



Special Olympics

VOLUNTEER TRAINING SERIES

**PERFORMANCE
REVIEWS**

Facilitator's Guide



Special Olympics Volunteer Management Series

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- The Global Volunteer Resource Development Team
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Introduction:

Suggesting that a Special Olympics Program initiates performance reviews of volunteers is frequently met with resistance. You may hear, "We're getting too formal," "Volunteers will be scared off," "We don't have the time or skills to perform them," or "How could we ever initiate this with our current volunteers?"

Countering these reflections are a growing number of volunteer program leaders who see performance review as a reflection of the importance of volunteers in Special Olympics and the movement's commitment to providing the highest quality programs to our athletes. It is a mutual way to express appreciation, identify problems and needs, determine the volunteer's future involvement in Special Olympics, and hold the volunteer and the Program accountable for their commitment to one another.

Increasing numbers of volunteers are seeking to develop and enhance their skills through volunteer work and are welcoming opportunities to receive constructive feedback and evaluation of their work. Programs which are attempting to maximize volunteer participation view a mutual assessment as a time to consider the additional support they need to offer volunteers to ensure job success.

Initiating a volunteer performance review system should be gradual and sensitive to concerns and issues of existing staff and volunteers. Often, the development of a self-assessment tool is the first step toward having volunteers begin to take a critical look at their accomplishments.

Both parties, the Program and the volunteer, will have established guidelines by which to evaluate the success of this partnership if they have initially agreed to:

- (1) clear success measures for the volunteer job – including a written job description
- (2) Program provided support and resources to ensure volunteer success

Also keep in mind that without performance reviews, it is hard to hold staff and volunteers alike accountable. And unaccountability can lead to a Special Olympics Program that suffers.

The **primary purpose** of this module is to:



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⇒ introduce or enhance a Program's performance review of volunteers.

Learning Objectives:

Upon completion of this module, participants will be able to:

1. Define a volunteer performance review process that fits into the total supervision and support process of the Program.
2. Develop an understanding of the purposes, benefits and barriers of instituting or enhancing a performance review process.
3. Examine a suggested process and tools for performing the review.
4. Explore the potential outcomes of performance reviews.



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General Notes to Facilitator:

1. This workshop is in a suggested format. Feel free, however, to personalize it with your own stories about your experiences working with Special Olympics..
2. Be prepared to experience resistance on this topic. It is still controversial but more professional volunteer managers are discovering the positive impact that performance reviews have on the volunteers and the Special Olympics Program when they are performed effectively.
- 3.. This workshop deals with both attitudes towards evaluation and a process to apply it to the volunteer program. You will need to judge whether the entire workshop will be possible to deliver effectively in the allotted time frame. Suggestions for breaking it into several workshops are given on "Suggestions for expanded activities for workshops over 55 minutes" found at the end of this Guide.
- 4.. This workshop may generate ideas for improving the overall Special Olympics Program's performance review system. This may be frustrating to participants unless their concerns are heard. You may wish to avoid these distractions by making it very clear at the outset of the presentation that the discussion will be focused solely on the volunteer program.
5. Evaluation is a key component of risk management as it allows for ongoing assessment of whether a volunteer continues to perform in the best interest of the athletes, health, and safety.

WORKSHOP OUTLINE



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Slide #	Corresponding Facilitator Guide Pages	Section	Total Estimated Time: 60 minutes
G-1, 2, 3, 4	7, 8	Introduction Activity Introduction Learning Objectives Key Concepts	10 minutes
G- 5, 6, 7	8, 9	Concept 1 Definition of Volunteer Performance Review	8 minutes
G- 8, 9, 10	9-11	Concept 2 Benefits/Barriers	12 minutes
G- 11, 12, 13, 14	12, 13	Concept 3 Process of Performance Review	8 minutes
G- 15, 16, 17	13-15	Concept 4 Outcomes of Performance Reviews	15 minutes
G- 18, 19	16, 17	Optional Section Dismissal	
	17	Summary/Wrap-up/Evaluation	3 minutes

INTRODUCTION

- Show Slide #1

Opening Exercise:



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For two-minutes have participants share any words that come to mind when they hear/see the word: **evaluation**.

Anticipated reaction:

Generally, there will be an overwhelmingly negative reaction to the word (e.g., powerless, adversarial, boss, school, uncomfortable). Occasionally, more positive words will suggest growth, challenge, affirmation.

Presentation:

People frequently have had negative experiences with evaluation in their life; it is often viewed as one sided and frequently negative. Ask participants to open their minds to a new view of performance evaluation/review which is intended to be an affirming event, not one to be feared, ignored or avoided. Keep in mind that volunteers are used in every facet of Special Olympics. Feedback is good because it can foster the building of a stronger Program.

Because of the structure of our organization, volunteers spend more time working with volunteers on a day-to-day basis than many staff members. Many Special Olympics volunteers in key leadership roles should be evaluating other volunteers working with them, but have never had training in this area. Share the concepts presented in this module with those who will be performing the evaluations.

- **Show Slide #2: Learning Objectives**

Summarize objectives of this module and offer some introductory comments on performance reviews. Employ personal experiences and anecdotes if applicable.

* Emphasize that evaluation is based solely on the performance of agreed upon duties in the job description – morale judgments should not be made!

- **Show Slide # 3 & 4: Key Concepts of Performance Reviews**

This workshop is built on 4 Key Concepts. Indicate that during the workshop each concept will be examined more closely.

- **Show Slide #5: Key Concept 1**



KEY CONCEPT #1:

SUCCESSFUL PERFORMANCE REVIEWS PROVIDE FOR A PERIODIC OPPORTUNITY FOR COMMUNICATION BETWEEN A PERSON WHO ASSIGNS WORK AND THE PERSON WHO PERFORMS IT. EACH PARTY SHOULD DISCUSS WHAT THEY EXPECT FROM THEMSELVES AND EACH OTHER AND HOW WELL THOSE EXPECTATIONS ARE BEING MET.

Presentation:

Performance reviews should be non-threatening, constructive, supportive, flexible and empowering. They should aim to encourage the volunteer to stretch for high standards and determine where the Special Olympics Program can help the volunteer achieve his/her goals. Standards should be preset and understood before acting. This can be accomplished by having an accurate written job description available.

- **Show Slide #6 &7: Essential Elements for Success**

Essential elements for success:

1. As they enter the Program, volunteers should be apprised of the feedback system, including the system of performance review.
 - a. *Job descriptions should always be part of the system for key volunteers and day-of-event volunteers. Expectations should be presented in one or two bulleted points.*
 - b. *After an event or following project completion, a post-event evaluation should be performed to determine effectiveness.*
1. Mutuality is the key. Evaluations are a time for both the volunteer and the supervisor to share any concerns they have.
2. Performance review should be based on previously agreed upon standards, job description, tasks, deadlines, available resources, intervening circumstances, etc. It will only work if these factors are in place first. If there isn't agreement, it is acceptable to look for other volunteer positions for the individual.



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3. The performance review should have no surprises if ongoing supervision and conflict resolution have taken place. Regular reviews are performed during the course of the activity by the supervisor as well as the volunteer.
4. A job performance review can be as short as a check list or as long as a formal review. Depending on the size and culture of the Special Olympics Program, the process can be formal with special forms or done in a more informal workshop. Nevertheless, if the review is done too informally there is the potential that it will not be taken seriously.
5. Self-assessment may work best as the system is initiated and it is a good tool to use with everyone in a key leadership role. However, it is best to gradually include long-term volunteers who have not previously been reviewed.
6. Schedule a specific time for the review or it will be put off.
7. Interview athletes who work with the volunteer and obtain their feedback on how the volunteer is doing.

Ask participants if they have any points of clarification before going on to Concept 2.

- **Show Slide #8: Key Concept 2**

KEY CONCEPT #2:

**THERE ARE NUMEROUS BENEFITS TO VOLUNTEERS AND TO THE PROGRAM WHEN
VOLUNTEER PERFORMANCE REVIEWS ARE INCORPORATED INTO THE VOLUNTEER MANAGEMENT SYSTEM.**

Activity:

Ask participants to share the benefits of the performance review system for...

- the Special Olympics Program
- the volunteer, and
- the supervisor to be involved in performance reviews



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Record answers on a flip chart. See below for additional suggested benefits.

Benefits of Performance Reviews **for the Special Olympics Program:**

- Without volunteers we cannot meet the goals of our Mission Statement.
- Strong statement that volunteers are important and that both volunteers and Special Olympics are held accountable to their agreements.
- It is a good time for the Program to express appreciation for volunteer efforts and acknowledge accomplishments.
- Enables volunteers and the Program to re-negotiate their working agreement with one another for the next time period.
- It provides an opportunity for plans to be made to improve volunteer performance in the future (e.g., workshop, new placement).
- Allows staff to share concerns and "dismiss" volunteer if the situation requires that action.
- By taking the time to administer a performance review the Program exhibits its commitment to volunteers.

Benefits of Performance Reviews **for the volunteer:**

- Volunteers want to be successful and respond well to feedback.
- Allows volunteers to express concerns and "escape" an unfavorable situation.
- Provides an educational experience for the volunteer about the Program.
- The volunteer performance review time is when the volunteer can move up in the Program.
- Volunteer feels valued because they are received the same quality time and feedback as paid staff.



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Benefits of Performance Reviews for the supervisor:

- Gives the supervisor the opportunity to address the questions and concerns of the volunteer.
- This is an opportunity where the supervisor can commend the volunteer for doing a good job.
- Provides a private chance to discuss any problems the supervisor has seen with the volunteer's work.

Show Benefits slide and Review.

- **Show Slide #9: Benefits of Performance Reviews**

Presentation:

Discuss some common barriers and resistances to establishing Performance Review systems

- **Show Slide #10: Barriers to Performance Reviews**

Barriers

No review system

Strategies to Overcome

Suggest this be initiated first

Barriers

No policies on reviews for volunteers

Strategies to Overcome

Institute policies on performance reviews and dismissal and show current policy

Barriers

Volunteers are resisting performance reviews

Strategies to Overcome

Involve them in developing the form and process and show them the benefits of performance reviews

- **Show Slide #11: Key Concept 3**



KEY CONCEPT # 3:

THE COMPONENTS OF A GOOD VOLUNTEER PERFORMANCE REVIEW ARE:

- 1) JOB DESCRIPTION WITH SUCCESS INDICATORS
- 2) MUTUALLY AGREED UPON OUTCOMES
- 3) AN IMPLEMENTATION PLAN

Review the following step-by-step process for performance review.

- **Show Slide #12: Volunteer Performance Reviews – Before...**

Before the Session

- The volunteer should fill out self-assessment
- Review volunteer's job description, goals and standards and evaluate performance versus job expectation
- Evaluate on the job expectation versus performance
- Should be done in a private place - stick to the performance based on the job description.
- Interview key individuals who have worked with the volunteer, including athletes or parents.

* Refer participants to the Sample Self Assessment Questions located in their *Participant Workbook*

- **Show Slide #13: Volunteer Performance Reviews – During...**

During the Session

- Review the agreed upon job expectations together
- Share positive feedback and give appreciation for service
- Volunteer shares self-assessment and assessment of Program's support
- Supervisor gives assessment of volunteer's performance



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- Discuss any barriers the volunteer experienced in carrying out the position such as lack of supervision, inadequate facilities/supplies/fiscal resources, conflict in management style.
- Determine whether... staff was available for questions, support was available for “bulk projects,” were mailings mailed out on time, were monies budgeted for successful outcome, etc.
- Discuss future plans for the volunteer in the Program (position, goals, etc.)
- Always speak in specifics – Discuss elements to be included in a written implementation plan.

- **Show Slide #14: Volunteer Performance Reviews – After...**

After the Session

- Write a report for volunteer's file. Including a summary of mutual assessment discussion and any plan to implement in the future.
- Consider other ways to recognize the volunteer at this time such as a letter of appreciation, phone call, etc.
- Follow up on any action plans or agreements made

- **Show Slide #15: Key Concept 4**

KEY CONCEPT #4:

**OUTCOMES FROM VOLUNTEER PERFORMANCE REVIEWS CAN RANGE FROM
COMMENDATION TO DISMISSAL... BY THE SPECIAL OLYMPICS PROGRAM OR BY THE VOLUNTEER.**

Presentation:

One way to keep volunteers continually involved in your Special Olympics Program is to use performance reviews as an opportunity to discuss a volunteer's readiness for new challenge, a need for a change or break. *For example, a Public Relations committee member moves from member to chairperson. Or a coach showing good organizational skills mentoring.*

- If there has been low productivity or morale on the part of the volunteer, it is important to discuss remedies.



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Discuss with participants possible reasons for low volunteer productivity or morale. Elicit answers from the group first, then share the corresponding slide.

- **Show Slide #16: Low Productivity/Morale**

The following may be possible reasons for low volunteer productivity or morale:

- Boredom: too much routine
- Discontent; personality differences
- Idleness: fluctuating workload, insufficient staff
- Lack of interest in the work
- Ill-defined assignments
- Inadequate supervision/workshop
- Misunderstanding of policies and their purposes
- Resentment, overload, or unrealistic deadlines
- Poor communication within work team (staff/volunteers)
- Emotional stress and personal difficulties
- Erratic participation
- Lack of appreciation
- Staff and Special Olympics changes
- Staff resistance to utilizing volunteers

Activity:

Divide the participants into small groups to discuss remedies for low productivity and low morale among volunteers. Ask the groups to identify any specific productivity problems that have occurred within their Special Olympics Program.

Comment on Dismissal:

- **Show Slide #17: Dismissal**



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*Remember: It may be initiated by the volunteer or the Program

1. The volunteer may choose to leave the Special Olympics for any number of reasons.
2. The Program may dismiss volunteers due to non-adherence to rules and Program procedures or due to continued unsatisfactory performance after progressive warnings have been given.
3. Policy should be clearly outlined in the volunteer orientation.

Ask participants to share their Program's policies and procedures regarding dismissal.

⇒ Important Reminder...

Dismissal should be the last course of action for unproductive, unmotivated volunteers. Try to find alternative job placements that suit the volunteers' interests and motivational needs.

Dismissal

(Optional Expanded Section)

Volunteer Initiated Departure

It is advisable, whenever possible, to have an *exit interview* when a volunteer leaves the Special Olympics Program. This provides the Program with reasons surrounding a volunteer's decision to leave and helps address similar issues in the future. Additionally, you can gain a great deal of information which can serve other purposes:

Show Slide #18: Exit Interview Purposes

Purpose of an Exit Interview:



- Tracking
- Recognizing and thanking volunteers
- Locating problems within some departments (for example, high turnover of volunteers)
- Detecting any recruitment problems (for example, not accepting the right person for the job)
- Apologizing for any problems caused by the Program
- Providing closure to the relationship

Volunteer Dismissal by Special Olympics Program

It might be difficult to imagine yourself dismissing a volunteer, and often it is nearly impossible to do because many Programs do not have the appropriate systems in place to perform a termination.

First, follow the protocol set by the Program for dismissing volunteers. When in doubt, use standards in place for dismissal of a paid employee.

⇒ Remind participants, however, that a volunteer must be clearly informed of his/her role and responsibilities through a written job description and must understand from the start of the relationship that certain standards and expectations must be met for the success and continuation of the relationship between the volunteer and the Special Olympics Program.

Essentials of Dismissing Volunteers:

Show Slide #19: Volunteer Dismissal

As a part of orientation, each volunteer should receive a copy of the agency policies on termination, including a policy on suspension and grievance procedures. This provides volunteers with forewarning that volunteers can be terminated. It also assures salaried staff that volunteers can be dismissed from the Special Olympics.

With few exceptions (for example, observed harm to athletes, theft, etc.), volunteers should not be terminated until an in-depth investigation into grievances has occurred and proof of violation of policies or performance standards is found. You may choose to suspend the volunteer while the investigation is taking place. Determine if there are any excusable or extenuating circumstances. Always document, in writing, your investigation and conclusions. It is advised that you confirm the termination in writing with the volunteer.



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Excusing volunteers should be handled fairly and with utmost diplomacy. Don't apologize for your decision. Allow for an appeals process.

Provide notification to staff, clients and others who need to be informed that the volunteer will no longer be working at the Special Olympics.

(End optional Expanded Section)

Summary/Wrap-up/Evaluation

In closing, offer the group some reminders of principles for successful volunteer performance reviews. Close with a review of the 4 Key Concepts. Hand out the evaluation form and ask participants to fill out the form before leaving.

END VOLUNTEER PERFORMANCE REVIEW MODULE

Suggestions for expanded activities for workshops over 55 minutes

1. The length of time to cover this topic will vary tremendously due to your Special Olympics comfort level and experience. If you are simply wishing to suggest that performance reviews be adopted, you may wish to cover concepts 1 and 2 to get buy-in and input on the first workshop and concepts 3 and 4 in a second workshop which focuses on the "how-tos."
2. The section on dismissal is strictly optional and is not included in the time frame for this workshop. Information is given because it will naturally fall into any discussion on evaluation. You may wish to copy the transparencies for participants to get information and share/review your Special Olympics Program's policy on dismissal. Without a written policy and procedure, this becomes a very time-consuming and sticky issue.
3. If there is resistance by current volunteers for the introduction of performance reviews it would be advisable to have a workshop with them to expose them to the mutual benefits of the process and solicit their ideas for a process that would be effective and acceptable in your Special Olympics.



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4. If you are devoting most of the workshop to "selling" the concept of performance reviews for volunteers, you may wish to break people into small groups and have them share any positive personal experiences they have had related to personal growth coming from the experience of having a performance review.



Suggested Resources on Performance Reviews

On-Line Resources:

<http://energizeinc.com> Energize, Inc. is an international training, consulting and publishing firm specializing in volunteerism. Their goal is "to connect leaders of volunteers with resources, information and ideas generated from around the world."

<http://www.iave.org>. IAVE is "the only international organization with the mission to promote, celebrate, and strengthen volunteerism worldwide." The International Association for Volunteer Effort (IAVE) worked in close cooperation with the United Nations Volunteers and was a major contributor in establishing the International Year of the Volunteer.

<http://e-volunteerism.com/> The "Electronic Journal of the Volunteer Community," e-Volunteerism is a quarterly online publication that caters to volunteer leaders and managers.

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