

Slide 1: Welcome to module six volunteer supervision. Volunteers bring so much to our organizations. They spark ideas, provide insight, lighten the load, and make a difference in the lives of others and our community every day. But to effectively engage with volunteers, we must provide excellent supervision.

Slide 2: The objectives of this module are to provide an overview of supervision, including training, monitoring, evaluating, and recognizing volunteers, and to demonstrate the significance of volunteer supervision and the volunteer management profession.

Slide 3: This slide shows you the volunteer development cycle. Starting with the needs assessment at the top and ending with the reassignment of a volunteer. As you can see from this illustration, specific training, monitoring, recognition, and evaluation occur after the volunteer has been hired and given the general orientation to your organization. I believe that these steps are critical to effective volunteer engagement and volunteer supervision.

Slide 4: Supervision is the formal process that involves setting tasks and targets for achieving objectives and measuring success. There must be a designated supervisor, whether it's a lead volunteer or a staff member, assigned to each role. The level of supervision depends on the following, the nature of the volunteer role, is it short-term or long-term, the risk level inherent in the role to self and others, and the skill and/or knowledge level required to perform the role well. For example, if you have a volunteer engaged in a short-term role, such as a special event greeter, who is doing tasks that are low risk and require low skill level, they will need less training, monitoring, evaluating, and recognition than an volunteer who has made a long-term commitment to your organization and is engaged in a role that has a higher risk and/or skill level. An example of a long-term high risk skill role would be a volunteer who takes meals to seniors or serves on your board of directors.

Slide 5: Training provides volunteers with the necessary skills and knowledge to perform their role safely and effectively. Different volunteer roles require different amounts and types of training. Sometimes volunteers are recruited because they already have a specific qualification and other times volunteers will be completely new to the role. When planning training for a specific role, ask yourself what information and skillsets are needed to perform the role with care? Are your volunteers digitally competent and open to online training? And finally, how can you customize the training to meet the needs of each volunteer? Be sure to consider learning styles and accessible language when creating training materials.

Slide 6: At the volunteer training, you will have to explain the purpose of the role and its impact. This is important because volunteers want to know how they are making a difference. Review expectations and responsibilities as outlined in the job description, show the tools and procedures that volunteers will encounter, review specific tasks, skills, and logistics. To find the limits or boundaries of the role and explain the potential risks and implications if boundaries are breached. Communicating this information from the onset helps reduce confusion later on. And finally share information on your evaluation processes.

Slide 7: There are three training formats that work very well with volunteers. Formal training, on the job training and mentorship. Training can be presented through a variety of methods, including lecture, instruction, manuals, group or panel discussions, demonstrations, videos, and more. Training can be presented in person, online, or through a blend of the two. On the job training allows you to demonstrate the skills to be learned or improved. Make sure you allow the volunteer to perform tasks while being coached by an expert. Answer questions and provide feedback on performance. And finally, mentorship, formal mentorship relationships are created between new and more experienced volunteers. They provide a personal connection to the organization and it's an excellent opportunity to recognize the skills of experienced volunteers- enabling them to model desired behaviors for new volunteers. After any training, have the volunteers fill out an evaluation and use their feedback to improve your training.

Slide 8: Training volunteers may seem obvious, and it is generally dictated by the job description, but there are other reasons to invest in excellent volunteer training. Training shows that your organization has done its due diligence. It ensures the quality of the services your organization provides. It helps to assess whether the volunteer is the right fit for the role. It also strengthens the volunteer's sense of belonging and provides volunteers with an opportunity for growth and development. Training allows the organization to provide updates, refreshers, and retraining on an ongoing basis.

Slide 9: Now, let's talk about monitoring. Monitoring your volunteers refers to the level of support, feedback, and direction required for the role. And ensures that the volunteers are provided with regular opportunities to give and receive feedback.

Slide 10: It is important to monitor and provide feedback. Monitoring tools include onsite availability, occasional check-ins, volunteer logs, online reporting systems, communication by phone and email, feedback from clients served, and feedback from staff and volunteers. It is important to give volunteers regular feedback especially at the beginning of their placement. Effective feedback is descriptive and refers to a specific situation or action. It's given immediately and concerns a behavior that can be changed.

Slide 11: It is recommended that you introduce probationary and annual satisfaction surveys along with exit interviews to gather feedback from your volunteers. Asking for feedback helps you assess how well your volunteer management practices are running, how happy your volunteers are, and what you can do to make their experience better. Asking for regular feedback and acting on it helps volunteers understand that they are valuable partners in your mission success. Simple questions include, do you feel that you were provided with adequate training to be successful in your role? Do you have appropriate access to resources and personnel during your experience? And do you know exactly what tasks you are responsible for?

Slide 12: Evaluation is the opportunity to periodically assess how well volunteers are performing assigned work and to applaud valuable effort and to improve or correct problems.

Slide 13: It may seem slightly counter-intuitive to evaluate volunteers because they are donating their time to your organization. But evaluation is important to ensure a standard of service is maintained, to improve volunteer performance when necessary, to understand what the organization can do to better support volunteers, and to measure the impact by collecting and reviewing quantitative and qualitative data about volunteer involvement.

Slide 14: There are two types of evaluations, structured and unstructured. Unstructured evaluations are informal and a wonderful opportunity to coach and mentor volunteers. They are best suited for short term roles, like a special event or roles that have a low skill risk level, such as a volunteer who organizes your bookshelves. These informal evaluations occurred during the volunteer shift and are very conversational. Since corrective and constructive feedback is often more effective when it is given in the moment, informal evaluations allow you to provide feedback that is specific and timely. Structured evaluations are more formal and are best for long-term, high risk level roles such as a suicide hotline. These evaluations are scheduled ahead of time, perhaps after a set probationary period, or on an annual basis as a check-in. For this type of evaluation, it is best to use standard forms that are similar to the appraisal forms you use for staff. You may also want to give your volunteers a self-assessment form to discuss at the same time. Be sure to ask open-ended questions and invite feedback. Formal evaluations may also be scheduled if you need to correct a behavior. To resolve an issue, corrective actions are most effective when it is addressed as early as possible and all relevant documentation related to the volunteer performance is recorded and kept on file.

Slide 15: We cannot evaluate unless we know what our measurement of success is. A standard defines the minimal level of performance acceptable for a particular task. Some standards will be general. Others will be related to a specific position. By establishing standards upfront, we provide direction, clarify expectations, and minimize the chance of error. According to Rick Lynch in his book, volunteer management, lousy job descriptions produce really lousy evaluation sessions. It is impossible to conduct a good evaluation if you do not have an accurate job description for every volunteer. Without a good job description, volunteers will not know what they are asking from the volunteer and the volunteer will not know what is expected of them. You can also share your organizational standards in the agreement or code of conduct form and during your orientation and training sessions.

Slide 16: When doing an evaluation meeting, I recommend the rat method review, assess, and plan. Review the volunteer's accomplishments against the job description and performance standards, and recognize their contribution. Assess their performance and correct any new or ongoing problems. Plan for the future by setting objectives and goals. After the evaluation meeting, take action to resolve any issues that were identified and follow up on performance. Be sure to provide ongoing support and feedback. You also have to be willing to reassign or part ways when needed.

Slide 17: Recognition is acknowledging and celebrating volunteer achievements and their impact with your organization. Actively recognizing volunteers is one of the most important

components of volunteer engagement and retention. Volunteers today are looking to provide their time to organizations that offer them value in exchange for their commitment.

Slide 18: There are three pillars of volunteer recognition. Recognition is an ongoing and integral part of the volunteer management process. Recognition can be formal or informal and given on more than one occasion. And recognition should be meaningful to the person being thanked and given in a timely way.

Slide 19: Volunteer recognition is an ongoing process in the volunteer development cycle. For example, when you're doing a needs analysis, why not request volunteer input to help you develop new volunteer opportunities? When you're recruiting, share volunteer success stories in recruitment ads on social media. When you're interviewing and screening ask candidates how they would like to be thanked. During the placement process, make sure you match volunteers with appropriate roles. During training, you can offer a variety of training opportunities. And when you come to mentoring ask long-term volunteers to help mentor a new volunteer.

Slide 20: You can say that volunteer recognition is formal or informal, but often you do both. Formal recognition refers to honors and events that an organization plans ahead of time, usually on an annual basis, to show their appreciation to volunteers. Examples include giving pins and certificates for years of service, celebrating national volunteer week, submitting 3a award nominations, hosting a party, or giving tokens of appreciation. Informal recognition refers to the day-to-day interactions that express sincere gratitude for the work being done. Examples include saying thank you, involving volunteers in decisions that affect them, writing a reference letter, or sending a card on the volunteer's anniversary with your organization.

Slide 21: Whenever possible, try to make recognition meaningful to the volunteer. So, if the volunteer tells you during the interview, or on their application, that they want to make a contribution to their community, let the volunteer know the outcomes of their work. If a volunteer wants to network with others, host a party and let the volunteers bring a guest so they can meet new people. If a volunteer wants to improve job skills or opportunities, be sure to offer additional training or provide a reference letter after probationary period. And if a volunteer says they want to use their skills and expertise, promote volunteers to other roles that can take better advantage of their talents or ask them for their feedback.

Slide 22: Volunteer supervision is enhanced by effective volunteer training, monitoring, evaluation, and recognition. Your volunteers should always have something to work on, should know where to go with problems or concerns, and should feel like they're a priority in your organization. Supervision is a way to keep connected with your volunteers, provide them with structure, and support and ensure their satisfaction.