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# 04 REVIEW

Reviewing the work of volunteers helps raise both the quality and level of service from the volunteers and for the organisation as a whole.

## a. Performance review, appraisal and exit

### PERFORMANCE REVIEW AND APPRAISAL

Plan and conduct performance reviews and appraisals with your volunteers. Regular performance feedback to your volunteers helps them stay on course to achieve and excel.

Reviews and appraisals must be transparent, and your volunteers must be able to see value in them too.



### SAMPLE REVIEW AND APPRAISAL PROCEDURE

- 1 Make known to your volunteers during their orientation that reviews and appraisals are part of the job. As you go through their job descriptions with them, highlight what you will be looking for during the reviews and appraisals. It is also good at this point to set a timeline on the reviews and appraisals.
- 2 Prepare for the reviews or appraisals – refer to the timeline and set up individual appointments with your volunteers. Have both your volunteer and yourself or the immediate supervisor complete a self assessment and make other preparations for the face-to-face discussion, as with any staff appraisal.
- 3 At the review or appraisal, set up the venue, welcome your volunteer, put him/her at ease with small talk, state the objective, compare assessments and discuss differences to arrive at an agreement on how to move ahead. Talk about training and other development opportunities. Close by thanking the volunteer for contributions made.
- 4 After the review or appraisal, keep the notes or forms in your volunteer's personal files. Note the follow-up action (monitor performance, sign volunteer up for training courses, etc.) for each volunteer and write in your diary the next set of review and appraisal dates.

You may need to have more sessions with a volunteer who is giving you problems (misconduct, unsatisfactory performance, creating conflict with other volunteers or paid staff, etc.).

Keep such sessions objective and supplement your points with concrete evidence. It would be necessary for you to document these sessions and use these reports to justify terminating the volunteer at a later stage if things get out of hand. Remember that how you recruit volunteers is going to influence the number of difficult volunteers you end up having on your hands.



# SAMPLE VOLUNTEER PERFORMANCE APPRAISAL FORM

Name of Volunteer: \_\_\_\_\_

Volunteer Position: \_\_\_\_\_ Time Period Under Review: \_\_\_\_\_

Ratings	
4=Excellent	Clearly exceeds job requirements
3=Satisfactory	Meets all requirements
2=Average	Meets most requirements, room for improvement
1=Unsatisfactory	Does not meet most job requirements

		Ratings	Supervisor's Comments
<b>A</b>	<b>GENERAL</b>		
	Attendance		
	Punctuality		
	Personal Appearance		
<b>B</b>	<b>WORKING WITH OTHERS</b>		
	Maintains effective working relationships with staff		
	Maintains effective working relationships with other volunteers		
	Relationship with clients/charges		
<b>C</b>	<b>TRAINING</b>		
	1. Positive about training		
	2. Attends training sessions consistently		
<b>D</b>	<b>ATTITUDES</b>		
	1. Positive Attitude		
	2. Accepts supervision and constructive criticism		
	3. Responsible		
<b>E</b>	<b>LEADERSHIP</b>		
	1. Shows initiative		
	2. Problem solving skills		
	3. Ability to inspire and motivate others		
<b>Total Score:</b>			

Additional comments: \_\_\_\_\_  
 \_\_\_\_\_

Follow up actions / recommendations: \_\_\_\_\_  
 \_\_\_\_\_

Appraised by:  
 \_\_\_\_\_  

Name of Appraiser
Signature and Date

*Supervising Volunteers by Susan J. Ellis, 1999*

You may need to include other items relating to the work the volunteer is involved in for review. Look at the job description which you have done earlier to help you.

## EXIT

Eventually, all volunteers will leave your organisation. While some leave because they are moving, changing their jobs or starting a family, some may leave because they are feeling tired, burnt out and have lost interest in their volunteer work or even the affiliation they feel with your organisation. Find out the reasons and factors that contribute to volunteers leaving. You can only fix the problems when you know what they are.

There may be times when, no matter how hard you try, volunteers leave for reasons of their own that have nothing to do with you. Their volunteer career path could take them into a different direction from what you can offer. In which case, send them along with your good wishes, even make the necessary referrals for them and be thankful that you had them for a season.

## SAMPLE EXIT SURVEY FOR EXITING VOLUNTEERS

Please help us give future volunteers a positive experience volunteering with our organisation by giving us feedback about your own volunteer experience with us. Your feedback is important to us and will go a long way in our future volunteer programmes. Thank you.

Name: \_\_\_\_\_ Date: \_\_\_\_\_ Unit/Group: \_\_\_\_\_

What do you like about your volunteer experience with us?

- Teamwork     Training / Achievement     Service to the community     Get to know the community  
 Make friends     Self-satisfaction     Helping people    Others: \_\_\_\_\_

What don't you like about your volunteer experience with us?

- Internal conflicts     Lack of support     Training     Lack of recognition  
 Time commitment / hours     Financial strain     Stress level    Others: \_\_\_\_\_

Why are you leaving the organisation?

- Moving     Taking on new volunteer commitment     Health     Dissatisfied  
 Change of job / job functions     Family and/or personal commitment     Lost interest    Others: \_\_\_\_\_

Were you given appropriate equipment and facilities to do your job well?     Yes     No

Were you given appropriate training to do your job well?     Yes     No

Did being a volunteer in this organisation help you in your everyday life or at work?     Yes     No

Do you think your volunteer work made a positive difference to the community?     Yes     No

Would you recommend others to volunteer with this organisation?     Yes     No

Would you return to volunteer with us?     Yes     No

If Yes, when might that be? If No, why not?

\_\_\_\_\_

***“The feedback you get from volunteers who exit should indicate where the problem areas are. You can then work towards solving these problems.”***

## b. Volunteer programme assessment

Apply the PDCA cycle (Plan, Do Check, Act) for continuous improvement to achieve desired results. Each event and activity provides important knowledge. This includes information about:

- Who is willing to support the programme
- How to effectively run a particular event/activity
- How best to explain key information to new volunteers, etc.

An organisation that forgets these lessons will keep wasting time, frustrate staff by reinventing the wheel and repeating the same mistakes. An organisation that can learn and remember lessons, question approaches, develop more effective strategies and continue to build upon this knowledge is a learning organisation. Such an organisation makes much better use of the time of its staff and volunteers, achieves more and reduces frustration for everyone.

You have gone through the planning and implementation stage of your volunteer programmes. Relevant information is available through documentation. Assessment is the review of activities against certain goals, standards or values. It looks more deeply to try to answer the question 'why?' and to determine whether the programme should be changed.

### SAMPLE POINTERS FOR EVALUATION

1

Does the organisation regularly review and evaluate the effectiveness and outcomes of its volunteer programme? What review and evaluation processes are used?

2

Does the organisation use specific criteria to evaluate its volunteer programme?  
Does the criteria include:

- Level of volunteer participation
- Range of activities
- Retention of volunteers
- Absenteeism and paid staff substitution
- Work satisfaction levels of volunteers
- Number of complaints or positive feedback from customer services
- Number of volunteer grievances

3

Are the results of evaluations and reviews documented?

4

Does the organisation provide opportunities for volunteers to be involved in the evaluation and review process? What mechanisms does the organisation use?

5

To what extent do the results of the evaluations and reviews influence or change the way volunteer services are delivered and/or managed?

With the objectives of your assessment in mind, how close are you to a model volunteer programme?

# SAMPLE VOLUNTEER PROGRAMME EVALUATION

Rate your volunteer programme against each of the components of an Ideal Volunteer Programme  
(A = Excellent, B = Good, C = Poor)

	Rating	Suggestions for Improvement
Strong, positive motivations to have volunteer programme		
Leadership support of volunteer programme <ul style="list-style-type: none"> <li>What are the signs of administrative support (or lack of support) in your organisation?</li> </ul>		
Volunteer coordinator <ul style="list-style-type: none"> <li>Part / Full time</li> <li>Designated / Recruited</li> <li>Paid / Unpaid</li> </ul>		
Staff trained to work with volunteers		
Linked volunteer programme goals to organisational goals		
Written policies and procedures for volunteer programme		
Written job descriptions and/or contracts with volunteers		
Volunteer record keeping system in place		
Orientation sessions/manual		
Volunteers involved in planning and evaluating volunteer programme		
Staff-volunteer relations: how do the staff feel about engaging volunteers?		
Client-volunteer relations		
Time to supervise volunteers		
Volunteer programme review <ul style="list-style-type: none"> <li>What were you able to accomplish organisationally this year due to the support of the volunteers?</li> </ul>		
Formal and informal volunteer recognition		
Volunteer exit review <ul style="list-style-type: none"> <li>What was the volunteer turnover this past year?</li> <li>Do you conduct exit interviews with your volunteers?</li> <li>What useful information did you get from these interviews?</li> </ul>		
Diversity, creative engagement of volunteers <ul style="list-style-type: none"> <li>Is your organisation engaging volunteers such as pre-teens, seniors?</li> </ul>		

Techniques commonly used in assessment include surveys, focus groups, observation, discussions with participants and historical comparisons.

The assessment focus should not just be on programme outputs but on the outcomes as well. For example, when a theatre group gives a performance to children, programme output would be the number of people who attended the performance and the outcome could be greater appreciation of the arts by the audience. Outputs are usually more easily measured than outcomes.

When writing an assessment report it is useful to have a consistent reporting style with well-defined information that is authored and dated for future reference.

Finally, when looking at any programme it is important to highlight the successes as well as the failures. While it is important to understand what can be improved, it is also important for staff and volunteers to receive positive feedback.

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