

Addressing Inappropriate Behaviors of Volunteers: A Guide to Decision-Making

DECIDE



A logical model that allows professionals to critically analyze situations and make decisions based on factual information.

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Introduction

In recent years there has been increased attention directed towards volunteer staffing in both non-profit and for-profit organizations. The increased attention has largely been focused on the appropriate selection, orientation, and recognition of volunteers.

The daily management of the volunteer program, which includes addressing personnel issues, is another very important, but often overlooked, aspect of volunteer management. The manner in which administrators address personnel issues involving volunteers may be similar to the process followed for paid staff. However, many organization administrators who work with volunteers are finding that they need additional guidance and support when addressing personnel issues with volunteers.

This resource provides a step-by-step process that may be helpful when working through volunteer issues. Originally developed for use in a Cooperative Extension setting, the suggestions are applicable regardless of the organization. The document is not written to replace existing organization procedures, but rather to serve as a resource for organizations not having procedures or to enhance existing procedures. Administrators who desire to implement suggestions contained within this document are encouraged to consult their organizational legal counsel and human resource leader.

For more information, please contact:

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This document continues to evolve as the authors work with Extension and other non-profit organizations when addressing volunteer behaviors. Ultimately it is our desire for this document to serve as a resource and training guide.

Objectives

This document is intended for volunteer managers who are addressing issues associated with the behavior of volunteers. More specifically, the document:

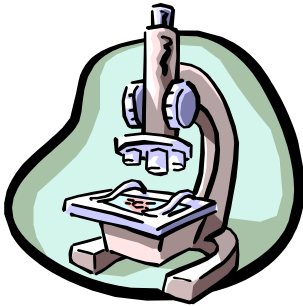
- (1) Outlines an overview of one process to use when addressing volunteer behaviors;
- (2) Provides suggested questions and situations to consider when managers of volunteers are addressing volunteer behaviors;
- (3) Communicates appropriate actions to take by the manager of volunteers; and
- (4) Provides resources to assist with the documentation of volunteer behaviors.

D *iagnose*

Step 1: Diagnose the problem or situation that involves the volunteer(s)

Programmatic	<p>Content of the services delivered</p> <p>-----</p> <p><i>Examples:</i> educational component of the club meeting is problematic; leader focuses inappropriately on continual fund raising activities; volunteer is inappropriately completing the members' project books for them; etc.</p>
Organizational	<p>How the services are being carried out</p> <p>-----</p> <p><i>Examples:</i> group members are not provided opportunities to participate in decision making; finances are managed poorly; inadequate supervision occurs during recreational activities; organizational policy is not followed; etc.</p>

Safety	<p>Related to youth, volunteer, or paid staff</p> <p>-----</p> <p><i>Examples:</i> youth participant is assaulted by another member or volunteer; volunteer threatens another volunteer or paid staff with physical assault; volunteer continually yells at youth; etc.</p>
Personalities/Personal	<p>Between youth-volunteer, volunteer-volunteer, or volunteer paid staff</p> <p>-----</p> <p><i>Examples:</i> volunteer holding a “grudge” against another volunteer because of the quality of animals they are able to purchase; “that” volunteer’s’ club always wins because they cheat; that youth was suspended from school because... and should be suspended from 4-H; the agent just doesn’t like me; a group of volunteers “ganging” up on another volunteer because she doesn’t seem to do his fair share; “that” volunteer is always causing trouble; etc.</p>



Step 2: Evaluate the situation for potential causes

<p>Is the potential situation a:</p>	<p>Related to the volunteer's effort, knowledge, or ability?</p> <p>-----</p> <p><i>Example:</i> volunteer does not understand how to involve youth in decision making; volunteer lacks an understanding of the developmental difference between a six-year-old and an eleven-year-old; committee volunteer is only interested in selecting the judge of the county fair; etc.</p>
	<p>Result of the task being too difficult?</p> <p>-----</p> <p><i>Example:</i> managing complex county fund raising projects without special training; explaining the overall purpose and philosophies of 4-H to the director of a local community center without public speaking training; assigning a volunteer to manage a group of twenty-five youth; etc.</p>
	<p>Result of personal obstacles?</p> <p>-----</p> <p><i>Example:</i> unable to attend evening trainings due to a lack of childcare or employment responsibilities; personal, physical or emotional health problems; lack of transportation; etc.</p>



Is the problem directly (e.g., not turning enrollment information in on time), indirectly (e.g., committee treasurer is charged with embezzling money from his/her place of employment), or not directly (e.g., convicted of food stamp fraud) related to the volunteer's volunteer responsibility?

Step 3: Collect relevant information pertaining to the situation

<p>Types of documentation:</p>	<p>Written</p> <p>-----</p> <p>Recorded observations and conversations by yourself or others with the individual volunteer or “related parties”; meeting minutes; financial/bank records; court records; lesson plans and/or handouts; attendance records; etc.</p> <p>“Third” party observations</p> <p>-----</p> <ul style="list-style-type: none"> • Ask them to provide written documentation. • Summarize comments made by the third party. • Summarize comments made by the third party and ask them to sign. <p>Past volunteer performance review information</p> <p>-----</p> <ul style="list-style-type: none"> • Volunteer “due process” • Legally versus Realistically • Generally the volunteer should be given the opportunity to share his/her side of the story before a decision is made.
<p>Documentation Strategies</p>	<ul style="list-style-type: none"> • Focus on the facts • Leave personal feelings, emotions, and judgments out of documentation • Take initial notes and summarize • Include date and time • Names of individuals involved • Don’t write something you would not want read in Court or in the newspaper • Have a 3rd party review

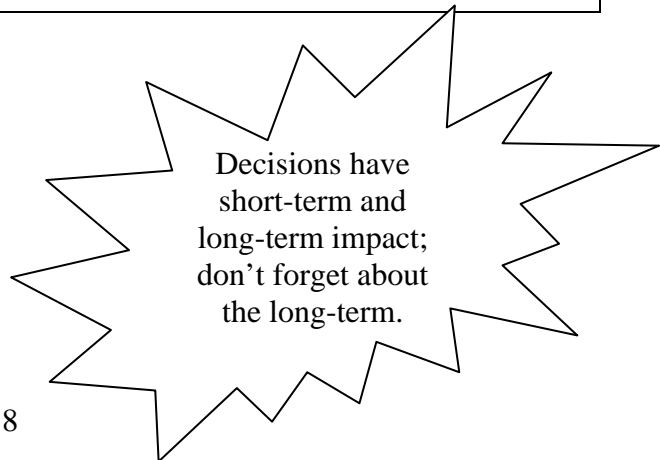


Don’t write something that you are not willing to explain and/or defend!

Step 4: Investigate potential options to bring resolution to the situation.

<p>Education</p>	<ul style="list-style-type: none"> • Conduct a one-on-one training of a specific task or responsibility with the volunteer. • Incorporate the topic into on-going volunteer training opportunities. • Include an educational segment in the monthly newsletter related to the topic/issue. • Promote and encourage the volunteer to attend a training program conducted by another organization. • Provide mentoring opportunity to pair volunteer with another volunteer who has the desired skills and/or abilities.
<p>Counsel (volunteer continues current responsibilities/contacts)</p>	<ul style="list-style-type: none"> • Directly address the concern/issue by focusing on the individuals' behavior not on the individual. • Keep the discussion focused on the issue and avoid being drawn in other directions. • Accomplished through verbal or written communications. • Recommend appropriate developmental opportunities.
<p>Probation (volunteer continues current responsibilities/contacts with limitations and/or guidelines)</p>	<ul style="list-style-type: none"> • Directly address the concern/issue by focusing on the individuals' behavior not the individual. • Mutually agree on a specific time for behavior/operation to change. • Agree to follow-up date(s) for further evaluation(s)/meeting(s). • Usually accomplished through a face-to-face meeting and is followed by written correspondence. • Recommend or require appropriate developmental opportunities.

<p>Suspension (volunteer discontinues all or selected responsibilities/contacts)</p>	<ul style="list-style-type: none"> • Utilized while gathering additional information or during a “third-party” investigation or disciplinary process. • There is immediate concern over safety of youth or others associated with the program. • Length of time is clearly communicated to the individual with written communication.
<p>Dismissal (volunteer discontinues all or selected responsibilities/contacts)</p>	<ul style="list-style-type: none"> • Utilized only when other techniques have been unsuccessful or when the behavior is severe. • Be able to articulate a reason or reason why the individual is being dismissed (utilize Volunteer Standards of Behavior) <p>Steps to consider:</p> <ul style="list-style-type: none"> • Face-to-face meeting with volunteer to discuss the situation • Follow up dismissal with a letter that specifically releases the individual of all or selected responsibilities • Written communication should be specific and to the point
<p>Consider</p>	<ul style="list-style-type: none"> • Impact on programs, organization, safety of clientele, and public relations • Seek assistance from supervisors and peers; consult direct supervisor(s)
<p>Note:</p>	<p>The authors, in their work with Ohio State University Extension do not consider this to be a progressive disciplinary process. At times, it is necessary to take immediate action (such as probation or dismissal) without having implemented one of the other options first.</p>



Step 5: Determine an appropriate course of action

<p>Considerations</p>	<ul style="list-style-type: none">• One of the following should be selected:<ul style="list-style-type: none">• No action necessary;• Education for the volunteer(s);• Counsel the volunteer(s);• Probation for the volunteer(s);• Suspend the volunteer(s); or• Dismiss the volunteer(s)• Follow organizational policies and procedures• Be consistent when dealing with inappropriate behaviors• Move ahead at an appropriate pace• Consider potentially libel situations and discuss with supervisor and legal counsel• Anticipate how the volunteer will react• Communicate with the volunteer and all appropriate people• Dealing with others (media, other volunteers, parents, youth, etc.)• Seek assistance from supervisors and peers
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Step 6: Evaluate and follow-up on the decision

Follow-Up	Once a decision has been made, communicated to the volunteer and implemented, it may occasionally be necessary to follow-up with the individual and/or evaluate the process and/or decision.
Appeals	<ul style="list-style-type: none">• Formal Appeal Process• Informal Appeal Process• No Appeal Process <p>Each organization must determine what type of appeal process is appropriate for their situation. Ohio State University Extension does not have an informal or formal appeal process for volunteers.</p>

Volunteer Dismissal Checklist

Prior To Making A Decision	Yes	No
Do you have the individual's volunteer application and signed Standards of Behavior?		
Have you allowed the volunteer to share his/her "side" of the issue?		
Have you considered other options for dealing with the volunteer?		
Making the Decision		
Did the volunteer have prior knowledge of the issue?		
Is the dismissal your last resort or is the behavior severe enough to warrant dismissal?		
Is this decision consistent with other volunteer dismissals?		
Have you reviewed organizational policies and procedures related to volunteer issues?		
Are you moving ahead at an appropriate pace?		
Documentation		
Have you carefully documented the situation?		
Does the documentation include the facts as you believe them to be true?		
Does the documentation describe the specific behaviors/actions that are inappropriate?		
Does the documentation include previous counseling sessions with the volunteer that related to the issue?		
Does the documentation support specific violations of the volunteer Standards of Behaviors?		
Do you have written documentation that supports the violation of the volunteer Standards of Behavior?		
Communicating the Decision		
Have you arranged for a private location to meet with the volunteer?		
Have you consulted with your peers and/or administrators?		
Have you considered who should know about the dismissal?		
Does a prepared statement need to be developed?		
Have you prepared a correspondence to the volunteer that clearly communicates their dismissal as a volunteer?		

* This does not represent Ohio State University Extension progressive disciplinary action or official procedure. This document is intended as a guide for use when dismissing current volunteers.

Documenting Behaviors and Actions

Don't Write

Volunteer was spaced out on something and acted weird.

Volunteer lacks real commitment and just wants that 40-year certificate.

The volunteer scheduled a 4-H Committee meeting (that the agent canceled) with blatant disregard for authority.

The 4-H members are afraid of volunteers.

The volunteer is an absolute liar.

Do Write

Volunteer could not focus on questions and asked that they be repeated three or four times.

Volunteer has not turned in club enrollment materials by the published deadline for the last two years.

Volunteer held only two club meetings last year when six are required.

Volunteer did not distribute certificates to members for the last three years.

The volunteer rescheduled the meeting without consulting with the Extension professional.

During the July club meeting the volunteer yelled at the 4-H members during a club meeting.

The volunteer stated that if members did not help with the project they would not get their fair passes.

After a county committee meeting, at which the volunteer was present, he/she returned to the club meeting and reported inaccurate information.

Volunteer stated that he/she did turn in the information by the deadline; however, three families stated the information was not collected until after the deadline.

Documenting Behaviors and Actions

Don't Write

The volunteer is only interested in the fair.

The volunteer stole money from the 4-H club account.

In a letter dismissing a volunteer:

“You were a valuable asset to the Ohio 4-H Youth Development program and provided a much needed service.”

In written or oral communication:

“If you do not return the money, we are going to sue you.”

Announcement to the 4-H committee:

“Our treasurer has been fired as we believe she took money from the organization and then lied about it.”

In written or oral communication:

“The potential volunteer for XYZ 4-H club was not accepted because all the people we contacted said that we should not take him/her as a volunteer”

Do Write

Under the volunteer’s leadership the secretary’s book indicated that only two club meetings were held during the year. The books also indicated that five members did not attend any meetings.

Volunteer did not have members purchase or complete any project or record book.

The volunteer collected the fund raising money from the members and was never deposited into the checking account. No receipts were available to document how the money was used.

The elected 10-year-old treasurer was not given a treasurer’s book to complete.

The volunteer filled in a treasurer’s book and asked the treasurers’ mother to sign the book to indicate that it had been audited.

Sample 4-H Non-Acceptance Letter

DATE

NAME

ADDRESS

CITY, STATE ZIP

Dear,

Thank you for your interest in becoming a volunteer with Ohio State University Extension, 4-H Youth Development in XXXXX County. After reviewing your application materials, we are unable to accept you as a volunteer with the O.S.U. Extension XXXXX county program at this time.

It is our intent to, in our selection process, to select individuals who possess the abilities and desires to: (1) assist others in developing skills, knowledge and abilities; (2) build positive relationships with youth members and/or adults involved in the 4-H Youth Development program; (3) promote teamwork with other individuals, groups, organizations and the community; and (4) serve as a positive representative of O.S.U. Extension programs.

Sincerely,

Extension Educator, 4-H Youth Development

cc: County Director

Sample Probation Letter

Date

NAME
ADDRESS
CITY, STATE ZIP

Dear

Thank you for taking the time to meet with me on [INSERT DATE] to discuss your potential volunteer involvement with the [INSERT] County 4-H Youth Development program. Based on information gained throughout the selection process, the decision has been made to accept you as a volunteer for a probationary period of [INSERT DATE].

Specifics of the probationary period include:

- (1) Your volunteer role in the [INSERT] County 4-H Youth Development program is initially limited to the [INSERT] 4-H Club. Potential involvement as a member of a county-wide specie or subject matter committee will be determined after the probationary period is completed.
- (2) You are to uphold the Ohio 4-H Volunteer Standards of Behavior and follow appropriate channels to address conflicts or concerns within the [INSERT] County 4-H Youth Development program.
- (3) At the conclusion of the probationary period, we will schedule a meeting to evaluate your recent volunteer experience to determine future involvement in the [INSERT] County 4-H Youth Development program.

During our conversation on [INSERT DATE] we discussed some ways in which past conflicts you encountered could have been handled more successfully. We also talked about appropriate language and actions when working with youth. At that time you indicated you understood and agreed that you needed to improve your communication and conflict management skills when working with youth and adults.

Once again, thank you for interviewing for a volunteer position in [INSERT] County 4-H. Please contact me if you have any questions regarding the terms of your volunteer acceptance.

Sincerely,

Extension Educator, 4-H Youth Development

cc: County Director

Sample Suspension Letter

Date

NAME

ADDRESS

CITY, STATE ZIP

Dear:

This letter is to inform you that your status as a volunteer with the XXXX County 4-H Youth Development program is being suspended as a result of current charges pending involving you. Your suspension is effective immediately, upon receipt of this letter, and will be in effect until the completion of all court and court related matters. When all matters are resolved, you may contact our office to discuss future involvement in the 4-H Youth Development program.

The suspension does not allow you to act in the capacity as a recognized 4-H volunteer at any event in the county, state or nationally. This includes, but is not limited to, your participation as a 4-H volunteer advisor in the following: (a) 4-H club meetings (including Cloverbuds); (b) county committees or activities; and (c) 4-H sponsored clinics, shows or workshops.

Please contact me directly should you have any questions concerning this correspondence.

Sincerely,

Extension Educator, 4-H Youth Development

cc: County Director

bcc: State 4-H Office; Regional Director

Sample Dismissal Letter

DATE

NAME

ADDRESS

CITY, STATE ZIP

Dear:

Thank you for taking the time to meet with me on [insert date] at the [insert county] County Extension office. Due to the nature of the situation the decision has been made to terminate your status as an Ohio State University Extension Master Gardener volunteer effectively immediately.

As a result of this decision, you are not permitted to act in the capacity of a recognized Ohio State University Extension volunteer at any event in the county or state. Please know that this includes the Master Gardener program as well as other Agricultural & Natural Resources, Family & Consumer Sciences, and 4-H Youth Development events and activities.

Should you have any questions regarding this decision, please feel free to contact me directly at [insert number].

Sincerely

Extension Educator, 4-H Youth Development

cc: County Director

bcc: State 4-H Office; Regional Director

Selected References:

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