

# Volunteer Evaluation and Performance Management

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Volunteer evaluations and performance management are a key part of the volunteer management cycle. They help to build successful volunteer experiences, increase understanding of volunteer impact, and measure individual and collective outcomes in volunteer programs.

Set yourself up for success by introducing the evaluation process to volunteers at the onboarding stage and by being clear with your volunteers about the need for evaluation. Or, if you did not set up an evaluation process in advance, invite volunteer(s) to help you develop and launch a process.

Evaluation and performance management tools fall into two general categories:

1. Informal – through casual check-ins with volunteers delivering ‘real-time’ feedback and connection, and
2. Formal – through planned and scheduled evaluation processes such the end of probation evaluation, annual evaluation, or self-evaluation. Formal evaluation can include scheduled interviews, surveys or questionnaires, or file audits

A clear commitment to performance management lens sends a message that your organization cares about volunteers’ satisfaction and feedback.

Evaluation and feedback requires:

1. Shared goals:
  - a. Organization mission/vision & role impact
  - b. Building the volunteers skills
  - c. Enjoying the experience
  - d. Serving the needs of others

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2. Clear foundation:
  - i. Mutual understanding of the role and expectations, both by supervisor and volunteer. Build relationships and collaborate.
  - ii. Key considerations:
    - a) Trained, knowledgeable supervisors who respond to needs
    - b) Thorough volunteer position descriptions that include:
      - Mission and vision
      - Goals and impact of the role or project
      - Duties and responsibilities
      - Schedule and commitment
      - Training and supervision process
      - Work setting
      - Screening/onboarding requirements (interviews, CRC etc)
      - Evaluation process (formal/informal annual, project based?)
3. Timely communication:
  - i. Information Evaluation
    - a. Immediate feedback for a job well done
    - b. Fair and kind feedback to improve on future performance.
  - ii. Formal Evaluation
    - a. Scheduled follow up on required check-ins as laid out in position description for example for post shift, probation period, annual/bi-annual performance reviews etc.
4. Recognition:

Highlight impact of the volunteer's involvement, both time given and outcomes achieved
5. Collaboration: Invite and value volunteer input through strategic communications such as annual Surveys /questionnaires, informal info gathering etc.

## How to Engage in Informal Evaluation:

1. Be present and supportive, especially during probation period but allow volunteers to do their jobs.
2. Check in with open ended questions such as: “how did your shift go?”, “do you need anything”, “how can we support you”, “how can we improve on this experience/ outcome?”
3. Pay attention to the individual volunteer and respond with specific feedback “you did a great job with...” “I saw that you may have been struggling with..., do you want to talk about this?”
4. Say thank you, be specific

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## How to Set Up Formal Evaluation:

1. Create a standard questionnaire. (Keep it short and simple. , Use a rating system, for example “needs improvement” through to “outstanding”. Provide some short text options as well.
  - a.. Based on each position description define several key areas of success and involve experienced volunteer. Also include positive job performance descriptor such as “on time”, “works well with others”, etc.
  - b. Include opportunities for volunteers to give feedback and evaluate your organization
  - c. End with action items for review at next meeting
2. Share questionnaire in advance with volunteer
3. Meet to review the evaluation questionnaire
  - a. Celebrate successes
  - b. Shine a light on areas where improvements could be made by your organization and your volunteer.
4. Together, plan for any skill and knowledge development by both parties.

Resources <https://vqstrategies.com/volunteer-performance-evaluations/>  
<https://www.missionbox.com/article/363/writing-useful-job-descriptions-for-volunteers>  
<https://volpro.net/managing-volunteers/volunteer-supervision/>  
<https://www.missionbox.com/article/362/managing-volunteers-5-elements-of-effective-evaluation>

## Difficult Conversations

We all face difficult conversations at times. , However, these conversations can be opportunities that help volunteers succeed, avoid bigger challenges, positively impact mission and develop leadership tools, and mitigate risk.

Poor volunteer performance and conflict can result in resentment, lost potential, divisions, frustrations, low morale, loss of reputation and loss of volunteers. A healthy volunteer program handles difficult conversations in a timely and consistent manner.

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## Steps to Handle Difficult Volunteers and Situations.

1. Prepare to meet your volunteer
  - **Define the problem:** Problems rarely stem from one issue. Is the problem based on the volunteer's competency, interpersonal chemistry, or a lack of responsibility? Is there a training gap, lack of support, change management needed etc. Be specific and direct e.g. "We have noticed that you were late opening the thrift store last Tuesday morning. You seem to be late more often lately. What's changed for you?"
  - **Articulate the impact of the problem and the reasons why it is important to deal with it:** Being specific is important. Putting the issue in context helps the volunteer understand the impact of their behavior. e.g. "When the shop opens late we let our customers down. How do you think they feel when they cannot come into the store at a posted opening time?"
  - **What is your organization's policy?** Your volunteer program policies should support your identified concerns and next steps.
  - **What does success look like:** for the mission of your organization, for the volunteer and for you as a leader. Negotiate a plan for change that is manageable and measurable, and that everyone agrees to. Ask the volunteer "How can we turn this around for our customers?"
  - **What will you discuss and what action steps are needed for a positive outcome** e.g. "As it is important to you to keep this shift we can keep the same schedule for the next four weeks. If your lateness continues, we will have to look at an alternate plan."
2. Engage with your volunteer.
  - **Be direct and clear.**
  - **Be careful,** invite another leadership person to participate in the process (with both parties agreement.)
  - **Do not apologize** for having the conversation
  - **Listen carefully and allow ample time for feedback and discussion.**
  - **Define next steps** to find solutions including retraining, redirecting to another role or ending involvement with your organization.
  - **Keep a record** of interactions and next steps.
3. Follow Up
  - **Act on the plan.** Both parties should have items and deadlines for follow up.
  - **Check in soon** after your conversation.
  - **Review your policies.** Ensure evaluation and expectations are included in every step of the volunteer cycle.
  - **Take pride in your leadership and learning.** Difficult conversations are difficult. Give yourself credit for the work and review how you have learned and grown.

Difficult conversations should never come as a surprise to either party. With consistent evaluation and communication, volunteers should have a sense of how their performance is going and the management team will know where challenges are occurring.

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## More Resources:

[https://www.volunteer.ie/wp-content/uploads/2017/08/Dealing\\_with\\_annoying\\_habits\\_issues.pdf](https://www.volunteer.ie/wp-content/uploads/2017/08/Dealing_with_annoying_habits_issues.pdf)

<https://volunteerplaintalk.files.wordpress.com/2019/10/difficult-conversations-with-volunteers.pdf>

<https://careynieuwhof.com/5-healthy-ways-to-handle-a-difficult-volunteer/>

## About Volunteer Victoria

The Greater Victoria Volunteer Society, more commonly known as Volunteer Victoria, is a volunteer centre and hub to help volunteers, volunteer managers, and volunteer-led organizations.

### Our mission is to *inspire and empower volunteerism!* We:

- Help volunteers and volunteer-led organizations
- Build and share knowledge through the delivery of professional development, training, learning and networking opportunities
- Offer specialized services and resources that advance the quality of volunteer programs and build capacity
- Treat all members, volunteers, partners, staff and stakeholders with fairness, dignity, and respect
- Provide welcoming spaces that embrace diverse ideas, knowledge, cultures, and experiences

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