

Training & Orientation

Achieving Service Excellence



Components of Volunteer Orientation

Cause: Introduces the volunteers to the mission and purpose of the organization.

Answers the question: “Why should I volunteer here?”

System: Introduces organizational structure and systems and situates the volunteer role within the organization as it relates to the mission of the organization

Answers the question: “How will I be volunteering here?”

Social: Introduces the volunteer to the social context/community they are being invited to join

Answers the question: “Where do I fit in?”

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Cause Orientation Worksheet

Write down a few key points about your organization for each category:

Mission and Values

Population Served

Important Organizational History

Key Programs & Services

Organizational Partners

Organizations Strategic Plans

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System Orientation Worksheet

Organizational Structure and Programs

Policies and Procedures

Facilities and Equipment (e.g., bathrooms, refrigerator, recycling)

Volunteer Benefits and Position Requirements

Record-keeping Requirements

Organizational Activities and Events



Social Orientation Worksheet

Organizational Leadership

Organizational Culture and Etiquette

Social Events

Organizational Activities and Events

Steps in Training Volunteers

STEP 1: Identify Training

STEP 2: Design Training

STEP 3: Deliver Training

STEP 4: Assess and Refine Training

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Step 1: Identify Training Needs

Every volunteer needs certain knowledge, skills and attitudes to perform their volunteer functions. Those that they need and don't already have can be developed through training.

Knowledge: Information.

Skills: Ability to perform tasks.

Attitude: The way one feels about something or the way one sees it.

Sample Position Description

1. Position Title	Youth Supervisor
2. Tasks	Supervise outdoor free time and, during structured activities, meet with youth who are not able to participate in group activities due to discipline or other problems
3. Hours & Times	3:00 – 5:00 p.m. at least one day per week between Monday and Thursday
4. Qualifications	Willing to work with youth, including at-risk youth
5. Benefits	Enjoy outdoors with youth, learn child development strategies from instructors, and develop deeply satisfying relationships with youth and staff

What knowledge, skills, and attitudes is a person in this position likely to need that they do not already have?

Knowledge:

Skills:

Attitude:



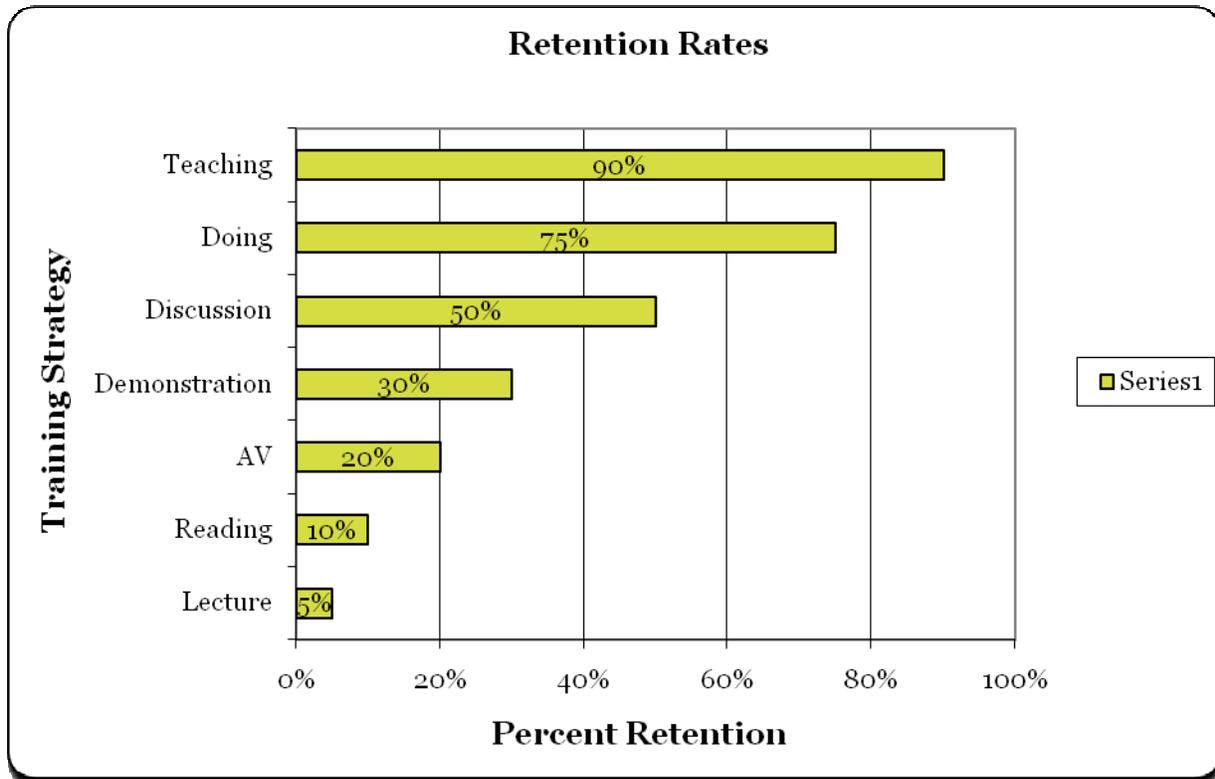
Step 2: Design Training

The last 100 years or so have generated a lot of information on how adults learn. This knowledge can be summarized and applied to volunteering through the Principles of Effective Volunteer Training Design, listed below. Overall, training provided to adults needs to be relevant, be rooted in experience, help to problem solve and demonstrate immediate value.

Principles of Effective Volunteer Training Design	Examples of Learning Activities
1. Build on participants' experience	<ul style="list-style-type: none"> • Facilitated discussion • Participant reflection / brainstorming • "War stories" • Other:
2. Make training experience interactive	<ul style="list-style-type: none"> • Group problem solving • Position shadowing • Small group work • Other:
3. Communicate through visual, auditory, and experiential modes	<ul style="list-style-type: none"> • Demonstrations • Skills practice • Flip chart • Video • Other:
4. Apply learning	<ul style="list-style-type: none"> • On-the-job training • Position shadowing • Skills practice • Other:



Training Strategies and Retention Rates





Volunteer Training Plan Worksheet

1. Volunteer position to which this training plan applies:		
2. Person completing this planning worksheet and date:		
3. Knowledge, skills, and attitudes (KSAs) that volunteer(s) in this position need, and whether organization will recruit volunteers with it, train for it, or both.	Recruit	Train
Knowledge		
Skills		
Attitude		



4. Training Design Detail

For each KSA, write an objective and design a learning activity that will help volunteers develop that knowledge, skill or attitude.

1	Objective (KSAs)	Format: <input type="checkbox"/> activity <input type="checkbox"/> game <input type="checkbox"/> worksheet <input type="checkbox"/> brainstorm <input type="checkbox"/> project <input type="checkbox"/> lecture <input type="checkbox"/> poll <input type="checkbox"/> role play <input type="checkbox"/> other:
	Learning Activity	
	Description	
	Materials	
2	Objective (KSAs)	Format: <input type="checkbox"/> activity <input type="checkbox"/> game <input type="checkbox"/> worksheet <input type="checkbox"/> brainstorm <input type="checkbox"/> project <input type="checkbox"/> lecture <input type="checkbox"/> poll <input type="checkbox"/> role play <input type="checkbox"/> other:
	Learning Activity	
	Description	
	Materials	
3	Objective (KSAs)	Format: <input type="checkbox"/> activity <input type="checkbox"/> game <input type="checkbox"/> worksheet <input type="checkbox"/> brainstorm <input type="checkbox"/> project <input type="checkbox"/> lecture <input type="checkbox"/> poll <input type="checkbox"/> role play <input type="checkbox"/> other:
	Learning Activity	
	Description	
	Materials	



e-Learning

Volunteers can be trained online. Not everything has to be in a classroom or office. e-Learning is happening in government offices, corporate cubicles and nonprofit organizations. Why not in your volunteer program?

What topics make for good online training? Things like organizational background or the history of the program, a policy review, service to clients and so much more (i.e., topics that take precious face-to-face training time and can be done in a different format.)

e-Learning should always include some method to assess that the learner has completed the course. It can be a quiz at the end of the learning module or it can be a workbook or notebook used in conjunction with your e-learning course.

Here are some tips to make your e-learning course work from the beginning.

- e-Learning is not posting handouts from a workshop. Training is not reading online. It is more and requires planning on your part to make it a substantive learning experience. This may require some reading and study on your part.
- The learning must be interactive. Volunteers need to be able to e-mail questions, observations or assignments to an instructor who can respond in a timely fashion.
- Start the program with a tutorial. Lead the volunteer learners into the course. If they practice, it will make completing the training session easier.
- Consider giving learners some of the material in a notebook or workbook. This combines the "familiar" form of learning with the new (and probably unfamiliar) one.
- Learners are much less computer literate than you think. Make no assumptions about what they know. Make sure instructions are clear and leave nothing to chance. For example, many workers have never "right-clicked" in their lives.
- Avoid download problems. Keep everything to less than five seconds for learners to access. Keep navigation very simple.
- Work with the information technology staff to connect students to each other. Share the e-mail of volunteers who are working on the course. They can learn from each other, and not just the instructor.
- Be aware that not all volunteers want this type of learning. For some it is a personal choice. For others it may be they have no access to the equipment necessary to do an online course.

(Source: Adapted from Nancy Macduff, as published in *Volunteer Today* -- <http://www.volunteertoday.com/Novtrain.html>)



Strategies for Managing Awkward Silences

At some point, every trainer experiences participants' total silence after posing a question. Although such silence is not necessarily a negative thing, it can be awkward for both trainer and participants. This is particularly true if it visibly frustrates the trainer. Below are some strategies for successfully managing such moments. Because such silence is usually the result of participants' confusion, uncertainty about their answer (they may need to think about it longer), discomfort with speaking in the large group, each strategy addresses all of these factors.

For Factual Questions

Provide the Answer. When the question is a factual one—such as “What is the mission of this organization?”—the best response to the prolonged silence is to simply provide the right answer without judgment. This is a good way to determine if you are covering material that is too basic or too advanced for participants.

For Opinion Questions

Facilitate Small Group Discussion. If your question is not a factual one and you have gotten no response for approximately ten seconds (note: this can feel like a very long time from the trainer perspective), you can instruct the group to discuss the question in pairs or small groups. Announce that you will write the question on the flip chart or overhead transparency and that they will have two minutes to think about the question, and ask them if they have any questions on the assignment. An example of this instruction is, “Take two minutes to discuss this question with a partner. I will write the question you are discussing on the flip chart. Any questions before we start?” At the completion of the two minutes, you can either invite participants to share or have each pair report out.

Facilitate Individual Thinking. If your question is not a factual one and you have gotten no response for approximately ten seconds (again, this can feel like a very long time from the trainer perspective), you can instruct participants to think about the question individually and write down their answer on piece of paper that you will read aloud. Announce that you will write the question on the flip chart or overhead transparency, and ask them to raise their hand if they have any questions so that you can come by and help them. An example of this strategy may sound like this: “Take a minute to think about this question and write your answer on a piece of scrap paper. When we are done, pass your responses up to the front and I will read them aloud. I will write the question you are answering on the flip chart. If you would like further guidance or assistance, raise your hand and I will come help you.”



Step 4: Evaluate and Refine

It's critical to assess to what degree the training has reached its objectives, in order to determine what else needs to be done to have volunteers perform their functions well and happily.

Ways to Collect Information

- Written participant evaluation
- Reflection exercise at end of training where participants share what they have learned and what else they need
- Participant check-in interview
- Participant performance in volunteer position
- Other:

Kirkpatrick's Four Levels of Evaluating Training

Donald Kirkpatrick created what is still one of the most widely used approaches to evaluating training, even though it was first developed in 1959. At the time, he was a professor of marketing at the University of Wisconsin. His four levels of evaluation are:

Level 1: Reaction

A measure of satisfaction. This level answers questions such as: "Were participants pleased? What do they plan to do with what they learned?"

Level 2: Learning

A measure of learning. This level answers questions such as: "What skills, knowledge, or attitudes have changed? By how much?"

Level 3: Behavior

A measure of behavior change. This level answers questions such as: "Did participants change their behavior based on what was learned in the program?"

Level 4: Results

A measure of results. This level answers questions such as: "Did the change in behavior positively affect the organization?"



Tips for Training Busy Staff to Work with Volunteers

By Betty Stallings

From *Training Busy Staff to Succeed with Volunteers: The 55-Minute Training Series*

The following are a few recommendations as you prepare to design and/or select your content:

1. Good training design begins with the assessment of the learning needs of anticipated participants. Your content should be built around the gap between what staff needs to know to be successful and what they already know.
2. After the topic(s) are chosen, it is important to specify key learning objectives that deal with knowledge, skills, and attitudes. Learning objectives basically describe what a participant should be able to know or do or feel at the conclusion of the seminar.
3. Select a moderate level of content. There is a tendency to throw in everything you know about a given topic, and the result is a rushed session where little is retained. The best approach to developing a lean curriculum is being selective - choosing the “need-to-know” before the “nice-to-know.” When the content level is kept moderate, the trainer can lead activities that experiment with and reflect upon what is being presented.
4. Provide printed resources that will be utilized and/or shared (e.g., handouts, activity sheets, training manuals for participants, in-house forms, information to be brought by participants). These resources greatly enhance learning if they are well done and tie closely to the presentation. If handouts are distributed and no acknowledgment is given to them, they are infrequently read or utilized.

A typical sequence for training is:

Beginning of training:

- Purpose of session
- Learning objectives and key concepts
- Climate setting, ice breakers

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Middle of training:

Content developed around key concepts, done in logical fashion and building from theory to application, knowledge to skill. Selected training activities/learning methods vary from passive to participant phases:

- Lectures
- Role play
- Slides
- Flip chart
- Group Dyad activities
- Panel discussions
- Brainstorming
- Case study
- Dramatization

Take occasional breaks and/or energizers if session lasts longer than 90 minutes.

End of training:

- Review and summarize content
- *Have participants process their experience ("What will I do differently when I return to my job?")
- Conduct an evaluation to get a sense of the perceived value of the session to the participants. True evaluation occurs if you can arrange a follow-up form whereby actual impact can be recorded. For example: "As a result of the workshop in interviewing, I now see its value and have arranged to give half-hour screening interviews to volunteer candidates in my department."

Excerpted from *Training Busy Staff to Succeed with Volunteers: The 55-Minute Training Series*, by Betty Stallings, 2006, Betty Stallings and Associates.

Found in the Energize Website library at: <http://www.energizeinc.com/art.html>



Resources

Energize Inc.

<http://www.energizeinc.com/art/subj/train.html>

National Resource Center – Corporation for National and Community Service

<http://nationalserviceresources.org/volunteer-member-staff-management/training>

<http://nationalserviceresources.org/volunteer-member-staff-management/orientation>

Free Management Library

<http://www.managementhelp.org/staffing/outsrcng/volnteer/volnteer.htm#anchor1269832>

Training Busy Staff to Succeed with Volunteers: The 55-Minute Staff Training Series

Betty Stallings <http://www.energizeinc.com/store/4-109-E-1>

References

Campbell, Katherine Noyes, and Susan J. Ellis. (1995). *The (Help!) I-Don't-Have-Enough-Time Guide to Volunteer Management*. Philadelphia, PA: Energize, Inc.

Connors, T. Daniels, ed. (2001). *The Nonprofit Handbook*. New York, NY: John Wiley and Sons.

Lee, Jarene Frances, with Julia M. Catagnus. (1998). *What We Learned (the Hard Way) About Supervising Volunteers: An Action Guide for Making Your Job Easier*. Philadelphia, PA: Energize, Inc.

Rick Lynch. (1980). *Training Volunteers: Using the Right Training Method*. in *Voluntary Action Leadership, Fall 1980*. Washington, DC: Points of Light Foundation.

McCurley, Steve H., and Rick Lynch. (2006). *Volunteer Management: Mobilizing All the Resources of the Community*. Downers Grove, IL: Heritage Arts Publishing.

McCurley, Steve H., and Sue Vineyard. (1986). *101 Ideas for Volunteer Programs*. Downers Grove, IL: Heritage Arts Publishing.

McCurley, Steve, and Sue Vineyard. (1986). *101 More Ideas for Volunteer Programs*. Downers Grove, IL: Heritage Arts Publishing.



Maximizing the Volunteer Experience

Peanut Butter and Jelly Activity

Scenarios for Guiding and Supporting a Volunteer with Completing Tasks

1 “Our mission is to provide nutritional support to needy families in the community. We expect 50 people to come for our services today. Your assignment is to prepare nutritious meals that will feed all of them, that will make them happy (so they’ll come back) while staying within our budget. I’ll leave you in charge of making sure that happens. Good luck. Let me know what, if anything, you need, and if you have any questions or problems.”

2 “The task for today is to make 100 peanut butter and jelly sandwiches and have them ready by noon. Good luck and let me know if you have any questions or problems.”

3 “What I’d like you to do is to place two knives, a loaf of bread, a jar of peanut butter, a jar of jelly and a box of sandwich bags here on the counter. Then do the same in four more spots along the counter. When you have completed this step, come back to me and I will give you the next step.”

4 “Here’s what we need you to do today: Set-up five stations along the kitchen counter, each with two knives, a jar of peanut butter a jar of jelly a loaf of bread and a box of sandwich bags. Then, working at one of the stations, take a slice of bread and spread approximately two tablespoons of peanut butter on it using one of the knives. Use the other knife to spread about one tablespoon of jelly on top of the peanut butter. Place another slice of bread on top of the jelly. Place the sandwich in a sandwich bag and fold over the flap and tuck it in. Continue until there are a total of 100 sandwiches. Let me know if you have any questions or problems.”

Supervision



Maximizing the Volunteer Experience

General Supervision Scenarios

<p>1. TOM is a young consultant who has volunteered for your agency a few times, primarily during large workdays. He approached you and offered his professional skills including strategic planning. He really wants to support your organization and feels he can do more by using his skills than his hands. How could you support him? What challenges do you see?</p>	<p>2. TONYA is a high school student looking to complete about 40 hours of community service. She is happy to help out in your office, but also mentions that she has a great understanding of social media and would be happy to launch a FaceBook page and Twitter account for your organization. Tonya seems very interested in this specific project and you have no doubt that she would do a good job for as long as she is volunteering with you. How could you encourage Tonya while still getting the in-office support you need? What challenges do you see?</p>
<p>3. JOHN wants to support your organization but is very busy and cannot always make it to your office when staff is available to supervise. He has offered to take work home with him and to stuff envelopes, or complete other simple projects, late at night. What sort of projects could you send home with him? What would you need to put in place to feel comfortable with this arrangement?</p>	<p>4. AMELIA has been volunteering for you for several years. Recently she has chosen to be less active in order to spend more time at home with her young children. She is very interested in returning to her volunteer positions but would like to bring her six- and eight-year old daughters with her. Up until now, your agency has only allowed volunteers over 16 years of age. Are there any projects you would consider safe for children of this age? What changes would have to be made and who would have to be involved to allow this?</p>



Dealing with Difficult Volunteers

Guidelines to follow when reprimanding a volunteer or giving constructive criticism:

- Don't wait and give several criticisms to a volunteer all at once. Focus your discussion on the one item that has been brought to your attention.
- Be specific. Give the volunteer examples of when they have acted in a way that is contrary to your expectations and the procedures set down for them during orientation.
- Remember that you are giving them feedback on specific actions. Do not comment on the volunteer's attitudes or motivations, but rather on his or her specific behavior.
- Put the reprimand in perspective. If the volunteer has been an asset in other areas in the past, remind them of that good performance and let them know you can still move forward in a positive manner.
- Set a time to once again meet and determine if the behavior has changed. This will give you an opportunity to give positive feedback if the volunteer has amended their actions or take further steps if they have not.

Source: McCurley, Steve and Sue Vineyard, *Handling Problem Volunteers* (Downers Grove: Heritage Arts) 1988.

Suggested ways to open the conversation:

- "I have something I'd like to discuss with you."
- "I would like to talk about what just happened. Do you have a few minutes?"
- "I think we have different perceptions about _____."
- "I'd like to see if we might reach a better understanding about _____."



Sample Volunteer Work Plan

Placement Goal:

To organize an after school enrichment program for children 6-12 years of age.

Objective 1:

Locate and secure a program site that meets specified criteria.

Action Steps:

1. Create a list of criteria for program site.
2. Get site criteria list approved by supervisor.
3. Identify prime locations based on criteria.
4. Develop a spreadsheet to identify benefits and drawbacks to each site. Get supervisor feedback to narrow options down to five potential sites.
5. Conduct site visits to further narrow down site options.
6. Meet with supervisor to make final decision.
7. Contact site.
8. Secure a signed Memorandum of Understanding (MOU).

Time Frame:

Site secured according to the standards of success before a specified date.

Supervision:

Supervised by John Doe. John Doe and volunteer will meet every Tuesday at 10 a.m. for project status updates.

Resources:

Telephone, Computer, Memorandum of Understanding



Resources

Recognition

100 Ways to Recognize Volunteers

<http://www.maineservicecommission.gov/docs/A.7.%20100%20Ways%20to%20Recognize%20Volunteers.pdf>

Volunteer Recognition Ideas

<http://www.energizeinc.com/ideas.html>

Volunteer Recognition – Energize Inc.

<http://www.energizeinc.com/art/subj/recogn.html>

139 Ways to say Thank You

http://www.fourh.purdue.edu/downloads/ext_ed/pdf/131and139.pdf

Supervision

Volunteer Supervision – Energize.Inc.

<http://www.energizeinc.com/art/subj/super.html>

Becoming a better Supervisor: A Resource Guide for Community Service Volunteers

<http://www.nationalserviceresources.org/becoming-supervisor>

Supervising Volunteers – Free Management Library

<http://managementhelp.org/staffing/outsrcng/volnteer/volnteer.htm#anchor1270094>

Volunteer Work Plan

Work Plan Library

<http://nationalserviceresources.org/star/workplan>

Diversity

Cultural Competence and Community Building - The Community Toolbox

<http://ctb.ku.edu/en/tablecontents/index.htm#h>

Difficult Volunteers

Terminate or Tolerate: Dealing with a Problem Volunteer

<http://srdc.msstate.edu/03mm/ppts/groff.pdf>

Supervision

Maximizing the Volunteer Experience



Giving and Providing Feedback

<http://4h.uwex.edu/resources/mgt/documents/GivingandProvidingFeedback.pdf>

A Few Pointers on the Unpleasant Topic of Firing Volunteers

<http://www.utexas.edu/lbj/rgk/serviceleader/leaders/firing.php>

Books and Articles

Marlene Caroselli, *Hiring & Firing: What Every Manager Needs to Know*, SkillPath Publications: Mission, KS. 1993.

Linda Graff, *By Definition: Policies for Volunteer Programs*; GRAFF AND ASSOCIATES: Dundas, CA. 1997.

Jarene Frances Lee and Julia M. Catagnus, *Supervising Volunteers: An Action Guide*, ENERGIZE Inc:Philadelphia, PA, 1999.

Marilyn MacKenzie, *Dealing with Difficult Volunteers*, VMSystems: Downers Grove, IL. 1998.

Steve McCurley and Sue Vineyard, *Handling Problem Volunteers*, VMSystems: Downers Grove, IL. 1998.

Evaluation



Improving Results Using Data & Feedback

Evaluating Stress Ball - Worksheet

Establish Criteria	Establish Standards	Measure Performance and Compare Against Standards	Integrate Evidence into Judgment of Worth
What are the criteria on which a stress ball should be judged (e.g., texture, color, aroma, squooshiness, etc.)?	How well should the stress ball perform on each of the criteria (what are your standards)? Develop a rating system.	Based on your criteria for a good stress ball, how well does each stress ball measure up against the standards you set?	Which stress ball is worth buying?
		A.	
		B.	
		C.	
		D.	
		A.	
		B.	
		C.	
		D.	

Adapted from Preskill & Russ-Eft, 2005, Building Evaluation Capacity: 72 Activities for Teaching and Training, Activity #3. Used with permission



Ten Steps to Evaluation

- 1. Convene an Evaluation Team:** How many people are needed? Who should be involved? What skills are needed? How often should the group meet?
- 2. Identify your Purpose:** Why you are conducting an evaluation and what decisions you want to make upon completion of the evaluation.
- 3. Connect Evaluation Efforts to Organizational Planning:** How does the evaluation connect with the organization's goals, objectives or tactics?
- 4. Identify/Allocate Resources:** What resources do you have to support the planning and implementation of the evaluation?
- 5. Identify Stakeholders:** Who will the final summary or report be written for? Who has an interest in the evaluation results?
- 6. Identify Audience:** Who are you evaluating and why?



7. Design your Evaluation:

- a. Determine the type of evaluation you will use. Process-based, goals-based and/or outcomes-based.
- b. Identify the information needed
- c. Identify evaluation method(s)
- d. Develop instrument
- e. Pilot or test

8. Conduct Evaluation: Collect the data as planned.

9. Analyze Results and Interpret Data: The data sorting, analyzing and interpretation process will vary based on the type of data you have collected.

10. Communicate Results: Report results to key stakeholders.



Stakeholder Priorities

Use the space below to document insights around the priorities of the following stakeholders.

Stakeholder	General Priorities	Notes
Board Member		
Clients/ Participants		
Community Member		
Executive Director		
Grantor/Funder		
Volunteer Manager		



Evaluation Types Worksheet

Scenario: The purpose of the Grand View Food Bank Volunteer Program is to coordinate the distribution of donated food to those in need, through the efforts of volunteers. This year the Grand View Food Bank created an organic community garden project whereby all the food cultivated in the garden would be given to at least 3,000 families throughout the year. They want to teach at least 500 families how to garden at home. They also want to increase the quality of life of at least 75 percent of their clients as reported using a well developed instrument.

1. What type of program evaluation would you use if you are trying to find out if in fact you provided healthy food from the organic garden to at least 3,000 families?

Answer:

2. What type of program evaluation would you use if you were trying to find out how families were finding out about the community garden project and what form of communication was most effective?

Answer:

3. What type of program evaluation would you use if you were trying to verify that 75 percent of the families served reported an increase in quality of life?

Answer:



Data Collection Methods

The grid below shows the pros and cons of various data collection methods, so that you can choose the method that best meets your needs.

	Questionnaires, Surveys, checklists	Interviews	Documentation Review	Observation	Focus Groups
Advantages					
Anonymous It's possible for evaluators not to know who the actual respondents are.	✓		✓		
Cost-effective Can collect data from many individuals with little administration time.	✓		✓		
Easily administered Data can be collected by relatively untrained individuals.	✓		✓		
Generalizable Data are representative of entire population, if sampled and collected correctly.	✓	✓		✓	
Quantitative Collects data that can easily be presented numerically.	✓	✓		✓	
Probing Follow-up questions can be asked, for greater depth.		✓			✓
Rich Collects emotions, subtleties, stories and reasoning.		✓			✓

✓ This method has this advantage.



Data Collection Methods

Method	Overall Purpose	Advantages	Challenges	Comments
Surveys/ Questionnaires	Use when you need to quickly and/or easily get lots of information from people in a non threatening way	<ul style="list-style-type: none">• Can complete anonymously• Inexpensive to administer• Easy to compare and analyze• Administer to many people• Can get lots of data• Many sample questionnaires already exist	<ul style="list-style-type: none">• Might not get careful feedback• Wording can bias volunteer's response• Are sometimes impersonal• May need sampling expert (surveys)• Doesn't get full story	<p>Surveys use data collection instruments, like questionnaires, to collect data from a sample of the relevant population, or from the entire population (a census). Surveys are used extensively in evaluation - perhaps overused - because of their flexibility to gather data on almost any issue. When done correctly, surveys are an efficient and accurate means of collecting data, but they can be difficult to construct, and may yield low participation (response rate). A low response rate hinders the reliability and validity of the information. The evaluator does not know if the non-respondents would have answered differently, so including a non-respondent analysis is often important to see who actually responded or not.</p>

 **Notes**

Evaluation



Improving Results Using Data & Feedback

Method	Overall Purpose	Advantages	Challenges	Comments
Interviews	Use when you want to fully understand someone's impressions or experiences, or learn more about their answers to questionnaires	<ul style="list-style-type: none">• Get full range and depth of information• Develops relationship with volunteer• Can be flexible with volunteer	<ul style="list-style-type: none">• Can take much time• Can be hard to analyze and compare• Can be costly• Interviewer can bias volunteer's responses	Interviews are essentially conversations between the evaluators and their respondents. An interview is selected when interpersonal contact is important, when opportunities for follow-up of interesting comments are desired, when the topic is complex and requires explanation and interaction, or when cultural, educational, or language barriers are present. The use of interviews as a data collection method assumes that the participants' perspectives are meaningful and knowable. The quality of information obtained is largely dependent on the interviewer's skills and personality.

 **Notes**

Evaluation



Improving Results Using Data & Feedback

Method	Overall Purpose	Advantages	Challenges	Comments
Documentation review (e.g. data already collected)	When you want an impression of how the program operates without interrupting the program. Includes review of applications, finances, memos, minutes, etc.	<ul style="list-style-type: none">• Get comprehensive and historical information• Doesn't interrupt program or volunteer's routine in program• Information already exists - few biases about information	<ul style="list-style-type: none">• Often takes much time• Information may be incomplete• Need to be quite clear about what looking for• inflexible means to get data; data restricted to what already exists	Documents are very handy in program evaluation. Existing (archival) records often provide insights that cannot be observed or noted in another way, if the documents are accessible and accurate. Examining records requires that the data collector have a very clear idea of what information is needed, because there will likely be plenty of other interesting information to distract the unorganized reviewer.

 **Notes**

Evaluation



Improving Results Using Data & Feedback

Method	Overall Purpose	Advantages	Challenges	Comments
Observation	Use to gather accurate information about how a program actually operates, particularly about processes	<ul style="list-style-type: none">• View operations of a program as they are actually occurring• Can adapt to events as they occur	<ul style="list-style-type: none">• Can be difficult to interpret seen behaviors• Can be complex to categorize observations• Can influence behaviors of program participants• Can be expensive	Observations can be useful in determining how the program is implemented and provides opportunities for identifying unanticipated outcomes. Observations can answer questions on whether or not the program is being delivered and operated as planned. By directly observing operations and activities, the evaluator can enter into and understand the situation and context. However, observation (obtrusive and unobtrusive) can be expensive and time consuming. Depending on the situation, the observer may need to be a content expert to accurately interpret the observations.

Notes

Evaluation



Improving Results Using Data & Feedback

Method	Overall Purpose	Advantages	Challenges	Comments
Focus groups	Use to explore a topic in depth through group discussion (e.g., about reactions to an experience or suggestion, understanding common complaints, etc.) Useful in evaluation and marketing	<ul style="list-style-type: none">• Quickly and reliably get common impressions• Can be efficient way to get much range and depth of information in short time• Can convey key information about programs	<ul style="list-style-type: none">• Can be hard to analyze responses• Need good facilitator for safety and closure• Difficult to schedule 6-8 people together	Groups (such as focus groups) combine elements of both observation and interviewing. A focus group is an interview with a gathering of 8 - 12 people, but uses group interaction to generate data and insights that would be unlikely to emerge in individual interviews. The technique includes observation of group dynamics, and insights into the respondents' behaviors and attitudes. Originally used as a market research tool to learn the appeal of various products, the focus group method has been adopted by other fields as a way to gather data on a given topic.

 **Notes**



Resources

Evaluation Methods

Focus Groups

Australian Museum. *How do I conduct a focus group?*

<http://australianmuseum.net.au/How-do-I-conduct-a-focus-group>

McNamara, Carter. 2008. *Basics of Conducting Focus Groups*.

<http://managementhelp.org/evaluatn/focusgrp.htm>

Rennekamp, Roger and Martha Nall. *Using Focus Groups in Program*

Development and Evaluation. <http://www.ca.uky.edu/Agpsd/focus.pdf>

Interviews

Kiernan, Nancy Ellen (2002). *Volunteer Interviewers in a Phone Interview:*

What To Consider. Tipsheet #65, University Park, PA: Penn State Cooperative

Extension. <http://www.extension.psu.edu/evaluation/pdf/TS65.pdf>

Carolyn Boyce, Carolyn and Palena Neale. 2006. A Guide for Designing and
Conducting In-Depth Interviews for Evaluation Input

http://www.pathfind.org/site/DocServer/m_e_tool_series_indepth_interviews.pdf?docID=6301

Observation

Evaluation Trust. *Observation as an Evaluation Technique*.

<http://www.evaluationtrust.org/tools/observe>

Using Direct Observation Techniques

http://pdf.usaid.gov/pdf_docs/PNABY208.pdf



Portfolio/Journal Assessment

Teacher Vision. Portfolios.

<http://www.teachervision.fen.com/assessment/teaching-methods/20153.html>

Writing Survey Questions

Conducting a Survey in Your Community. A 9-step online guide

<http://www.communitydevelopment.uiuc.edu/commsurvey/>

Conducting Surveys. The Community Tool Box. Gives explanations, examples, related topics, tools and checklists.

http://ctb.ku.edu/en/tablecontents/section_1048.htm

***Creating Good Interview and Survey Questions.* Gives examples of poorly worded questions and revised questions.

<http://owl.english.purdue.edu/owl/resource/559/06/>

Evaluation Handbook. W.K. Kellogg Foundation. Though written for grantees, it is an excellent reference handbook.

<http://www.wkkf.org/~media/10BF675E6D0C4340AE8B038F5080CBFC.ashx>

***Resource Center.* Zoomerang. Various webinars, articles, response rates, tips, and whitepapers to help build better surveys.

<http://www.zoomerang.com/resource-center/>

***Smart Survey Design,* Survey Monkey. A 35-page guide that includes good vs. bad questions, question intent, relevancy, etc.

<http://s3.amazonaws.com/SurveyMonkeyFiles/SmartSurvey.pdf>

Survey Design. Survey System.

Sections on Establish the goals of the project, Determine your sample, Choose interviewing methodology, Create your questionnaire, Pre-test the questionnaire

<http://www.surveysystem.com/sdesign.htm>

Wikipedia.

Statistical survey. Describes standardization, advantages and disadvantages of surveys, questions and response formats, modes of data collection, methods to include response rates. http://en.wikipedia.org/wiki/Statistical_survey

Questionnaire construction. Describes issues, types of questions, sequencing.

http://en.wikipedia.org/wiki/Questionnaire_construction



Online Survey

SurveyMonkey - www.surveymonkey.com/ free for 10 questions, 100 responses. Paid subscriptions available.

Zoomerang - www.zoomerang.com/ Free for 30 questions, 100 responses. Paid subscriptions available.

Infopoll - <http://www.infopoll.com> 50% academic and non-profit discounts

SuperSurvey - <http://www.supersurvey.com/> Basic free plan. Paid subscriptions available.

Esurveys - <http://www.esurveys.com/> \$12-\$36/month.

General

Introduction to Evaluation

http://ctb.ku.edu/en/tablecontents/chapter_1036.htm



Scenarios

1. School Volunteer Program

Evaluation Team:

Teachers/parents who have an interest in the project; a parent who has professional evaluation skills

Purpose for Evaluation:

To demonstrate the value of the school volunteer program. Parents and community members help in the office, on the playground and in classrooms.

Organization's Plan:

The school is rooted in community involvement. There are several goals around visibility in the community, involvement of parents, etc.

Stakeholders:

- Parents – The ones who volunteer are dedicated to their cause and want to show all benefits and more
- Principal – Show how important the program is, especially since dollars are tight
- Parent's organization (PTO) – Ways they can engage more volunteers
- Some Teachers – Some want additional help from parents; others think parents are more trouble than what they contribute

Things to keep in mind:

Parents: Many want to be involved; others just want to keep informed
Principal wants to review all materials before they become public.

Questions:

1. Who are you evaluating? Who is your audience? Why?

2. What type of evaluation could you use? Why?



3. What type of information do you need? Can this be captured through quantitative and/or qualitative data?

4. What is your preferred evaluation method? Why?

2. Park Clean Up

Evaluation Team:

The executive of a small community nonprofit and a part-time volunteer who serves as a receptionist.

Purpose for Evaluation:

Demonstrate and celebrate a successful event. Determine if community residents will increase their exercise, since they have a park to use.

Organization's Plan:

Limited. The project fits within the mission of the organization and is listed on a work plan but evaluation was not originally in the plan and has been added later by the executive director.

Stakeholders:

- Community members – want to see positive change in their community. They will be watching from the sidelines.
- Supervisor for court-ordered community service program – well-informed, supervision, no violence/violations of parolees.

Evaluation



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Questions:

1. Who are you evaluating? Who is your audience? Why?

2. What type of evaluation could you use? Why?

3. What type of information do you need? Can this be captured through quantitative and/or qualitative data?

4. What is your preferred evaluation method? Why?



3. Legal Advice

Evaluation Team:

A staff member from the local community resource center, who is skilled in evaluation

Purpose for Evaluation:

Justify the lawyers' pro bono work in the community.

Determine the difference this program has on the clients who use the service.

Organization's Plan:

There is no work plan, but the partners want to use this as a marketing strategy – community involvement. One partner wants to show the impact of the program.

Stakeholders:

- Partners
- Perhaps the individual lawyers and their motivations for being involved in the program.

Things to Keep in Mind:

Partners would like you to review the key milestones with them as well as view the final report

Questions:

1. Who are you evaluating? Who is your audience? Why?

2. What type of evaluation could you use? Why?



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3. What type of information do you need? Can this be captured through quantitative and/or qualitative data?

4. What is your preferred evaluation method? Why?

4. Theater

Evaluation Team:

The volunteer coordinator, the executive director and a consultant

Purpose for Evaluation:

Would like to evaluate to identify areas for continued improvement as well as confirm that volunteers' needs are being met.

Organization's Plan:

The volunteer program is integrated throughout the work plan.

Stakeholders:

- Board – interested in effectiveness of program, satisfaction of volunteers
- Funders – interested to see if their funds can go further with more volunteers
- Volunteers – interested in possible improvements to the program

Things to Keep in Mind:

- Board – Would only like to view the final report
- Volunteers – Many are very dedicated to the organization and expect to be involved
- Funders – Would like a summary in their next quarterly report

Evaluation



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Questions:

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2. What type of evaluation could you use? Why?

3. What type of information do you need? Can this be captured through quantitative and/or qualitative data?

4. What is your preferred evaluation method? Why?
