



Special Olympics

VOLUNTEER TRAINING
SERIES

**PERFORMANCE
REVIEWS**

Participant's Workbook



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.

Prior to establishing formal evaluation procedures, the Special Olympics staff should be evaluated in a similar process. 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.



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Learning Objectives:

- The process for volunteer performance review
- Purposes, benefits and barriers to instituting volunteer performance reviews
- Suggested procedures and tools
- Potential outcomes of performance reviews

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Key Concepts of Volunteer Performance Reviews

1. Successful performance reviews provide for a periodic opportunity for communication between a person who assigns work and the person who performs it.
2. There are numerous benefits to the volunteers and the Program when volunteer performance reviews are incorporated into the volunteer management system.


G-3



Key Concepts (continued)

3. The components of a good volunteer performance review include:
 - Job description with success indicators
 - Mutually agreed upon outcomes
 - An implementation plan
4. Outcomes from volunteer performance reviews range from commendation to dismissal - by the Program or the volunteer.

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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.

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Essential Elements of a Volunteer Performance Review

- Volunteers learn about review system when they enter the organization
- Mutuality is key
- Performance reviews are based on previously agreed upon job description, standards, etc.
- No surprises

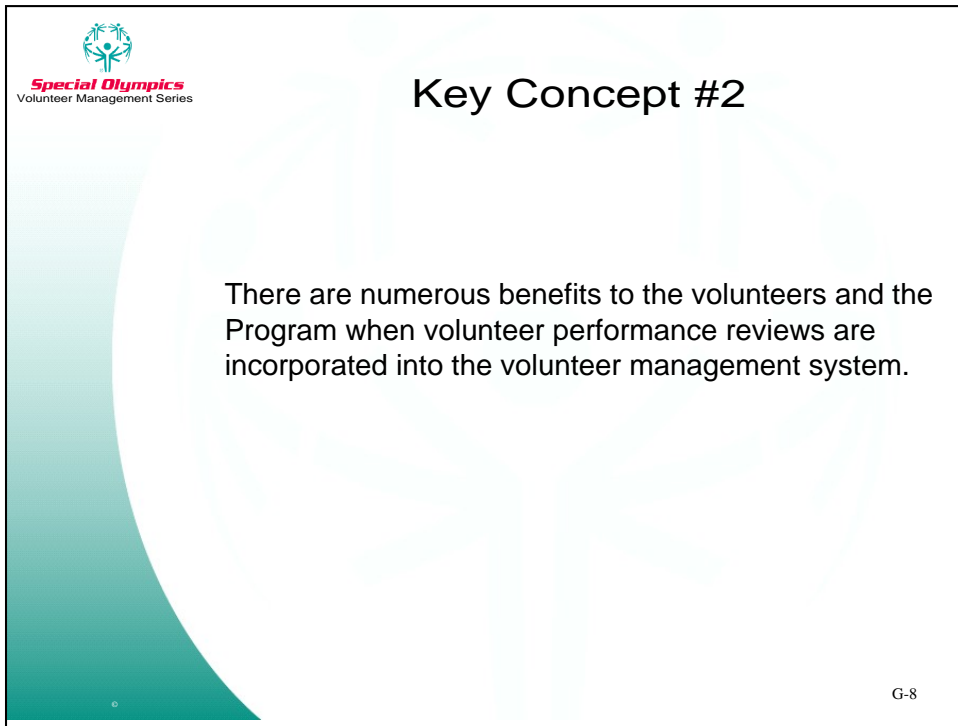
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Essential Elements of a Volunteer Performance Review (continued)

- The process can be formal or informal
- Gradually invite current volunteers to participate starting with a self-assessment
- Schedule a specific time for evaluation or it will continually be put off!

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A presentation slide titled "Key Concept #2" with a light blue background and a green gradient on the left side. The slide contains the Special Olympics logo and text about the benefits of performance reviews.


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Key Concept #2

There are numerous benefits to the volunteers and the Program when volunteer performance reviews are incorporated into the volunteer management system.

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Benefits of Volunteer Performance Reviews

- It is a good time for the Program to express appreciation for volunteer efforts and acknowledge accomplishments.
- It provides an opportunity for plans to be made to improve volunteer performance in the future.
- Send the message that volunteers are important and that both volunteers and the Program are held accountable to their agreements.
- Allows volunteers to express concerns and "escape" an unfavorable situation.
- Volunteer feels valued because they are received the same quality time and feedback as paid staff.
- Gives the supervisor the opportunity to address the questions and concerns of the volunteer and any of his/her own.

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Barriers to Volunteer Performance Reviews

<u>Barrier</u>	<u>Strategies to Overcome</u>
1. "Our staff doesn't receive performance reviews"	Initiate staff reviews
2. "We have no policies on volunteer performance reviews"	Institute policies on performance reviews and dismissal
3. Current volunteers are resisting the idea	Involve them in developing the form and process

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Key Concept #3

The components of a good volunteer performance review include:

- 1) Job description with success indicators
- 2) Mutually agreed upon outcomes
- 3) An implementation plan

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Volunteer Performance Review

Before the Session:

- Have the volunteer fill out self-assessment
- Review volunteer's job description, goals, standards, etc.
- Do an evaluation on the job expectation versus performance

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Volunteer Performance Review

During the Session:

- Together, review job expectations
- Share positive feedback and appreciation
- Volunteer shares self-assessment and assessment of Program support
- Supervisor assesses volunteer's performance
- Discuss barriers to success for the volunteer
- Discuss future plans for the volunteer

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Volunteer Performance Reviews

After the Session:

- Write a signed report for volunteer's file
- Follow up on action plans or agreements

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Key Concept #4

Outcomes from volunteer performance reviews can range from commendation to dismissal - by the Program or volunteer.

G-15




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Low Volunteer Productivity & Morale

- Boredom and Idleness
- Fluctuating workload
- Lack of interest in the work
- Ill-defined assignments
- Inadequate supervision/training
- Resentment, overload, unrealistic deadlines
- Emotional stress and personal difficulties
- Erratic participation
- Lack of appreciation by staff
- Staff resistance to utilizing volunteers

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Dismissal

Remember... Dismissal is a two-way street.

A volunteer may just as easily “dismiss” a Program as a Program may remove the volunteer.

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Exit Interview Purposes

- Tracking
- Recognizing and thanking volunteers
- Locating problems within some departments, divisions, etc., in the organization
- Detecting recruitment problems (e.g., wrong person)
- Apologizing for any problems caused by the Special Olympics Program (keep good PR in community)
- Providing closure to the relationship



Volunteer Self-Assessment Form - Sample Questions

1. Do you feel you are reaching the expectations listed in your job description (goal setting, etc.)? If not, share your reasons for the gap.
2. Was the estimated time to accomplish your volunteer work realistic? Comment.
3. Did the organization provide adequate orientation, training, supervision and resources for you to accomplish your job? Comment and offer suggestions for improvement.
4. What have been your greatest satisfactions on the job?
5. What have been your greatest disappointments on the job?
6. Were other volunteers and staff receptive and appreciative of your volunteer work? Comment.
7. What were your areas of growth in your volunteer job?
8. Over-all I would rank my performance as:
 - Superior, exceeding expectations
 - Excellent, met expectations
 - Needing improvement, did not meet expectations
 - Comments to explain above answer:
9. What type of work and time commitment do you desire for next year? (i.e., same position, new challenges, departure...)
10. Other comments, suggestions, etc.



Ideas for Volunteer Evaluation Criteria

Rate the volunteer on:

- Job performance
- People skills
- Responsibility and Motivation

People Skills: (example of rating systems)

Example 1 – descriptive gradient:

- Adheres to confidentiality policy
- Relates well to clients, staff and volunteers
- Is courteous and tactful
- Cooperates with team of staff and co-workers
- Is well groomed and adheres to dress code

Example 2 – numerical gradient:

1. Superior - Exceeds requirements
2. Excellent - Accomplished tasks
3. Fair - Tasks not fully accomplished
4. Unsatisfactory - tasks not accomplished

You need to determine pertinent factors and a rating system that is appropriate for your Program and volunteers.

It is important that the volunteer and staff or lead volunteers discuss any performance review and agree to the next steps, particularly if the job is not being accomplished. Numerous factors, both individual and organizational, may be effecting a volunteer's low productivity or morale.



Suggested Resources on Volunteer Management

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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Participant Evaluation Form

Thank you for taking the time to share your evaluation of today's seminar. Your critique is valued and will be considered as we continually strive to improve our support to all personnel who team with volunteers.

The learning objectives in this workshop were: ___met __partially met __not met

- 1. Explain how a performance review process fits into the total supervision and support process of the organization
- 2. Discuss the purposes, benefits and barriers of instituting or enhancing a performance review process
- 3. Use a suggested process and tools for performing the review
- 4. Explain the potential outcomes of performance reviews

Comments:

The session was:	Yes	No
▪ helpful	___	___
▪ provocative	___	___
▪ practical	___	___
▪ well-paced	___	___
▪ too short	___	___
▪ too long	___	___

Comments:



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The trainer was:	Yes	No
▪ knowledgeable	___	___
▪ prepared	___	___
▪ organized	___	___
▪ enthusiastic	___	___
▪ good discussion facilitator	___	___

Comments:

In what ways can you utilize this material in your work?

What, if anything, do you plan to do differently as a result of this training?

What additional information on this on any other topic dealing with volunteers would be helpful to you in your work?

What suggestions do you have to strengthen this workshop?

Further comments or suggestions:

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