supporting the newcomer.
- Invite volunteers doing work relevant to what's on the agenda to participate in conferences or staff meetings as members of the team.
- Put the subject of volunteers, in general, on the agenda of staff meetings: How is it going? Any concerns? Anything we need to troubleshoot? How do we say thank you for extra effort?

The middle manager should evaluate and give feedback on how effectively staff members work with volunteers as a part of any annual or periodic performance review. This implies both that ineffective volunteer supervision will have negative consequences and that exceptional effort will be recognized and rewarded. If this recognition leads to a pay raise, promotion, or at least a strong compliment, the message will get through to everyone that *teamwork with volunteers matters in this organization*.

To be fair, enforcement is a two-way street. Volunteers should also be held to high standards and there should be consequences if productivity is low or work is not done properly. If some volunteers show poor attendance or resist instruction, they should be informed of the organization's dissatisfaction. This is as important as providing recognition for volunteers who do well. In fact, it makes annual recognition events more meaningful if everyone knows that mediocre volunteers were weeded out.

Employees will be more likely to accept evaluation of their ability to work successfully with volunteers if they know that the same assessment will be made of volunteers. Otherwise the organization is sending a mixed message: We want you to accept volunteers as equals, but we won't hold them to equal standards.

While career-advancing rewards are wonderful, the most important reinforcement for excelling in working with volunteers is praise. It's noticed when the manager says "great job!" to the employee who has clearly supported a volunteer, or when the accomplishments of volunteers and their staff supervisor are announced by name at staff meetings. The middle manager also should acknowledge volunteer/employee team accomplishments in reports made to upper management.

It may interest readers to know that I do not recommend treating volunteers as employees. Instead, I advocate treating employees the way we ought to treat *volunteers*: more choice, greater flexibility of schedule, freedom to criticize, and many thank-yous.

## THINGS TO THINK ABOUT AS YOU READ

Because one of the major roles for middle managers is ensuring that their staff are knowledgeable in how to lead volunteers, the following Featured Reading discusses some special considerations in supervising volunteers – things that require some extra emphasis or attention beyond what a supervisor would do for paid staff. Keep in mind the questions below while reading:

- How do these considerations compare or contrast with the approach to supervising paid staff?
- Do you know whether the frontline supervisors of volunteers, in fact, are acting on these considerations with the volunteers they supervise? To what effect?
- How can middle managers train or coach staff to become more effective in working with volunteers?
- How might middle managers take a more active role in encouraging and aiding teamwork between paid and volunteer staff?
- What do you suppose other middle managers are thinking as they read this Guide? If you communicate with each other as a network, how could you exchange ideas about supporting staff who supervise volunteers? What do you need to learn before you can help your staff? How and where might you learn it?

## Featured Reading

### ***Supervising or Partnering with Volunteers***

Excerpted from Chapter 6, "Strategies to Create Teamwork," in *From the Top Down: The Executive Role in Successful Volunteer Involvement*, 3rd edition by Susan J. Ellis (Energize, Inc., 2010).

Most paid staff do not have to learn all the techniques of how to develop and run a volunteer program. That is the responsibility of the director of volunteer involvement. But to accomplish specific jobs, the staff should feel comfortable in supervising and collaborating with volunteers as coworkers. All the principles of good supervision of employees operate with volunteers, too. However, there are some special considerations in supervising volunteers. These include the following:

- Volunteers need a positive working atmosphere. Because volunteers come and go during the course of a day or week, they encounter the work environment of a particular period. If the work-site tone is harried and hassled, it will affect volunteers' approach to their work, too. If some volunteers are on duty at lunchtime and therefore always see the staff on break, they will sense a different atmosphere than those who are scheduled at peak client visitation time. Enthusiasm and energy are infectious and really help volunteers to feel motivated. (Creating a good atmosphere for volunteers is one of those elements of volunteer management that rub off beautifully on the paid staff. Everyone benefits from a positive tone in the working environment.)
- To maintain continuity and consistency among volunteers with very different schedules, well-functioning communication mechanisms are essential to keep everyone in the loop.
- Many volunteer assignments involve work to be done outside of the agency's offices. This type of fieldwork includes such independent responsibilities as home visits to clients, solicitation calls on potential donors, leadership of group activities (clubs, sports teams, trips), and, increasingly, online assignments. It is quite possible for a volunteer to serve the organization entirely separated from the work site of the supervisor or staff liaison. This physical separation requires special consideration for defining lines of communication and accountability.
- Volunteers need accessibility to a supervisor or someone designated to answer questions. If an employee has a question and discovers her/his supervisor has gone out to a meeting, the question can wait until the next day. But a volunteer may only be in once a week. In that circumstance, having no one who can move the work forward can amount to a waste of a workday. It is not sufficient to have another staff member hand the volunteer a pile of work to do (though this is light-years ahead of having the volunteer arrive only to discover no one remembered s/he was coming in and no work was left at all!). Concern must be shown for supporting the volunteer's accomplishment of the task.
- Volunteers may get orientation and training but not need the information taught for many weeks or months later. Therefore, the supervisor needs to monitor if the volunteer is feeling competent and has the tools and resources necessary to do the best work. Betty Stallings often shares her favorite suggestion in her workshop presentations, which is the question that one of her daughters was asked midway through a volunteer experience: "Is there anything you have experienced in your volunteer assignment that we have not adequately prepared you for?"
- The volunteer's commitment of time should be respected. If there is no work to be done in the person's assignment area on a particular day, then the volunteer should, in all courtesy, be contacted and told of the problem. S/he can be given the option of revising her/his schedule for the week or of coming in anyway to do some other task. But it should not be assumed that all volunteers will do *anything* just to help out.

As alluded to previously, nothing is more undercutting of the volunteer's commitment than to arrive on site and discover that no work has been prepared—in fact, to realize that the paid

### Featured Reading

staff have forgotten the volunteer was even due in. Watching the employee rush around to “pull something together” for the volunteer to do is hardly conducive to feeling really needed.

- There is something in the volunteer world that I have always called “instant accountability.” This refers to the reality that, in the supervision of employees, there is a margin for error that does not exist with the supervision of volunteers. If a supervisor is moody, uncommunicative, nasty, or leaves no work to be done in his/her absence, the salaried worker will not like it but will tolerate it—or perhaps will “wait out” the mood until a better day. But the volunteer who is treated discourteously or is left with nothing to do is likely never to return to the organization again. This is not to imply that volunteers are thin-skinned. But if one gives his/her time to a facility and then is treated poorly, why should s/he return? It is a form of masochism or martyrdom to wish to repeat a bad experience under those circumstances.

It might be a measure of a supervisor’s skill to realize that every time a volunteer *returns* to an agency, it is a compliment to what occurred on the previous visit.

- Volunteers have freedom of choice beyond what employees are usually given. Employees must complete a wide variety of mandated tasks, even some that are tedious or somewhat unpleasant. A volunteer is free to say no to an assignment, without jeopardizing his/her right to remain a volunteer. This does not mean that a volunteer can randomly select which parts of a task to do and which to ignore. But it does mean that the person can, within reason, select a particular assignment on which to concentrate time and effort.
- There is a degree of “socializing” that is part of volunteering (paid staff do this naturally throughout the workweek without noticing). This can get out of hand, at which point it becomes a reasonable complaint of the employees. But, within bounds, it is fair for a volunteer to want to have some personal interaction during her/his scheduled work time. As long as this does not interfere with productivity, the supervisor might show an interest in the volunteer’s activities since last seeing him/her.
- Ongoing recognition, especially in the form of saying thank you, is important to supervising volunteers. In some ways, this amounts to an “exit line” in which a person is acknowledged for his/her efforts that day and is encouraged to return. But the thank-you has to be sincere. Remember that volunteers do not always see the way their work fits into the larger picture. By next week, the project handled this week may seem forgotten—unless the supervisor notes how the volunteer’s effort enabled the entire workload to be completed. (Again, it would be nice to say thank you more often to *employees*, too.)

Two important concepts to keep in mind when supervising volunteers are *courtesy* and *self-fulfilling prophecy*. So many interpersonal relationships can be handled smoothly with politeness and friendliness. This is important for any human interaction, but with volunteers the need to be courteous is even more vital. Similarly, when one expects the best, one often gets the best. If one has a low level of expectation about volunteers, volunteers will act accordingly—largely because they will end up being poorly recruited, trained, and supervised.

### Volunteers as Trainees

Employees often want to know if they may give critical feedback to a volunteer. The answer is of course. In fact, it is a form of compliment to give a person suggestions for improving work done; it implies that the supervisor has confidence that the volunteer has the capability and will to do a better job. And then the volunteer knows the work is important enough to be reviewed and done to the best of everyone’s ability. Empty thank-yous without enthusiasm leave volunteers with the uncomfortable suspicion that their work will be tossed out after they leave. It is better to deal directly with improving a volunteer’s work. After all, when people give their time freely, it is in the hope that their effort will produce results—not to waste their time doing something wrong or ineffectively.

### Featured Reading

One suggestion is to require every new volunteer, regardless of status or background, to be a “trainee” for the first month or so of work. You might even distribute colorful “Hi, I’m new here” buttons to cheerfully set the tone. All newcomers understand that they are in training, if only to become oriented to the organization. For the paid staff, the volunteer trainee period gives permission to correct early mistakes and give instructions. It is also a grace or probation period during which either the volunteer or the supervisor might recognize the placement is not working. Conversely, emerging from the training period successfully is immediate positive feedback.

This is also a bit different for frontline volunteers and those who provide expert consulting. Pro bono volunteers are, by definition, already highly skilled in their professions and so the organization will not have to do any training, per se. But even this group of volunteers needs *orientation* to the organization and some time to be integrated into the work.

### Collaboration with Volunteers

Again, not all volunteers work *under the supervision of* salaried staff. There are many assignments that utilize volunteers as independent specialists, consultants, or project leaders. These assignments imply partnership between volunteers and employees, on an equal footing. In fact, in some cases, the volunteer’s position (and expertise) may place him/her *above* the salaried staff member in responsibility).

The principles of good volunteer supervision create effective teamwork, too. Clear and written work agreements, respect for the volunteer’s time and contributions, and a willingness to be honest about the value of the work produced encourage successful collaboration.

One special need in these types of assignments is clarification of how the volunteer will keep the organization informed about her/his activities. Specify a *two-way* reporting process and timetable.

### Liaison Supervision by the Director of Volunteer Involvement

The director of volunteer involvement maintains an ongoing relationship with volunteers placed throughout the organization and monitors the progress of volunteer assignments. The immediate staff supervisor is responsible for day-to-day supervision on the front line, specific to the work being done. Should any problem arise, that supervisor is the first line of communication and accountability. However, the director of volunteer involvement can be helpful to both the employee and the volunteer by being a third party to differences of opinion.

If the volunteer wishes to change assignments, it would be up to the director of volunteer involvement to weigh the request and act upon it. Similarly, if the staff member wishes the volunteer transferred or terminated, the director of volunteer involvement must be involved. Ideally, the interrelationship is cooperative, open, and not unlike the way in which a personnel or human resources department operates.

## ASK THE TRAINER



### ***Discussion Board***

#### **Question & Answer Session with Trainer Susan J. Ellis**

##### **When?**

During the entire time this Guide is featured on your *Everyone Ready* Main Page, trainer Susan Ellis will be ready to answer any questions that you post on the Discussion Board, accessed via the left column of the *Everyone Ready* Main Page.

#### **Many *Everyone Ready* participants ask “But, how does all this relate to *my* situation?”**

The Discussion Board is your chance to ask specific questions related to your organization and to connect with others that may be having similar experiences.

#### **How Does the Discussion Board Work?**

1. Look for the trainer’s photo in the top center of the *Everyone Ready* Main page and select “Join the Discussion” underneath.
2. Indicate whether or not you would like to receive notifications about new questions and answers posted to the Discussion Board.
3. The Discussion Board window will appear.
4. Select a “thread” (a particular topic) to read and respond to, or start a new thread (if you have a completely different issue to discuss).
5. Follow the directions on the screen to post a response or question.
6. The trainer will respond via the Discussion Board within 48 hours. If you’ve signed up to receive notifications, you’ll get a direct e-mail with the answer, and your exchange will also be posted to the Discussion Board for the benefit of all participants (you will be given the option to keep the posting anonymous).

## DISCUSSION QUESTIONS FOR INDIVIDUAL OR TEAM USE

The following questions can be discussed with a group of learners in your organization or posed to yourself, if you’re considering this topic on your own.

1. What does anyone want from a supervisor? Have we been training or coaching each other to be skilled in supervising others, whether paid or volunteer? How can we improve our skills?
2. Are candidates for middle manager or department head positions informed that supervising volunteers is part of the job description? If not, when did they find out? Do middle managers perceive leading volunteers as part of their jobs or as add-ons to their work or possibly even a favor to the volunteer resources office?
3. How much time do middle managers spend talking about volunteers assigned to their branch/department/unit? Could such discussions be formalized so that we become more

conscious of whether the right volunteers are in the right place, doing the right things, in the right ways?

4. What feedback systems are in place that encourage volunteers and their supervisors to talk together and allow information to flow between frontline teams and middle management?
5. How much and what kinds of support about working with volunteers are middle managers giving to those who report to them? Do they ever send mixed messages that imply volunteers are important, but let's not spend too much time on them?
6. In this Guide, Susan says: "I do not recommend treating volunteers as employees. Instead, I advocate treating employees the way we ought to treat volunteers: more choice, greater flexibility of schedule, freedom to criticize, and many thank-yous."

Do we agree? If so, how might we try to implement this change of perspective?

## TRY-THIS EXERCISES

These activities are designed to allow middle managers to test the concepts of this Guide. If you are not a middle manager yourself, perhaps you can suggest these ideas to the people to whom you report.

1. Tell everyone who reports to you that, at your next supervisory meeting, you will want to discuss the volunteers they supervise. When you meet, ask each staff member to identify:
  - What each volunteer does. (If it's unclear, suggest ways to define the work more effectively.)
  - How the staff member monitors or coaches each volunteer. (If it's very informal, talk about whether it would be better to do something more consistent.)
2. Make a point of praising something a staff member is doing when supervising volunteers. Tell him or her directly, and then do something more public so that the rest of the staff sees the recognition.
3. Invite selected volunteers supervised by your staff to an informal coffee break with you. Ask them to share their perspective on what they want in the way of supervision, training, information, or other resources. See if those who are new answer differently from those who are veterans.



## RESOURCES ON THIS SUBJECT

### ***Volunteer Management Knowledge 101***

Middle managers may or may not be familiar with the wealth of resources available on the general subject of volunteer management. If this Guide has interested you in learning more about any aspect of working with volunteers, there are several places to start (and don't forget to talk to your organization's volunteer resources staff at the local or national level):

#### ***e-Volunteerism: The Electronic Journal of the Volunteer Community***

Everyone Ready members have free access to this international journal as a benefit of membership. Here you will find not only the most current quarterly issue but also over 360 articles in the searchable Archives on a wide range of volunteer management topics. ***Go to your Everyone Ready Main Page*** and click on the *e-Volunteerism* link to be recognized as a subscriber. See the *e-Volunteerism* articles list below for specific articles related to the topic of this Guide.

#### ***The Energize, Inc. Web Site (<http://www.energizeinc.com>)***

The largest site in the world focused exclusively on information for leaders of volunteer efforts. The Volunteer Management Resource Library (<http://www.energizeinc.com/art.html>) section of the site includes articles and links to other online resources (most free), organized by topic. Through this site you will discover hundreds of immediately-helpful resources.

### ***Books Available from the Energize Online Bookstore***

Can be purchased using your Everyone Ready discount code in the Energize, Inc. online bookstore at [www.energizeinc.com/bookstore](http://www.energizeinc.com/bookstore). Your **discount code** can be found on your Everyone Ready Main Page.

Ellis, Susan J. *From the Top Down: The Executive Role in Successful Volunteer Involvement*, 3rd. Ed. Energize, 2010. <http://www.energizeinc.com/store/1-102-E-3>

Lee, Jarene Frances with Julia M. Catagnus. *What We Learned (the Hard Way) about Supervising Volunteers: An Action Guide to Making Your Job Easier*. Energize, 1998. <http://www.energizeinc.com/store/1-175-E-1>

McCurley, Steve and Rick Lynch. *Keeping Volunteers: A Guide to Retention*. Fat Cat Publications, 2005. <http://www.energizeinc.com/store/5-218-E-1>

McCurley, Steve and Sue Vineyard. *Handling Problem Volunteers: Real Solutions*. Heritage Arts Publishing, 1998. <http://www.energizeinc.com/store/1-171-E-1>

Stallings, Betty B. "Supervising Volunteers." Training Module 5 in *Training Busy Staff to Succeed with Volunteers: The 55-Minute Staff Training Series*: Energize, Inc., 2007. <http://www.energizeinc.com/store/4-225-E-1>



### ***e-Volunteerism Articles***

Everyone Ready members have full access to this international journal as a benefit of membership.

***Go to your Everyone Ready Main Page, click on the e-Volunteerism link to be recognized as a subscriber, and then search for the article in the Archives.***

Ellis, Susan J. and Steve McCurley. "How Many Supervisors Does It Take to Screw in a Volunteer?" Points of View essay, Volume IV, Issue 1, October 2003.

Lawson, Suzanne. "Working with Senior Leadership." Volume VI, Issue 4, July 2006.

Lynch, Rick. "Volunteer Retention and Feelings of Connection." Volume I, Issue 1, October 2000.

Quirk, Mary, Colleen Fritsch, Lee George and Terry Straub. "Boomers and Beyond: 12 Best Practices Vital to Volunteer Resources in the Future." Volume X, Issue 4, July 2010.

Stallings, Betty. "OUR Volunteer Program: The Management TEAM Approach to Enhancing Volunteer Programs." Volume V, Issue 4, July 2005.

### ***Web Sites***

**"Supervision" in the Resource Library of Energize Web site**

<http://energizeinc.com/art/subj/super.html>

**"Supervision Tips" in Collective Wisdom area of Energize Web site**

<http://energizeinc.com/supervising.html>

**"Executive Director, Role of" in the Resource Library of Energize Web site**

<http://energizeinc.com/art/subj/exec.html>

### **Becoming a Better Supervisor: A Resource Guide for Community Service Supervisors**

Developed by the National Service Resource Center to help frontline supervisors in all kinds of community service programs. The guide was drawn from three major sources of information: a comprehensive needs assessment; views of supervisors who participated in Supervisory Skills Workshops; and literature of specialists in the fields of supervision, management, and community participation. <http://nationalserviceresources.org/becoming-supervisor>

### **CASA Volunteer Management Materials**

Excellent site from National Court Appointed Special Advocates (CASA) Association for universal information on many volunteer management topics - scroll down page for the lengthy section on "Volunteer Supervision," and stop for other topics along the way. <http://www.casanet.org/program-management/volunteer-manage/index.htm>

### **Volunteering England's Best Practice Section on Support and Supervision**

A variety of practical articles and sample materials.

<http://www.volunteering.org.uk/Resources/goodpracticebank/Core+Themes/supportandsupervision/index.htm?knownurl=http%3a%2f%2fwww.volunteering.org.uk%2fResources%2fgoodpracticebank%2fCore%2bThemes%2fsupportandsupervision%2f>

## POST-READING ASSESSMENT

Now that you have completed this Guide, answer the questions below again to see if your reflections have changed and if you want to move forward with ideas for greater support of those who supervise volunteers and report to you.

1. How informed do you consider yourself to be about best practices in working with volunteers?  
☐ Very    ☐ Moderately    ☐ A little    ☐ Not at all

2. My knowledge comes from:

- ☐ First-hand experience in working with volunteers, but no formal training  
☐ In-service training about managing volunteers  
☐ Reading volunteer management literature  
☐ "Life experience," including volunteering I personally do/have done elsewhere

3. Are you clear about why your organization involves volunteers, what the goals and objectives are for that involvement, and what the expectations are of all staff for making volunteer engagement successful?

- ☐ Yes    ☐ Somewhat    ☐ No

How did you learn this? (Check as many as apply.)

- ☐ Executives have developed clear expectations in writing.  
☐ These issues are discussed in leadership and planning meetings.  
☐ I watched and learned from others.  
☐ It seems intuitive.

4. Do you understand how your specific department can benefit from involving volunteers?

- ☐ Yes, when planning objectives for the department I consider what roles volunteers can play in meeting those objectives and encourage my staff to implement such roles.  
☐ Somewhat, though I generally rely on my staff to propose roles volunteers can fill.  
☐ No, I try to find room for volunteers because I know my organization expects all units to "use" them.

5. Do you have a volunteer assigned directly to *you* to help with your work in any way?  
If not, why not?

6. Which of the following reflect your opinions of volunteers in your branch/department/unit?  
(check as many as apply)

Volunteers...

- ☐ Are generally pleasant but unprofessional  
☐ Take a lot of our time  
☐ Are worth the effort

- ☐ Drain time from our priority work
  - ☐ Are an integral part of our work team
  - ☐ Come to us with many useful skills and talents
  - ☐ Generally need to be trained before they can be helpful
  - ☐ Raise issues of confidentiality and risk management
  - ☐ Are more highly educated or experienced than our paid staff
  - ☐ Contribute skills that expand the abilities of the staff to help our clients
  - ☐ Matter to the recipients of service
  - ☐ Give us new perspectives and feedback on our work
  - ☐ Want input on things they know very little about
  - ☐ Boost our morale and enthusiasm
  - ☐ Aren't what they used to be
  - ☐ Need more physical space and supplies than we have
  - ☐ Make us a better unit
  - ☐ Divert us from accomplishing goals
  - ☐ Can be positive or negative depending on the volunteer, and we can't count on the volunteer resources office to recruit people with consistent quality
7. Do you know which staff members who you supervise have been trained in how to work with volunteers? Is the responsibility to supervise volunteers in their job descriptions?
8. How often do you speak with staff about their work in supporting volunteers? Is this a regular topic in your supervision meetings? Is it a factor in your annual performance reviews?
9. What recognition, rewards, or possible negative feedback might you be giving to staff about spending time with volunteers?
10. Do you include volunteers in staff meetings or ever meet with them as individuals yourself?

## ABOUT THE AUTHOR



### Susan J. Ellis

Susan J. Ellis is president of Energize, Inc., a training, consulting, and publishing firm that specializes in volunteerism. She founded the Philadelphia-based company in 1977 and since that time has assisted clients throughout North America, Europe, Asia, Israel, Latin America and Australasia to create or strengthen their volunteer corps.

Susan is the creator and dean of *Everyone Ready* (<http://www.energizeinc.com/everyoneready/>), an online volunteer management staff development plan, designed for national agencies to ensure effective volunteer leadership at every level of the organization. After three successful years, the program has just been opened to individuals to enroll for personal professional development.

Susan is also the author or co-author of twelve books, including *From the Top Down: The Executive Role in Successful Volunteer Involvement* and *The Volunteer Recruitment Book*, several of which have been translated into Japanese, Taiwanese, French, and Italian. All her books can be found in the Energize Online Bookstore. From 1981 to 1987 she was editor-in-chief of *The Journal of Volunteer Administration*. She has written more than 90 articles on volunteer management for dozens of publications and writes the national bi-monthly column, "On Volunteers," for *The NonProfit Times*.

In 2000, she and Steve McCurley launched the field's first online journal, *e-Volunteerism: The Electronic Journal of the Volunteer Community*, <http://www.e-volunteerism.com> for which she serves as editor.

She was the recipient of the Association for Volunteer Administration's 1989 Harriet Naylor Distinguished Member Service Award. Susan is an active volunteer in a variety of volunteerism associations and several Philadelphia-based community groups.

### Books by Susan in the Energize Online Bookstore:

*By the People: A History of Americans as Volunteers, New Century Edition*

*Children as Volunteers*

*Focus on Volunteering KOPYKIT™*

*From the Top Down: The Executive Role in Successful Volunteer Involvement, Third Edition*

*The (Help!) I-Don't-Have-Enough-Time Guide to Volunteer Management*

*Leading the Way to Successful Volunteer Involvement: Practical Tools for Busy Executives*

*Proof Positive: Developing Significant Volunteer Recordkeeping Systems*

*The Volunteer Recruitment (and Membership Development) Book, Third Edition*

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**Everyone Ready** is a staff development training plan produced by Energize, Inc. to sharpen volunteer management skills. The plan includes online training materials provided throughout the year on basic and advanced volunteer management subjects. There are individual and organizational memberships, the latter designed to allow organizations to share the content with volunteer and paid staff at every level and geographic location across their networks.

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### Featured Reading

Excerpted from Chapter 6, "Strategies to Create Teamwork," in *From the Top Down: The Executive Role in Successful Volunteer Involvement*, 3rd edition by Susan J. Ellis (Energize, Inc., 2010).

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