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peopleLINK Social Work Consulting & Training

联众力社会工作咨询中心

Strengthening Volunteer Management in Chinese NGOs

Train-the-Trainer Workshop

Beijing

December 4-6, 2005

Train-the-Trainer Workshop: Introduction

- Introduction to the Strengthening Volunteer Management Project and Project Team
- Introduction to American Experts: Ms. Arlene Schindler and Ms. Marilee Chinnici-Zuercher
- Introduction to the Train-the-Trainer Workshop
 - format
 - materials
 - content
 - open workshop
- Introduction to the Training Class

Training Basics: Requirement for a Successful Training Program

- Clear and accepted purpose
- Specific and known objectives
- Suitable environment for workshop purpose
- Attention to logistical details
- Realistic schedule
- Prepared group leaders and trained associates
- Effective utilization of resource persons
- Varied and appropriate presentation techniques
- Participant exchanges, both formal and informal
- Participant involvement in training activities
- Adequate processing of group activities

Training Basics: Responsibilities of Trainer

- Create the workshop design – how to communicate the information?
- Choose appropriate training techniques – how to *best* communicate the information given the audience members needs/experience/desires/etc.?
- Determine the critical learning points – what is the information to be communicated?
- Create instructional materials including handouts to support and add to the learning experience – what will help teach the subject?
- Introduce and elicit information from the participants.

Training Basics: Responsibilities of Trainer

Before a trainer asks *how* best to conduct a training session, they should ask *why* the session is being held in the first place.

Is it to:

- impart knowledge?
- develop specific skills?
- modify attitudes?
- influence how participants do their job?

Are there other reasons that the group can think of as possibilities for the *why* of training?

Training Basics: Responsibilities of Trainer

A trainer must know their audience:

- what are their expectations for the workshop?
- what do they want to learn/gain from the workshop?
- what are their positions/roles in their organizations?
- what is their experience with regard to the information at the training session?
- how will they best receive the content of the workshop?

Training Basics: Responsibilities of Trainer

A trainer should always try to communicate clearly and do the following:

- identify the learning objectives
- give clear and precise instructions
- confirm understanding of learning concepts
- paraphrase for clarification
- make no assumptions
- allow sufficient time for questions

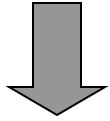
Training Basics: Responsibilities of Trainer

A trainer should try to accommodate the unique learning characteristics of the audience, and try to do the following:

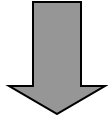
- present information in a variety of ways
- recognize and use the experience of the participants
- provide for active exchanges between participants
- consider the status, roles, and relationships that exist within the group
- acknowledge the time constraints and responsibilities of adults/professionals
- use “games” judiciously

Training Basics: Tasks of a Trainer

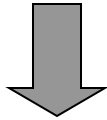
Create/Maintain Learning Environment



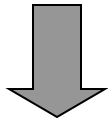
Manage the Continuity Line



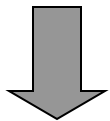
Present Information



Control Individual Participation



Direct/Monitor Activities



Process Information

Training Basics: Training Techniques

There are several training techniques a trainer can employ, and some may be more appropriate than others for accomplishing a specific learning objective, for example:

- lecture – for special, limited, or expert information
- small group discussion – for examining critical points and options
- demonstrations – for showing the “how to”
- role play – for practicing specific learned skills
- overheads/powerpoint – for controlling the focus and the progression of information
- flipcharts – for recording, saving, and manipulating information
- other audio-visual and technical equipment

Training Techniques: Workshop

Divide into groups to discuss the purpose of employing the techniques below, as well as the advantages and limitations of each.

- Demonstration
- Chalkboard
- Flipchart
- Pre-drawn Chart
- White Board
- Overhead Projector
- Opaque Projector
- Slides/Filmstrip
- Audio Cassette
- Video Cassette

Training Basics: Give Clear Instructions

1. Provide the Rationale
 - a) Why is the learning important?
 - b) How does this activity reinforce/augment/clarify the subject?
2. Explain
 - a) What will the participants do?
 - b) What will be the product of the activity/exercise?
3. Describe the Content
 - a) How will the participants do the activity/exercise?
 - b) What will be the size of the group, and why?
 - c) What will be the composition of the group, and why?
 - d) In what timeframe will the activity/exercise be accomplished?
4. Specify the Reporting Format
 - a) What will participants be expected to report?
 - b) What is the format of that report?

Training Basics: Training Techniques

Additional training tips:

1. Participants are partners in the training session.
2. Participants have an equal responsibility for the successful outcome of the training.
3. Participants are the greatest asset to a “trainer in trouble”.
4. Participants should be viewed both as a group and individually during a training session, but the trainer’s overall responsibility is to the group and not any one particular participant.

Introduction to Volunteer Management

- Trends in Volunteerism in the United States
 - Statistics
 - Benefits of Volunteer Service
 - To Individual
 - To Organization
 - To Society
 - Volunteer Administration
 - Standards for a Volunteer Program
 - Volunteer Management in NGOs and Role of Volunteer Centers

Introduction to Volunteer Management

- Definition of a Volunteer
 - volunteer characteristics
 - compulsory volunteer
 - stipended volunteer
 - service learning
 - long term vs. episodic volunteers
- Types of Volunteers
 - Youth
 - Retirees
 - Professionals
 - Corporations

Phase 1: Organizational Set-up

Step 1: Develop a Mission Statement

Step 2: Conduct a Needs Assessment

Step 3: Draft Job Descriptions to Meet
Organization Staffing Needs

Step 4: Recruit & Place Volunteers

Step 1: Develop a Mission Statement

A mission statement is an organization's set of guiding principles. It is a written declaration clearly describing the purpose for which the organization was established.

A mission statement is a cornerstone against which the organization can evaluate current programs and define new activities. It serves as a reminder of the reason the organization was created.

Mission Statements

An effective mission statement:

1. states the purpose of the organization
2. identifies the specific need which will be addressed, and is the focus of the organization
3. accurately and clearly defines the reason for the organization and its activities
 - a) to assist children with special needs succeed in school
 - b) to raise public awareness of HIV/AIDS
4. provides information about both what the organizations does, and to or for whom the organization works to impact/benefit/influence

Mission Statements

An effective mission statement outlines the goals of the organization, sets priorities, and communicates the reason for the existence of the organization.

Mission statements should not be restrictive in terms of location or program focus.

For example: ADD

Mission statements should not automatically restrict or exclude future activities of the organization which may be a natural outgrowth of current programs.

For example: ADD

Mission Statements

It is essential that everyone involved with an organization, including paid staff, volunteer staff, and Board members, be familiar with the mission statement and understand how their individual participation contributes to, or is restricted by, this statement.

Mission statements should be reviewed annually as part of an organization's self-evaluation, and they should help the organization determine,

- a) if the mission statement is still relevant to current needs and realities
- b) the degree to which current (and future) activities support the organization's mission

Mission Statements vs. Vision Statements

A mission statement describes the **REASON** for the organization's existence; a vision statement describes what the organization **HOPES** to achieve.

Example

Mission: The mission of organization ABC is to connect people and resources for the enrichment of community life through volunteerism and collaboration.

Vision: To collaborate with 50 NGOs for the creation of 1000 volunteer positions in the areas of environment, senior care, and abuse prevention.

Mission Statement: Workshop

Divide into small groups and discuss mission statements, vision statements, and the strategic plan of an organization.

Read through the examples below and discuss the structure of the mission statement, the types of organizations represented, and what possible vision statements might accompany these mission statements.

Draft a mission statement for an organization; circulate to group for comment. Now, draft a vision statement for that organization; circulate to group for comment.

Example:

Theatre Works: To provide diversified, creative quality performing arts programs accessible to all ages in the community; to be cutting edge when producing the best of the past and the present; and to provide a balance between art and nurtured growth, enriching the quality of life for all those touched by Theatre Works.

American Red Cross: The American Red Cross, a humanitarian organization led by volunteers and guided by its Congressional Charter and the Fundamental Principles of the International Red Cross Movement, will provide relief to victims of disaster and help prevent, prepare, and respond to emergencies.

Slovak Academic Information Agency: Connecting people and resources to improve community life through volunteerism and collaboration.

Parents Anonymous of Arizona: Parents Anonymous of Arizona strengthens families and prevents child abuse and neglect

Step 2: Conduct a Needs Assessment

An organization's *staff* is a team of individuals – both paid and volunteer – who under the leadership of the executive staff and Board, manage activities designed to fulfill the mission of the organization.

A needs assessment will help to determine the organization's staffing needs.

Conduct a Needs Assessment

An organization can conduct a Needs Assessment to determine the following:

1. Whether volunteers are needed at the organization
2. In what areas volunteers are needed, i.e. for administration, programs, translation, etc.
3. What skills volunteers would need to have to assist the organization
4. How frequently and at what times the organization needs volunteers, whether it be certain times of year or times of day
5. Who will be responsible for supervising volunteers in the organization
6. What kinds of training volunteers would need to receive
7. Who will be responsible for the training of volunteers

Needs Assessment: Workshop

1. Break into groups to discuss needs assessments
 - a) has your organization completed a needs assessment for volunteers?
 - b) was the assessment helpful? If so, what were the strengths of the assessment, and how can they be replicated for future assessments? If not, how could the assessment have been improved?
 - c) how did your organization translate the needs assessment into job descriptions and volunteer placements?

Step 3: Job Descriptions

1. Staffing needs for both paid staff and volunteers are determined by the organization's strategic and program plans.
2. Staff skill and experience requirements are determined by the activities required to achieve program goals.
3. Effectively written job descriptions are required for each paid and volunteer position to ensure agreement on expectations

Job Descriptions

Job descriptions should include the following elements:

- identification of skills needed to perform the work effectively
- principal types of work for which the individual will be responsible
- outcomes expected from that work
- support to be provided by the organization
- other expectations associated with the position, i.e. hours per week, to whom does the employee or volunteer report, dress requirements, etc.

Job descriptions are tools to be used at regular intervals to evaluate and adjust expectations for individual performance.

Job Descriptions: Workshop

Divide into small groups and discuss how your organization conducts staffing needs assessments and drafts effective job descriptions.

Read through the examples provided and discuss their strengths and weaknesses.

Draft a plan for a needs assessment for your organization; circulate to group for comment.

Draft a job description for your organization; circulate to group for comment.

Step 4: Volunteer Recruitment

1. Recruitment techniques must target the appropriate volunteer community, and could include the following:
 - a) publicizing volunteer opportunity in specific locations where the desired skills will likely be found. For example, sending an announcement for volunteer teachers to a school
 - b) advertising in newspapers, membership publications, and associations related to the organization's mission
 - c) word of mouth
 - d) personal invitation from staff of organization

Volunteer Recruitment

1. Review of required documentation, including some or all of the following:
 - a) volunteer applicant resume
 - b) letters of recommendation
 - c) school records

2. Applicants should be sorted into the following categories for the position for which they are applying:
 - a) qualified
 - b) may be qualified
 - c) not qualified
 - a) when an applicant is not qualified for one position, determine whether there is another position in the organization that they could fill depending on their skills and experiences

Volunteer Recruitment: Interviews

1. Interview applicants to determine whether they are suitable for the position based on the following:
 - a) the needs of the organization
 - b) the skills and experience of the applicant
 - c) his/her willingness to accept the conditions and responsibilities of the position
2. Interviews supplement an application form and provide answers to the following questions:
 - a) educational background
 - b) work and volunteer experience
 - c) how have past experiences equipped the applicant for the volunteer assignment
 - d) what work related experiences have been most enjoyable for the applicant
 - e) what specific skills and talents can the applicant offer
 - f) what limitations need to be considered, i.e. disabilities, time constraints, geographic location, etc.
 - g) additional areas of interest

Volunteer Recruitment: Interviews

1. Interviews serve as opportunities to share information with volunteer applicants about the organization.
 - a) the mission of the organization
 - b) its expectations from volunteers
 - c) values and principles for the operation of its programs
 - d) requirements for volunteers
 - e) duration of the volunteer assignment and time requirements
 - f) other volunteer positions at the organization that might be better suited to the applicant
2. Interview comment sheets are useful forms to keep in an applicant's files for use in performance evaluation and recognition.

Volunteer Recruitment: Workshop

1. Break into groups to discuss volunteer recruitment, including the following:
 - a) how does your organization recruit volunteers?
 - b) what types of volunteers does your organization actively recruit?
 - c) what skills are required for your organization's volunteers, and how do you target applicants with matching skills or experience?
 - d) conduct mock interviews within groups, and report on what questions or approaches were most effective, and what were least effective.
 - e) what forms or templates does your organization use for recruiting, interviewing, and placing volunteers?

Phase 2: Management of Volunteers

Step 1: Volunteer Orientation

Step 2: Supervision & Evaluation

Step 3: Recognition & Reward

Step 1: Volunteer Orientation

The purpose of a volunteer orientation is to provide information relative to the physical, procedural, and relational resources and constraints within which the job is to be accomplished.

Before an organization can conduct a volunteer orientation, they must decide the following:

- what information will be presented in the orientation
- who will deliver the orientation to new volunteers
- what materials will be made available to the volunteer at the orientation
- what training beyond the orientation, if any, will need to take place before the volunteer can begin at the organization

Volunteer Orientation

Orientation of volunteers should be comprised of the following components:

- a) Overview of the organization (when did the organization start, why did it start, how has it developed over the years)
- b) Review of mission and vision statement
- c) Program descriptions
- d) Job responsibilities
- e) Training requirements
- f) Evaluation and supervision of volunteer
- g) Organizational chart
- h) Physical layout of the workplace
- i) General organizational rules and procedures
 1. safety
 2. confidentiality
 3. reimbursement
 4. personnel procedures
 5. supervision

Step 2: Supervision and Evaluation

Supervision is the monitoring and constant adjustment of all components of the activities required to complete a task.

Effective supervision consists of the following:

- respect for the individual volunteer
- equal and unbiased treatment of volunteers
- clear, simple, and ongoing communication
- flexibility and willingness to make changes to work assignments and time commitments
- support via tools, information, and encouragement
- neutrality when managing conflicts
- recognition of the accomplishments of the volunteer
- recommendation for formal recognition, when applicable

Supervision and Evaluation

1. Supervision does not have to be a formal review session with volunteers. Effective supervision can be informal, on-going evaluation and feedback of the volunteer's performance at the organization.
2. Supervisors can meet regularly with volunteers to determine their degree of satisfaction with the assignment and their comfort with the required skills. Supervisors can also exchange ideas with the volunteer regarding improving performance or fulfilling specific tasks.
3. Evaluations should be based on work performance as measured against previously agreed-upon objectives.
4. All reviews and evaluations, both positive and negative, should be written and signed by both supervisor and volunteer.

Supervision and Evaluation

How?

1. Develop a system for volunteer performance assessment.
 - a) Review job description
 - b) Identify performance criteria
 - c) Evaluate volunteer duties/responsibilities and performance
 - d) Review supervision of volunteer
 - e) Conduct a review session with volunteer
 - f) Complete evaluation form and distribute to volunteer

Evaluation: Forms

1. Supervisor Evaluation of Volunteer

1. General

- a) Reports for assignments and/or meetings
- b) Relates well to staff, volunteers, clients
- c) Displays courtesy, tact, and patience
- d) Understands objectives and assignments
- e) Performs assignments effectively
- f) Expresses opinions and disagreements in mature manner
- g) Accepts supervision in a positive fashion

2. Overall Performance

- a) Performance – develop scale (1-5; poor, fair, good, excellent; did not meet expectations, met expectations, exceeded expectations; etc.)
- b) Major strengths and weaknesses
- c) Comments

2. Volunteer Evaluation of Position and Organization

- a) Volunteer should evaluate whether position goals are met by organization; whether they are being effectively managed and incorporated into the organization; and provide comments on the position, organization, and supervisor.

Evaluation: Workshop

1. Break into groups and draft sample evaluation forms for both supervisors and volunteers.
2. Conduct a mock evaluation session with a volunteer.
3. Review the effectiveness of the evaluation form, and discuss possible changes if necessary.
4. Review with the group the mock evaluation: what questions does a supervisor ask, how does the supervisor present performance indicators to volunteers, how can the supervisor be open to comments from the volunteer?

Step 3: Recognition & Reward

Recognition is an ongoing process that daily affirms the importance of the individual. It is usually expressed subtly but recognized immediately through such things such as:

- a) invitations to attend staff meetings and socials
- b) acceptance in the workplace
- c) inclusion in office memos and access to information
- d) inclusion in decisions that are relevant to them
- e) special recognition in the presence of another person for work well done
- f) supervision by a supervisor who:
 - a) clearly explains work expectations and duties
 - b) trains individuals for their assignment
 - c) supervises them fairly
 - d) listens to their suggestions
 - e) adjusts schedules when needed

Step 3: Recognition & Reward

Tangible Forms of Recognition can include the following:

- provide or treat to teas, luncheons, or dinners
- award pins, certificates, plaques
- cover expenses for conferences, workshops, etc.
- provide letters of recommendation
- plan special events on the International Day of the Volunteer
- send cards or flowers on birthdays and holidays

Intangible Forms of Recognition can include the following:

- remembering and calling volunteers by first name
- acknowledging achievements and milestones
- suggesting additional or more challenging assignments
- promoting image of volunteer's significant role in the organization
- ensuring pleasing and comfortable working conditions
- respecting confidentiality and sensitivities
- smiling

Recognition & Reward: Workshop

1. Break into groups and discuss ways in which your organization can (and/or does) recognize and reward your volunteers?
2. In what ways can an organization say thank you to a volunteer for their ongoing commitment to the organization or for work well done on a specific project?
3. In what ways can an organization and/or supervisor encourage good performance from volunteers?
4. What are the advantages/disadvantages to public recognition; what are the advantages/disadvantages to private recognition?