Page Symbols

In the upper right-hand corner of each page is a symbol which indicates the function of that page as follows:

- **Objectives & Planning** – pages that either tell where we’re going or provide an opportunity for you to plan where you’re going

- **Activity** – a discussion or other participatory activity, often in small groups – pages that give instructions or needed materials or space for taking notes

- **Take Notes** – pages for taking notes on presentations/discussions

- **Inspiration** – quotes or activities included to inspire or recharge you in doing your work

- **Going Deeper (Enhancing Your Learning)** – pages for use after the training which provide opportunities for you to continue your learning or apply it to your own program

- **Resource** – additional reading for after the training to provide a deeper or broader understanding of the material

- **Summary** – pages which provide summaries of presentations/discussions during the training, to help refresh your memory afterwards
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Welcome and Introductions
Learning Objectives

At the completion of this module, participants will be able to:

• Identify the core personal values that inform their work;

• Identify which of their expectations will be met and how during the course of the workshop;

• Participate actively in the workshop in a manner that creates a valuable learning experience for everyone;

• Continue building a learning community of peers to enable the sharing of knowledge and resources;

• Continue to explore the values underlying service as well as ways to put them into practice on a day-to-day basis.
Workshop Goals

• Identify and explore core values that bring meaning to your work.

• Improve volunteer retention and quality of service by enhancing your effectiveness in:
  • Developing a vibrant volunteer program based in a foundation of core values
  • Building quality relationships among volunteers, staff, and clients
  • Implementing appropriate programmatic structures, processes, and policies based in your core values
  • Screening, training, and supporting/supervising volunteers.

• Enrich your work as volunteer managers through self-reflection and creating a community of colleagues.

• Identify changes you wish to make and plan next steps for yourself and your program.
Welcome & Introductions

Agenda
Day One

8:30 - 9:00  Continental breakfast

9:00 - 12:30  Welcome and Introductions
            Break
            Sharing and Exploring Your Program
            Break
            Overview of the SNTI Model
            Reflection #1

12:30 - 1:45  Lunch

1:45 - 4:30  Applying the SNTI Model to Volunteer Manager-Volunteer Relationships
            Break
            Screening Potential Volunteers
            Reflection #2 and Closing Circle
Agenda
Day Two

8:30 - 9:00  Continental breakfast
9:00 - 12:30 Training Volunteers
           Break
           Supporting and Supervising Volunteers
           Reflection #3
12:30 - 1:45 Lunch
1:45 - 4:30  Integration and Application
           Break
           Action Planning
           Peer Consultation Groups
           Closing Circle
Workshop Guidelines

Keep confidentiality.

Be on time.

Take responsibility for your own learning.

Listen, speak, and act from the heart.

Respect our differences.

Experiment with new ideas.

Have fun!
The Values Underlying Being of Service

Tapestry Activity

If you wish, record the value each person brings to being of service on the blank lines below, creating a reminder of this experience to inspire you after the workshop.
The Values Underlying Being of Service

Tapestry Activity Discussion Notes

What was it like to create this tapestry with the group? What does it represent to you?

What thoughts or feelings come up as you look at our tapestry?

How does it feel to be part of this group, having this discussion right now?

How do the tapestry and the experience of creating it relate to your work?
Welcome and Introductions

Additional Resources and Activities
The Values Underlying Being of Service

Tapestry Activity

Summary of Key Points

- The tapestry is an image of what "being of service" means to us as a group. It represents the beauty and complexity of what happens when people come together to be of service. It is the fabric of the work we do in being of service to others.

- The tapestry identifies the values that give meaning to our work – the work of both leaders of volunteers and volunteers.

- Basing the work we do on these values which give it meaning becomes a way to sustain and nurture ourselves and the volunteers we work with. It helps us renew our energy, get through a tough day, regenerate ourselves after a crisis.

- Talking explicitly about the meaning of being of service and the values underlying it is uplifting and inspiring. It builds community, and can be an important source of bonding and motivation for volunteers.

- You put these values into practice on a day-to-day basis in the ways you build relationships with volunteers and the program procedures and policies you use.

- You then create a rewarding, satisfying experience for volunteers because it is respectful, empathetic, honors differences, and truly values volunteers.

- When volunteers are having this kind of experience, service can happen at its best and volunteers are much more likely to stay over time.
Values Underlying Your Program
Reflection/Assessment

What are the values underlying your volunteer program? What does it mean to "be of service" in the context of your program?

Would your volunteers list the same values? How would they describe what it means to be of service in the context of your program? Have you ever discussed these issues with volunteers?

How do you make these values explicit in your day-to-day work and relationships with volunteers and others? How do you put them into practice?

How do you tap into these values as a source of inspiration and renewal for yourself?

How do you support volunteers in tapping into these values as a source of inspiration and renewal?
Sharing and Exploring Your Program
Learning Objectives

At the completion of this module, participants will be able to:

- Continue building community by sharing information about each others' programs and recognizing common strengths and challenges;

- Describe the experience they are currently creating and the experience they want to create for volunteers;

- Identify areas where the current/desired experience already match, and areas where there is a gap.
Volunteer Program Snapshots

Instructions

Purposes:  
(1) To expand your own options by learning about other volunteer programs

(2) To continue building community among the group by sharing information about the programs represented.

Task:  
(1) Make a "program snapshot" by putting the following information on a piece of flipchart paper and then posting it:

- Your name
- Name of your agency/organization/volunteer program
- Brief statement of your program’s purpose and population served
- Nature of services provided by volunteer staff (if not reflected in purpose)
- Number of volunteer staff
- Time commitment expected of volunteer staff (hours/week or month; for a minimum of ___)
- Number/percent time of volunteer management staff
- Experience of volunteer management staff
- Program budget

You will have 10 minutes to complete your snapshot. If you are here with a colleague from your program, please work together.

(2) "Gallery review" -- After you have posted your snapshot, you will have 5 minutes to briefly review the other programs. The snapshots will remain posted throughout the training, so there will be other opportunities to review them on breaks.
**Program Variables and Their Effects:**

**Gallery Review Notes**

<table>
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<th>Program Variable</th>
<th>Effect(s) on Program /Volunteers</th>
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A Volunteer Perspective on Your Program: Reflection on Visualization

What was it like for you to imagine being a volunteer in your program? What feelings came up?

From the viewpoint of the volunteer, what are the strengths and rewards of your program?

From the viewpoint of the volunteer, how could the experience your program provides be even more rewarding and desirable?
Clarifying Current and Desired Volunteer Experiences

Small Group Instructions

**PURPOSE:**  
(1) To expand new insights and perspectives you’re gaining by sharing learnings with a small group of colleagues.

**TASK:**  
(1) Share anything you wish from your reflection on the visualization (the three questions on the previous page).  
(2) Make two lists as a group:  
• list one is the rewards/strengths of your volunteers’ experience  
• list two is questions about enhancing the quality of your volunteers’ experience

**PROCESS:**  
(1) Each subgroup should choose a reporter to record and share your two lists with the whole circle. The following page has space for your notes.  
(2) You’ll have 15 minutes for this discussion.

**REPORTS:**  
(1) Each subgroup will report 2 or 3 key items from each of your lists.
Clarifying Current and Desired Volunteer Experiences

Small Group Discussion Notes

**List One**
Rewards of Current Volunteer Experience

**List Two**
Questions about Enhancing Volunteer Experience
Sharing and Exploring Your Program

Additional Resources and Activities
Invitations to Stay/Go

Invitations to Stay: Why Volunteers Continue to Volunteer

- Relationship with clients.
- Relationship with you (based on mutual respect, positive regard, empathy)
- Connection to other volunteers, sense of belonging (through support and supervision structure, working as a team)
- View volunteer work as a source of personal and spiritual growth (communication style, values, service, etc.).
- View volunteer work as a source of professional growth.
- Self-esteem and sense of connection to a mission or cause, values larger than themselves.
- Feel valued by the organization, know they're making a difference.
- Are offered opportunities to increase their skills and take on new roles and responsibilities.
- Your organization has good relations and reputation in the larger community, so the volunteer is pleased to be associated with you.
- Competent, caring management (e.g., you return their phone calls)

Invitations to Go: Why Volunteers Discontinue

- Unsatisfactory experience with client, volunteer manager, or other volunteers.
- One or more client matches that don't work well (caused by a bad match, poor training and emotional preparation, personality conflicts, unsuitability of volunteer in some way, inadequate support for setting boundaries)
- Difficulties in support group (caused by disruptive member, poor group leadership such as bad time management, unfocused meetings, personality differences or conflicts within the group; volunteers' resistance to support group; diversity issues within group).
- Volunteer feels poorly treated by others in the organization (other staff relating poorly to volunteers) or that volunteers are not valued (poor volunteer appreciation efforts, etc.).
- Volunteer is not adequately prepared in training for situations she/he encounters and does not experience the work as fulfilling because of lack of skills, lack of confidence, lack of support and supervision.
- Volunteer feels unsupported, not liked or appreciated by volunteer manager (not returning phone calls is certain to cause problems).
- Volunteer feels organizational structure and/or policies are too rigid.
- Volunteer unable or unwilling to follow policies and is asked to leave. (Perhaps a function of poor training/unclear boundaries/poor supervision; unsuitable volunteer chosen/accepted; personal predisposition).
- Volunteer experiences a life change (new job, relationship, illness, new interests, moving).
Strategies for Volunteer Retention

- **Valuing the contributions of volunteers** at all levels of the organization. This attitude should be consistently evident in all activities involving volunteers and in how staff interacts with volunteers.

- **Creating community.** The desire to belong to a group with whom we share values, vision, or mission is at the heart of many volunteers' motivation. Meeting this need to connect with others in community is an important component of volunteer retention.

- **Using the peer model** as a basic model of communication between individuals, within groups of volunteers, and between volunteer manager and volunteers. The peer model promotes open, honest communication, good listening skills, and mutual respect, thereby making connections to others more likely.

- **Screening and interviewing volunteers** ensures that the volunteers we invite into our programs and into the lives of our clients will be able to offer high quality service to clients and will, themselves, be served by the volunteer experience.

- **Preparing volunteers for fulfilling relationships with clients.** One of the most important reasons volunteers continue their work is their relationship with their clients. For many volunteers this is the most powerful reward for the work they do.

- **Providing excellent training.** Training prepares volunteers for the work they will do. The training process can result in a strong sense of community in a volunteer program. Each of these factors affects volunteer retention.

- **Supporting and supervising volunteer/client relationships well, so that they are smooth and mutually beneficial.** Without an excellent support system, volunteers cannot sustain their work for long periods, regardless of how carefully they are screened or how well they are trained.

- **Creating effective relationships with the volunteers you supervise.** Your relationships with volunteers can be either a clear invitation to stay or an invitation to go.
Experiences of Other Stakeholders

Reflection Instructions

In addition to reflecting on the experience you want to create for volunteers, it can be extremely useful to consider the nature of the experience you want your program to create for all your potential stakeholders, including:

- yourself as the volunteer manager
- the people your agency/program serves
- your agency as a whole (how does your program contribute to the well-being of your agency?)
- other staff in your agency/program
- funders/donors.
- the community at large
- others unique to your program.

Creating a vision of the experiences you want these people to have and reflecting on the experience they’re currently having can provide valuable insights into enhancing the quality of your program.

The worksheet on the following page provides a series of questions to help you think through the current and desired experiences of any of these stakeholders who seem relevant to your program. Describe the experience you’re currently creating in the "current" column, and the experience you want to create in the "desired" column. You may make as many copies of the worksheet as you like

This experience can be enriched by engaging in conversations with any of these stakeholders about the rewards and frustrations they currently experience in interacting with your program, and what they’d like to see happening.
Experiences of Other Stakeholders
Reflection Worksheet

Experience of ___________________________ (TYPE OF STAKEHOLDER)

What does this stakeholder need or want from you/your program?

What do you/your program need or want from this stakeholder?

What is the nature and quality of the experience you/your program creates with this stakeholder?

How does this stakeholder benefit from their experience with your program?

How do you benefit from your experience with this stakeholder?
Experiences of Other Stakeholders

Reflection Worksheet

Experience of ____________________________
(TYPE OF STAKEHOLDER)

Look back over your "current" and "desired" lists and circle the items where your current and desired experiences already match. How can you build on these strengths to enhance the experience you create for this stakeholder?

Look back over your "current" and "desired" lists at the items that are not circled. These are gaps between the two experiences, where your current experience does not yet match the desired experience.

Which of these gaps might have the greatest impact on the experience you're creating for this stakeholder?

What steps can you take to narrow the gap and move closer to your desired experience in these areas?
Overview of the SNTI Model of Volunteer Management
Learning Objectives

At the completion of this module, participants will be able to:

• Begin to identify interrelationships among values, relationships, and structures in enhancing quality of their volunteer program and the experience they create for volunteers.

• Begin to identify interrelationships among the four structural aspects of the SNTI model.

• Apply/adapt the philosophy and skills of the PSM to creating quality relationships in their own programs.

• Identify key principles of volunteer motivation and management.

• Be inspired to explore relevance and applicability of the SNTI model in creating the experience they want volunteers to have in their programs.
Overview of the SNTI Model

SNTI Model of Volunteer Management

Valuing the Volunteer

Retention
Invitation to Stay

Screening
Invitation to Belong

Empathy
Generosity

Training
Invitation to Grow

Support & Supervision

Creating Quality Relationships

Creating Community

"In the Spirit of Service" Participant Manual

Shanti National Training Institute

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Overview of the SNTI Model

SNTI Model of Volunteer Management

Values
Overview of the SNTI Model

SNTI Model of Volunteer Management

Quality Relationships Using the Shanti Model of Peer Support
Overview of the SNTI Model

SNTI Model of Volunteer Management Structures
Aspects of Quality Relationships
Demonstration

As you watch the demonstration, make any notes you'd like on the following:

• What is it like for you to watch the conversation?

• When did the conversation seem most supportive or connected to you?

• Were there any moments when the conversation seemed less than supportive? What seemed to be happening?

• What core aspects of a quality relationship were reflected in this supportive conversation for you?
Overview of the SNTI Model

Shanti Model of Peer Support

Primary Activities

Listen from the heart

Speak from the heart

Act from the heart in service to another person

"We do not serve the weak or the broken. What we serve is the wholeness in each other and the wholeness in life. The part in you that I serve is the same part that is strengthened in me when I serve. Unlike helping or fixing and rescuing, service is mutual.

There are many ways to serve and to strengthen the life around us: through friendship or parenthood or work, by kindness, by compassion, by generosity of acceptance. Through our philanthropy, our example, our encouragement, our active participation, our belief. No matter how we do this, our service will bless us."

Overview of the SNTI Model

Shanti Model of Peer Support

Underlying Values

Mutual respect

Positive regard

Genuineness

"The best caregivers are those who come to the work because they have been touched by the soul of another human being."

Acceptance of differences

"After four years of serving on the Shanti laundry team, I look forward to the way a client's face lights up when we hand him his clean clothes. Touching lives, more than just T-shirts, is what makes volunteering at Shanti a touchstone for me."

Empathy

Intention to be of service
Overview of the SNTI Model

Using the
Shanti Model of Peer Support
Between Volunteer Manager and Volunteers

Discussion Notes

How did you feel listening to this conversation?

How do you think the volunteer felt about this conversation?

How do you think the volunteer manager felt about this conversation?

How were the elements of the peer support model reflected in this conversation?

What would it be like for you to have a conversation with a volunteer, using the peer support model?
SNTI Model
Summary of Key Principles

- Focused on enhancing retention—keeping volunteers—and quality of service.

- Values-based, to create a rewarding experience for volunteers
  - Valuing volunteers
  - Being of service, including serving volunteers
  - Creating community
  - Creating opportunities for emotional/spiritual growth.

- Creating quality relationships using the Shanti Model of Peer Support.

- Developing appropriate structures (policies, procedures, materials) for retaining, screening, training, and supporting/supervising volunteers.

- Three-dimensional—interacting key components all affect each other.
Application of the SNTI Model to Your Program

Discussion

**Purpose:** To explore how the SNTI model—including the values base, the use of the PSM to build quality relationships, and the structural aspects—might be relevant or not in helping you create the experience you want volunteers in your program to have.

**Task:** Quickly brainstorm two lists:
- Ways the SNTI model seems useful or relevant to your program and the experience you want to create for volunteers
- Questions or concerns you have about how it might apply to your program

**Process:** Take about 5 minutes to quickly brainstorm your two lists with two people sitting near you. If you're with a colleague, you can decide whether it would be most useful for you to pair up or to have different partners.

**Reports:** There will be no formal reports, but we'll invite you to share some of the applications and questions you're beginning to raise so we can continue to explore them throughout our remaining time together.
Overview of the SNTI Model

Additional Resources and Activities
Applying the Shanti Model of Peer Support
The Nature of Volunteer-Client Relationships

If your volunteers provide direct services to clients, this worksheet will help you reflect on the nature of the relationship you want them to create and to assess the current nature of that relationship. If your volunteers do not have direct interaction with clients, you may find the worksheet on volunteer manager-volunteer relationships to be more useful.

At Shanti, the volunteer-client relationship is at the heart of our program for two reasons. First, it is this relationship that is one of the primary services we provide to our clients. Second, it is this relationship that provides our volunteers with much of the reward they get for volunteering. Being very clear about the nature of the relationship we want to encourage between volunteers and clients and supporting them in creating it therefore helps to create the satisfying experience we want volunteers to have. It enhances volunteer retention and quality of service.

• What is the nature of the work your volunteers do? What direct interaction do they have with clients?

• What are the values you want your volunteer-client relationships to reflect?
Applying the Shanti Model of Peer Support
The Nature of Volunteer-Client Relationships
Page 2

• How do you see these values currently reflected in behavior (e.g., what examples can you give of how these relationships reflect the values you’ve listed above)?

• What behavior do you see in volunteer-client relationships that do not reflect these values?

• If there is a discrepancy between the nature of relationship you desire and the actual, what steps can you take to encourage a shift toward the desired values?

• How can you incorporate volunteer and client input into that process?
Applying the Shanti Model of Peer Support
The Nature of Volunteer Manager-Volunteer Relationships

Page 1

The Shanti Model of Peer Support is also a powerful tool for volunteer managers to use in building quality relationships with volunteers. Effective use of the model provides much of the support that volunteers need to continue doing their work. It also sets a standard for effective use of the model in volunteers' relationships with clients or anyone else they interact with. So when you use the model in supporting and supervising volunteers, you are enhancing both volunteer retention and quality of services to clients. The questions below are designed to help you clarify the appropriate uses of the Shanti model of peer support in your own program.

- What is the nature of the relationships you as volunteer manager want to have with volunteers? What are the values you want your relationships with them to reflect?

- In what ways do your relationships with volunteers already reflect the values listed above?

- How do you already listen, speak, and act from the heart in your relationships with volunteers?
Applying the Shanti Model of Peer Support

The Nature of Volunteer Manager-Volunteer Relationships

Page 2

- What would it be like for you to use the Shanti Model of Peer Support to deepen or further enhance the quality of your relationships with volunteers?

- What qualities do you bring to these relationships?

- What qualities do volunteers bring to these relationships?

- How might volunteers benefit from your using the model to support them? How might you benefit?

- What do you need to do to make using the Shanti model of peer support an ongoing part of building quality relationships in your program?
Key Principles
Page 1

When a volunteer program creates a rewarding, satisfying experience for volunteers, clients receive top-quality service, volunteers are retained over time, and the agency receives a variety of community relations benefits as a result. Over our nearly three decades of experience, Shanti has tried out a variety of methods and approaches for training and managing volunteers. We have extracted the following principles of effective volunteer management. After you've read this summary key, you may want to make some notes on ways you're already addressing each principle and other ways to address it.

1. Being of service to others is a deep desire of many volunteers. They want to help, to make a difference, to give back to their community. They want to experience the rewards of serving others. Your program meets this need just by offering volunteer opportunities.

In addition, you can do a variety of things to help ensure that volunteers have the experience of service that they want. For example:
- careful screening and matching help to ensure that the nature of the work will be rewarding to the volunteer.
- quality training helps prepare volunteers for their work and enables them to explore the nature and rewards of the service they'll be providing.
- developing relationships and structures based in your core values helps to ensure that the service experience is rewarding for volunteers.

2. Building community is an important way for your program to respond to another deep desire many volunteers bring to their work -- the desire for connection to others and participation in the larger community. They may be looking for social connections, or want to "get out of the house." They may have a commitment to a particular cause out of some personal experience—people who mentor children because a mentor was influential in their own childhood, or someone who volunteers for a health organization because of personal experience with an illness. Wanting to belong in some way is an important need for many volunteers, and building community helps to create the experience you want volunteers to have.
Creating community among volunteers, clients, and staff as appropriate can be accomplished in the following ways:

- Using a variety of activities in volunteer training which involve participants in getting to know each and learning from each other.
- Using peer support groups as part of your support and supervision strategy so volunteers mentor and support each other.
- Creating opportunities for volunteers to tell their stories.

3. **Addressing the emotional and spiritual lives of volunteers** is another way to help create the experience you want for them. Volunteers often come to a program looking for opportunities to stretch themselves personally or spiritually, to grow as a person, or to learn new skills. When their volunteer service is a source of new learnings they can apply in other areas of their lives, they are likely to feel deeply rewarded for their work. So offering this gift to volunteers is a valuable way to enhance retention and quality of service.

Some ways to address the emotional and spiritual lives of volunteers are:

- providing experiences in training and in support/supervision that allow them to explore their own feelings about their work
- using the peer support model to help them explore the consequences of their own behavior and decide how to correct any mistakes or handle challenging situations for themselves
- training them to use the peer support model so they can also apply it in other aspects of their lives.

4. **Valuing volunteers in a variety of ways is essential.** Volunteer recognition, both formal events and informal "thank yous," are one important part of valuing volunteers, but they are generally not adequate to retain volunteers over time. In addition, your day-to-day relationships and your program structure need to reflect your volunteers' importance to you and your agency.
Key Principles

In terms of your relationships, for example, do you
• return phone calls promptly,
• have work ready when volunteers come in,
• greet them by name,
• listen to their challenges and successes with clients,
• acknowledge who they are as people as well as what they do?

In terms of your program structure,
• do volunteers have input into decisions which affect them,
• is there volunteer representation on the Board of Directors,
• do your screening and training prepare them for their work,
• do you provide the ongoing support they need to do their best?

5. Serving volunteers is as important as serving clients. In a very real way, the volunteer manager's clients are the volunteers. They need support and resources to provide top-quality service to clients over time, and it is part of the volunteer manager's role to provide this service. In fact, the quality of service given to the client can be no better than the quality of service given to the volunteer by the volunteer manager.

6. Quality relationships are the glue that holds the elements of a volunteer program together. Two relationships influence a volunteer's experience in critical ways: his/her relationship with the client(s), and with the volunteer manager. If these relationships are good, the volunteer is much more likely to stay when the work gets challenging. Relationships with fellow volunteers and other agency staff may also affect the quality of a volunteer's experience with the program and how long he/she is willing to stay.

7. The Shanti model of peer support is a powerful tool for volunteer managers to use in screening, training, and supporting volunteers. Often, we think of training volunteers to use a peer support model with clients. But the philosophy and skills underlying the model can be highly valuable tools for volunteer managers to use in building quality relationships with volunteers. The peer support model provides a way to put your values into practice.
Key Principles
Page 4

on a daily basis, and to create a program based in these values. This can sometimes include being willing to work with intense feelings – your own and the volunteers’.

8. Volunteer retention and quality of service to clients are enhanced when a volunteer program is designed to respond to the three core motivators which bring people to volunteer:
   - Desire to serve others (to help others, to make a difference, to give back, to do something meaningful).
   - Desire for connection (for belonging, being part of an organization or a cause, making new friends or "getting out of the house").
   - Desire to learn and grow in their professional and/or personal lives (desire for experience to put on a resume, to learn new skills, to grow emotionally or spiritually).
Volunteer Retention
Learning Objectives

At the completion of this module, participants will be able to:

• Identify programmatic and organizational factors that affect volunteer retention;

• Understand that all elements of a volunteer program constitute either an invitation for volunteers to continue or discontinue volunteering;

• Assess elements of a volunteer program from the standpoint of the effects on volunteer retention;

• Identify strategies for increasing volunteer retention.
Volunteer Retention

Benefits of Retaining Volunteers
Discussion Notes

Two ways to maintain an adequate number of volunteers

Ways that long-term volunteers can benefit a volunteer program
Invitations to Stay/Go
Instructions

**Purpose:** To identify factors in daily volunteer program operations which influence volunteer retention

**Task:** Make one list of the conditions that exist in your volunteer program that encourage volunteers to stay, and another list of conditions which might encourage them to leave. Consider organizational factors, program structure, and your relationships with volunteers.

**Process:** Small group discussion. Please choose a recorder/reporter to write down your group’s ideas and share them with the whole group. You will have 20-25 minutes. Reports: Each group will report 2 invitations to stay and 2 invitations to go until all all items from all groups are shared.

**Invitations to Stay**

**Invitations to Go**
Invitations to Stay/Go Discussion

If you wish, record the condition which is an invitation to stay or go in the left-hand column. Then indicate in the right-hand column whether it is an invitation to stay or to go in your program.

<table>
<thead>
<tr>
<th>Invitation</th>
<th>Stay/Go</th>
</tr>
</thead>
</table>

*Everything you do as a volunteer manager is either...*  
...an invitation for a volunteer to stay or...an invitation to go.*
<table>
<thead>
<tr>
<th>STRATEGY</th>
<th>WAYS TO ACHIEVE IT IN YOUR PROGRAM</th>
</tr>
</thead>
<tbody>
<tr>
<td>Valuing the contributions of volunteers</td>
<td></td>
</tr>
<tr>
<td>Creating community</td>
<td></td>
</tr>
<tr>
<td>Using the peer support model</td>
<td></td>
</tr>
<tr>
<td>Screening volunteers</td>
<td></td>
</tr>
<tr>
<td>Preparing volunteers for fulfilling</td>
<td></td>
</tr>
<tr>
<td>relationships with clients</td>
<td></td>
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</tbody>
</table>
Invitations to Stay: Strategies for Volunteer Retention

<table>
<thead>
<tr>
<th>Strategy</th>
<th>Ways to Achieve It in Your Program</th>
</tr>
</thead>
<tbody>
<tr>
<td>Providing excellent training</td>
<td></td>
</tr>
<tr>
<td>Offering strong support and supervision</td>
<td></td>
</tr>
<tr>
<td>Creating effective relationships with volunteers</td>
<td></td>
</tr>
</tbody>
</table>

Retention influences every aspect of your program, and every aspect of your program influences retention. Therefore, all decisions about your program should be made with their effects on retention in mind.
Volunteer Retention

Additional Resources and Activities
Invitations to Stay/Go

Invitations to Stay: Why Volunteers Continue to Volunteer

- Relationship with clients.
- Relationship with you (based on mutual respect, positive regard, empathy)
- Connection to other volunteers, sense of belonging (through support and supervision structure, working as a team)
- View volunteer work as a source of personal and spiritual growth (communication style, values, service, etc.).
- View volunteer work as a source of professional growth.
- Self-esteem and sense of connection to a mission or cause, values larger than themselves.
- Feel valued by the organization, know they're making a difference.
- Are offered opportunities to increase their skills and take on new roles and responsibilities.
- Your organization has good relations and reputation in the larger community, so the volunteer is pleased to be associated with you.
- Competent, caring management (e.g., you return their phone calls)

Invitations to Go: Why Volunteers Discontinue

- Unsatisfactory experience with client, volunteer manager, or other volunteers.
- One or more client matches that don't work well (caused by a bad match, poor training and emotional preparation, personality conflicts, unsuitability of volunteer in some way, inadequate support for setting boundaries)
- Difficulties in support group (caused by disruptive member, poor group leadership such as bad time management, unfocused meetings, personality differences or conflicts within the group; volunteers' resistance to support group; diversity issues within group).
- Volunteer feels poorly treated by others in the organization (other staff relating poorly to volunteers) or that volunteers are not valued (poor volunteer appreciation efforts, etc.).
- Volunteer is not adequately prepared in training for situations she/he encounters and does not experience the work as fulfilling because of lack of skills, lack of confidence, lack of support and supervision.
- Volunteer feels unsupported, not liked or appreciated by volunteer manager (not returning phone calls is certain to cause problems).
- Volunteer feels organizational structure and/or policies are too rigid.
- Volunteer unable or unwilling to follow policies and is asked to leave. (Perhaps a function of poor training/unclear boundaries/poor supervision; unsuitable volunteer chosen/accepted; personal predisposition).
- Volunteer experiences a life change (new job, relationship, illness, new interests, moving).
Strategies for Volunteer Retention

- Valuing the contributions of volunteers at all levels of the organization. This attitude should be consistently evident in all activities involving volunteers and in how staff interacts with volunteers.

- Creating community. The desire to belong to a group with whom we share values, vision, or mission is at the heart of many volunteers' motivation. Meeting this need to connect with others in community is an important component of volunteer retention.

- Using the peer model as a basic model of communication between individuals, within groups of volunteers, and between volunteer manager and volunteers. The peer model promotes open, honest communication, good listening skills, and mutual respect, thereby making connections to others more likely.

- Screening and interviewing volunteers ensures that the volunteers we invite into our programs and into the lives of our clients will be able to offer high quality service to clients and will, themselves, be served by the volunteer experience.

- Preparing volunteers for fulfilling relationships with clients. One of the most important reasons volunteers continue their work is their relationship with their clients. For many volunteers this is the most powerful reward for the work they do.

- Providing excellent training. Training prepares volunteers for the work they will do. The training process can result in a strong sense of community in a volunteer program. Each of these factors affects volunteer retention.

- Supporting and supervising volunteer/client relationships well, so that they are smooth and mutually beneficial. Without an excellent support system, volunteers cannot sustain their work for long periods, regardless of how carefully they are screened or how well they are trained.

- Creating effective relationships with the volunteers you supervise. Your relationships with volunteers can be either a clear invitation to stay or an invitation to go.
Volunteer Retention
Reflection/Assessment
Page 1

What are you as an individual doing which invites volunteers to stay?

• How are you valuing volunteers?

• How are you building quality relationships with them?

• How are you helping to build community among volunteers?

• In what ways are you effective in using the peer support model with volunteers?

• What else would you as an individual like to be doing to ensure that volunteers want to stay?

• What do you want to stop doing because it might be encouraging volunteers to leave?
Volunteer Retention
Reflection/Assessment
Page 2

What are the ways your program invites volunteers to stay?

- What are the structural ways your program values the contributions of volunteers?

- How are you building community among volunteers in your program?

- Are the philosophy and tools of the peer support model reflected in your program structure?
Volunteer Retention Reflection/Assessment

Page 3

- How effective are your procedures for screening, training, and supporting volunteers?

- How do you prepare volunteers for fulfilling relationships with clients?

- What else do you want to do in your program to ensure that volunteers want to stay?

- What do you want to change about your program because it might be encouraging volunteers to leave?

You may want to consider this same set of questions, substituting your broader organizational context for program structure and procedures. Often the organizational factors are less in your control, but they can still send powerful invitations to stay or go to your volunteers.
Screening Potential Volunteers
Learning Objectives

At the completion of this module participants will be able to:

- Identify the potential adverse effects of accepting inappropriate candidates.

- Develop a screening process that will ensure selection of qualified candidates for volunteer positions.

- Screen out an inappropriate volunteer firmly and with compassion.
Results of Inadequate Screening

On volunteer retention

On quality of service to clients

On your relationships with volunteers

On volunteers’ relationships with each other

On training

On support and supervision

On your program as a whole

On your agency/organization as a whole
Screening Potential Volunteers

Alternative Tools for Volunteer Screening
Shanti’s Screening Process

Application form (sample in “Additional Resources” section following page 5.14)

Group interview/individual follow up (guidelines in “Additional Resources” section following page 5.14)

Training
Screening Case Study

Margaret, who is a volunteer coordinator in an organization offering peer counseling and practical support services to the elderly, is in the process of screening potential volunteers for her upcoming training. In the past year it has become increasingly difficult to recruit volunteers to work with the elderly. Both Margaret and the Program Director are concerned about the declining size of the volunteer training. Together they have established a goal of twenty-five prospective volunteers for each training.

Two weeks before the training, Margaret has only 15 trainees who have been interviewed and accepted. In the past several interviews, Margaret has turned down 5 potential volunteers because she felt they were unsuitable in various ways. She is now considering accepting these candidates into the training.

What is your advice to Margaret about reconsidering these 5 potential volunteers?

☐ Yes, she should accept them. Please explain why below:

☐ Maybe she should reconsider. Please explain why below:

☐ No, she should stick with her initial judgment and screen out these potential volunteers. Please explain why below:
Using the Peer Support Model to Screen Out a Potential Volunteer Discussion

What thoughts/feelings come up as you watch this demonstration?

How does the "volunteer manager" demonstrate the values underlying the peer support model in this role play?

What skills does the "volunteer manager" demonstrate in using the peer support model to screen out this volunteer?

What would it be like for you to use the peer support model in screening out inappropriate applicants?
Using the Peer Support Model to Screen Out a Potential Volunteer

Key Points

Valuing this person and all volunteers

Supporting hurt or angry feelings

Describing behavior to explain why

Being honest/direct about the reasons

Giving a clear no.
Screening Potential Volunteers

Additional Resources and Activities
Factors to Consider in Selecting Volunteers

- What is the target population served by your organization?
- What will be the role and tasks of the volunteer?
- What personal characteristics are desirable in this role?
- What personal characteristics are required in this role?
- Are factors such as age, sexual orientation, gender, religious or spiritual beliefs, or ethnicity relevant?
- What specific skills and capabilities are required? (Volunteers may already have these skills or your training may teach them).
- Considering the target population and the type of work the volunteers will be doing, is there any specialized information you need in order to assess the suitability of the volunteer? (mental health history, psychoactive medications, substance use history, criminal history, personal or professional references).
- If there is a substance abuse history, how long must a potential volunteer have been clean and sober?
- If there is a history of mental illness, would you accept someone who is taking medication and is currently stable?
- Is the volunteer willing to provide required documentation such as driver’s license, fingerprint, physical exam, TB test, etc.?
- Add to this list any additional factors that are important in your volunteer program.
Guidelines for Developing a Volunteer Screening Process

Step One: Develop a job description and criteria.

Who are the clients in your program? What are their needs and concerns?

What is the role of volunteers in your program? What are their primary tasks?

What are the qualifications (knowledge, skills, values, experiences, personal characteristics, attitudes) a volunteer needs in order to be successful in your program?
Guidelines for Developing a Volunteer Screening Process

Step 2 – Choose the screening tools you will use.
Which of the screening tools listed below will be most effective in determining whether a potential volunteer for your program possesses the qualifications you have identified? Place a check beside each component you choose and a brief note explaining why you chose it.

☐ Written application form

☐ Phone interview

☐ In-person interview (individual or group)

☐ Fingerprint and/or criminal background checks

☐ Driving record

☐ References (personal and/or professional)

☐ Training.

☐ Others?
Guidelines for Developing a Volunteer Screening Process

Step 3: Determine what information potential volunteers need about your program.

Potential volunteers need to make an informed choice about whether your program is a good fit for them. List the information you will provide them in the left column below, and how you will provide it in the right column (conversation, print materials, group orientation, etc.). (For example, you might write "position description" in the left column, and "print copy" in the right.)

<table>
<thead>
<tr>
<th>INFORMATION PROVIDED</th>
<th>PROVIDED HOW</th>
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</tbody>
</table>

Step 4: Design the sequence of steps in the screening process.

What sequence of steps will you follow in your screening process, from initial contact to acceptance of the volunteer into the program (or screening him/her out)?
Sample Shanti Screening Materials

Following this page are copies of the Shanti volunteer application form and the interviewer guidelines for our group interview process. The guidelines provide a script that the interviewer uses as the basis for conducting the process. Feel free to use these as samples, adapting them to the needs of your own program as you see fit.
Volunteer Application

Thank you for your interest in our volunteer program and the work we are doing at Shanti to provide support to people who are living with the challenges of HIV disease and AIDS.

Today’s Date ________________________  Your Birth date/Age ________________________

Name ________________________________

Address ______________________________

City __________________ State ______ Zip ________

Home Phone __________________ Work Phone __________________

Email address __________________

Your job title __________________ Your Employer __________________

If you are a student, your field of study __________________

If you are a student, your school __________________

Emergency contact name __________________

Address ______________________________

Phone(s) __________________ Relationship to you __________________

• What languages other than English do you speak?

• Have you ever applied to be a Shanti volunteer?  ____ Yes  ____ No
  If yes, when and for what program? __________________

• How were you referred to Shanti? __________________

• Please identify yourself:
  ____ Male  ____ Female  ____ Transgender  ____ other
  ____ Heterosexual  ____ Gay  ____ Lesbian  ____ Bisexual  ____ other

• Ethnicity/race __________________

• Do you have a  ____ car  ____ truck  ____ driver’s license  ____ automobile insurance?
1. **I am applying for:** (review the enclosed list of volunteer opportunities and check the ones that interest you)
   - Peer support to Shanti clients
   - Client Activities Desk
   - Client Workshops
   - General office/clerical
   - Outreach/special events
   - Fundraising
   - Other

2. **Your availability for volunteer work** (check all that apply)
   - Weekdays: __________ Mornings __________ Afternoons __________ Evenings
   - Weekends: __________ Mornings __________ Afternoons __________ Evenings

3. **If applying to be a Peer Support Volunteer:**
   - We ask Peer Support volunteers to make a 6 month commitment. Are you ready and able to do this? ________
   - Can you commit to attending a once a month support group? M, T, W, Th, 7-9 p.m. or Th 11a.m.-1p.m. ________

4. **Describe your current or previous volunteer experience(s):**

5. **Are you in the first 6 – 12 months of a recovery program?** __Yes__ __No__

6. **Describe any major life changes you’ve experienced in the past 12 months (entering a recovery program, loss, ill health, relocation/move, job, relationship, etc.):**

7. **Do you have any personal health concerns that might impact your work as a volunteer (i.e., chronic illness, allergies)?**

8. **How has HIV/AIDS or other serious illness affected your life?** (You do not need to have been directly affected to become a Shanti Volunteer)


9. Tell us why you are thinking about becoming a Shanti volunteer: 

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

10. Our clients, staff, and volunteers come from many different backgrounds. They may include people of different ethnicities, genders, or sexual orientations, people who are active or recovering drug/alcohol users, or people altered by illness. How might you be challenged working with people who have different life experiences from your own?

________________________________________________________________________

________________________________________________________________________

________________________________________________________________________

11. References:

Name: 

Phone(s): 

Years Acquainted: 

May we call this person? 

Thank you for taking the time to complete this application. Mail it to us in the enclosed postage-paid envelope, or fax it to 415.674.0370, or drop it off in our office.

A Spanish language application is available from Manuel Sanchez-Mejorada at 415.674.4726.

We'll call you as soon as we receive your application.

Questions? Call Tara Stacker 415-674-4722.
Notes to interviewer
Pre-training Interview Guidelines

This meeting provides the opportunity to screen potential trainees. Applicants should do as much talking as possible to give you a sense of who they are, why they are here, and what they can bring to the work.

- **Thoroughly review** each application **prior to the meeting** – make note of anything that needs **further explanation or that you want to explore with applicant during group or individual interview** (i.e. recovery, recent loss, other life responsibilities, any ‘red flags’)

- Ask yourself during the interview:
  - Will he/she be an appropriate volunteer?
  - Can you see him/her working independently with a client?
  - Can you see him/her able to provide appropriate support to a client?
  - Can you see him/her working with others in a support group and in the training?

- Watch/listen for serious judgments and/or unresolved or big issues currently in his/her life that might affect his/her work as a volunteer.

- **At the end of the individual interview, you will make the decision if he/she is to participate in the training.**

- If you have concerns, talk them over with the applicant during the private interview.

- If it’s clear to you that the applicant is not appropriate, help him/her see the reasons – it is always best if the applicant makes the decision with you.

- If you feel strongly that you and/or the applicant need time to consider their participation in the training, make an agreement to check in with each other in no less than 36 hours.

- Be concise, clear, brief, and as positive as possible in giving feedback.

- If appropriate, discuss other volunteer opportunities at Shanti.

- If appropriate, discuss other organizations he/she would want to consider (use the HIV Resource Guide or CAVM brochure to make a referral). It is not appropriate to refer an applicant with mental health, substance use, or personality issues.

Pre-Training Interview Script
1. Welcome

Thank you for coming to this meeting. (Acknowledge the steps they took to get here – their interest in the work, requesting information, agreeing to this meeting.)

Thank you for completing a Volunteer Application and for being open in answering the questions on the application. You’re here today/tonight because you’ve indicated that you care, that you want to provide support to someone who’s living with a potentially life-threatening illness.

I’d like to propose that we practice ‘confidentiality’ during this meeting. That means that whatever any of you share during this meeting will remain confidential. It would not be appropriate for you to talk about anything that’s disclosed in this room with anyone outside of this room. Can we all agree to that?

2. Meeting Overview

During this meeting you’ll have the opportunity to

- Learn more about Shanti’s peer support volunteer program
- Talk about what you might be doing as a volunteer and with whom
- Hear about the training and the expectations we have for participants
- Ask any questions you have
- Make a decision with me (us), in a private meeting at the end of this meeting, about your continuing in the process to become a Shanti volunteer.

3. Introductions

My name is __________________. My job at Shanti is ____________________________ (tell a little bit about yourself, your history/experiences at Shanti and the meaning of the work for you – this models self-disclosure for applicant).

If second interviewer present, he/she introduces self next.

Please introduce yourself

- Tell us your name
- Tell us how you came to be here today; why you want to find out more about being a Shanti volunteer (be sure to get an answer here – acknowledge that it’s OK to want to get something out of doing this work.)

After all are introduced, ask:

- Would you be willing to share with us any concerns or doubts you are having about being
a HIV/AIDS caregiver? (as interviewer you can share here, if needed to get the conversation going, any concerns or doubts you had before becoming a volunteer or staff member; i.e. what if I getting too emotionally involved with my client; what if my client dies, what if I don't like my client or she doesn't like me?, is there enough time in already busy life to take this on?)

Acknowledge all answers here, including commonalities if there are any. Don't try to resolve or 'fix' any applicant's concerns.

4. About Shanti

Shanti has been providing emotional and practical support to people with life-threatening illness for 25 years – training 'ordinary people to do extraordinary things' to quote Shanti's founder Charlie Garfield. Over 10,000 people have participated in Shanti trainings.

Shanti currently serves 1400 clients annually. 150 clients are matched one-on-one with peer support volunteers. Another 25-30 receive regular laundry service and quick response practical assistance as needed.

In addition to the providing clients with a peer support volunteer, Shanti provides:
- Transportation to and from the food bank and medical appointments
- Free tickets to theatrical performances, concerts, SF Opera and Symphony, baseball games, etc.
- Advocacy, information and referrals for health care, mental health care, food, shelter, clothing, money management, drug and alcohol recovery, harm reduction, and more.
- Through Kairos, support groups and individual counseling for anyone who is experiencing bereavement and loss, or for anyone who is a caregiver for a family member, partner, or friend. This is not limited only to losses or caregiving around HIV disease or AIDS.
- A 16-week LIFE programs that assist clients in increasing their psychological well-being, their immune system functioning, and their long-term health stability.
- Access to all Shanti programs for monolingual and bilingual Spanish-speakers

Any questions about what we do at Shanti?

5. Volunteer Commitment

If you decide to volunteer at Shanti, we ask you to make a commitment to:
- Six months of service (more is encouraged)
- Twice a month support group meetings – this meeting is mandatory (it supports you and ensures our clients are getting the best possible service); meetings are two hours in length and you are assigned to a specific group that meets your schedule
- 4 – 6 hours a week (time with or for your client and your support group)

6. Questions to Applicants
A. Have you had any experiences with HIV/AIDS or other serious illness?

B. Have you thought about what our clients might need help with or want support around?
   (errands, grocery shopping; housekeeping; laundry; companionship and social outings;
talking about medication schedules, medical care, family stuff)

C. What do you think you could do to support a client you are matched with?

D. Have you thought about who you might be working with as a peer support volunteer?

Take answers, then add:

   Have you thought that it might be someone who’s different from you; someone who may be
   angry sometimes; someone who’s really sick, someone who doesn’t look or act sick; someone
   who lives in a neighborhood you’re not familiar with.

Take answers, then add:

Here’s some demographics on our clients who are asking for a peer support volunteer:
- mostly gay men (some with partners, or room-mates; some who live alone)
- ages mostly between 34 – 52
- some are women (married, single, some with children)
- some are children (either infected with HIV or affected because a parent or guardian
   has HIV disease)
- 85% white/European-Americans; 10% Latinos; 5% are African-Americans
- our clients live in all neighborhoods of SF (the majority within a 3-4 mile radius of this
  office); in houses, apartments, studios, some in the Tenderloin, some in the Castro
- Mostly all have to carefully watch their budgets
- For some, having HIV/AIDS is not the major issue in their life (for some it’s housing,
  mental health or substance use issues)
- Some have friends and family who are offering support; some don’t have any support
  other than health care providers

E. Any thoughts or concerns about who you might be matched with?

7. The Training
It’s 45 hours, 4 1/2 days beginning ________________.

This training is for you – and is about you. It’s about giving you tools and skills and experiences that will assist you in being a support volunteer. You’ll probably use these tools and skills in all the other parts of your life, too! With family, friends, co-workers.

The training includes presentations and discussions HIV/AIDS information; Active listening/peer counseling; self care and boundaries; issues of diversity; the spirit of service in our lives; topics that may be affecting clients: substance use, suicide, loss and grief, and the psychosocial and clinical issues of living with a disease – loneliness, abandonment, loss of self esteem, medical care and options.

Experiential Exercises – designed to help you recognize and acknowledge your thoughts and feelings around some of the issues our clients may be facing. It’s about self-exploration and expression. Who you are as a person is the greatest contribution you can make to someone who’s requested help.

Any questions or thoughts about the content of the training?

Any thoughts about the length of the training? It’s long!
8. Training Evaluations and Expectations

Participants are evaluated by the training team (Shanti staff and volunteer facilitators). You’ll receive feedback. We want the training to be a positive experience for you. We want to offer our clients the best possible volunteers.

At the training you’ll be evaluated on your ability to:
- Attend the entire training
- Participate in discussions and exercises
- Agree to honor Shanti policies
- Cooperate in a group setting
- Accept and incorporate feedback
- Incorporate peer counseling skills and tools into your communication style
- Try to identify and explore emotions in yourself and others

Please ask questions during the training. This training is for you. We hope you’ll be self-evaluating during the training. It’s ok if you decide not to volunteer at this time.

Any questions?

9. Shanti Model of Peer Support

I’d like to ask you to think of someone in your life who you really enjoy talking with about what’s going on in your life? You don’t have to tell me who that person is. Just think about that person you feel comfortable with. The person you want to talk to when you’ve got a problem or an issue that’s causing you some anxiety?

Wait a minute or two.

What is it that that person does that makes you want to tell your story to him or her? (take answers; discuss similarities; discuss what doesn’t work for them or what they wish a listener would do) Hopefully they will have said ‘just listens; doesn’t judge me; helps me figure out the answers; I trust that person; doesn’t tell me what I should do, etc.’)

Repeat the things they’ve mentioned (the ones that mirror the model of peer support!)

- I propose that what you say is supportive to you can be of immeasurable support to someone dealing with all that comes with HIV/AIDS. At Shanti, we call what you just described ‘active listening’. It’s part of the ‘Shanti model of peers support’. It means that we can all probably solve our own issues and concerns if we’re given a space that is
trusting, honest, and without judgement. You’ll hear more about this during the training.

- And you’ll have an opportunity during the training to practice being active listeners with each other.

- Any questions?
10. Individual Interview

I’d like to meet with each one of you privately for about 6-7 minutes.

Let me review your application again quickly to see if I have any questions for you. Review the application again. Ask for clarification of anything you need.

Explore/discuss any issues that were revealed during the group meeting and/or anything written on application that you have questions or concerns about.

Address any concerns applicant expressed during the meeting.

If the applicant at this time indicates he/she does not want to continue:

Thank him/her for his/her time. Ask if he/she would like to talk about other ways to volunteer at Shanti. If yes, schedule an appointment to do so.

Ask questions #A - #E before you begin a discussion around any concerns you have about the applicant’s emotional stability, level of personal issues, ability to work with intense issues at this time, or ability to work in a team (as part of the training and/or support group).

I need to ask you a couple more questions.

A. Have you ever worked as member of a team, maybe in another volunteer organization, or in your job, or in school? How was that experience for you?

As a participant in our training you’ll be working closely with other participants and the training team. If you go on to become a Shanti volunteer you’ll be working together with the members of your support group.

B. Have you been or are you currently in therapy or counseling? If yes, please tell me a little bit about the issues you are talking about in counseling.

If yes, have you discussed your interest in the Shanti volunteer training with your therapist?

If applicant has not yet talked with his/her therapist, and you think applicant is viable, ask applicant to talk with his/her therapist and call you when they have.

C. Are you currently taking any psychotropic (psychiatric) medications (i.e. Prozac, Lithium, Valium, etc)? (48 million Americans do!)

If yes, please tell me a little bit about why and when that med was prescribed for you, and how you are doing now.
*Ask questions D. and E. only* if previous responses or comments have indicated to you that the applicant may have issues with around diversity and/or judgements, or substance use.

If you don’t have to ask these questions, skip down to #11.

**D. Are you or have you ever been in a recovery program?**

If the applicant has shared in group that he/she is in recovery, ask how long? (see below)

*Any experiences with substance use issues (your own, someone in your family or a friend)?*

We want to know that an applicant is going to be open to the Shanti model as it extends to substance use and harm reduction.

Check any previously unrevealed recovery issues here. Shanti policy requires a potential peer support volunteer to have been in a recovery program for **at least one year** prior to attending the training. (It’s our experience our volunteer program doesn’t work well for people newly in recovery. Our program asks volunteers to put aside all of their issues and be available for another person. We do welcome people in recovery to consider volunteering with us in other ways).

**E. Do you feel you may be ready to work with someone who is different from you? What would that be like for you?** (reference any ‘strong’ feelings/thoughts applicant may have discussed, ie. religion, substance use, etc.)

---

**11. Closing the Interview**

*Do you have any questions about anything we’ve talked about today/tonight? Any concerns or doubts about your ability to do this work or participate in the training?*

Discuss any concerns or doubts with applicant.

**If accepting the applicant to the training:**
- Welcome them to Shanti
- Give them acceptance letter (point out training dates, location, logistics)
- Ask for signature on Release Form
- Point out any concerns or challenges you see for this person in the training or in the work

**If not accepting applicant:**
- Explore your rationale with applicant; ideally, they will make decision with you
• Give open, honest clear, feedback (in indentifying the reason you believe this isn’t the appropriate time for them to participate in the training or this isn’t the work you believe is appropriate.

• If you think it’s appropriate, tell applicant you don’t feel certain, and tell them you need to discuss the decision with Volunteer Services staff and will follow up in 1-2 days with him/her.

• Offer alternative volunteer opportunities at Shanti or another agency if appropriate
• Thank applicant for coming to Shanti and spending this time with you.
• Ask them to call you with any questions
• Thank them for wanting to be a part of Shanti

12. Paperwork Completion

Complete Interview Form.

Staple Interview Form on top of application and Release Form.

Return forms to lavender folder.

Return folder to Volunteer Coordinator.

Vsvol/Pretrain/interview/11/99
Support and Supervision
Learning Objectives

At the completion of this module participants will be able to:

- Enhance their effectiveness in establishing and maintaining quality relationships with volunteers using the Shanti model of peer support.

- Use a variety of strategies to develop/enhance the effectiveness of the support and supervision process for their programs.

- Differentiate between volunteer support and volunteer supervision and enhance their effectiveness in providing both as appropriate.
The quality of the care volunteers give to their clients will be no better than the quality of the care you give to the volunteers.
Using the Peer Support Model with Volunteers

Kris and Cole Case Study

Guidelines for Listening

What is the nature of the relationship between Kris, the volunteer manager, and Cole, the volunteer?

How would you describe Kris as a person? What are her values, communication style, personality attributes?

How does Kris use who she is as a person in working with Cole?

What specific skills does Kris demonstrate as she uses the peer support model with Cole?
Using the Peer Support Model with Volunteers

Kris and Cole Case Study

Discussion Notes

What feelings, concerns or issues come up as you listen to this case?

How does Kris use the Shanti model of peer support to build a quality relationship with Cole in this interaction?

What are the benefits of the relationship to Cole as the volunteer?

What are the benefits of the relationship to Kris as the volunteer manager?

What are the differences between support and supervision? What enables Kris to stay in "support mode" in this interaction with Cole?
Strategies for Support and Supervision

Using the peer support model.

Intention to be of service.

Building credibility.

Being willing to invest time.

Being willing to engage in the expression of strong emotions.
Case Scenario Worksheet

Name given to scenario: _______________________

Brief description of the scenario:

Underlying relationship issues:

Underlying structural issues:
Case Scenario Worksheet

Name given to scenario: ____________________________

Brief description of the scenario:

Underlying relationship issues:

Underlying structural issues:
Case Scenario Worksheet

Name given to scenario: ____________________________________________

Brief description of the scenario:

Underlying relationship issues:

Underlying structural issues:
Case Scenario Worksheet

Name given to scenario: __________________________

Brief description of the scenario:

Underlying relationship issues:

Underlying structural issues:
Role Play Observation

Case Scenario: ________________________________

(NAME OF CASE)

These are the primary skills of the peer support model. As you watch the role play, notice how the "volunteer manager" uses each of these skills and make note of examples below if you wish.

- **Being present** (using who you are/putting your values into practice)
- **Eye contact** (should match the speaker's level)
- **Open body language** (facial expressions, body position)
- **Energy level, proximity** (should generally match the speaker's level)
- **Allowing silence** (should feel comfortable)
- **Encouragers and repetitions** ("um-hmm," I see, literally repeating a word)
- **Paraphrasing** (restating the essence of what the speaker has said)
- **Reflecting feelings** ("so you feel..." or "sounds like you're..." or "how does that feel?")
- **Asking open-ended questions** (cannot be answered "yes" or "no")
Role Play Observation

Case Scenario: ________________________

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- Asking open-ended questions (cannot be answered "yes" or "no")
Support and Supervision

Additional Resources and Activities
Some Benefits of Effective Relationships Between Volunteer Managers and Volunteers

- Connecting as two human beings makes the work of both the volunteer manager and the volunteer more fulfilling and rewarding.

- There will be fewer conflicts and problems among volunteers, and resolutions will happen more quickly and easily when there is mutual respect and trust between and among the volunteer manager and volunteers.

- Volunteer supervision will be more effective and may require less time from the volunteer manager because the relationship between him/her and the volunteer empowers the volunteer. Volunteers are more likely to keep agreements that are made without constant monitoring from the volunteer manager.

- The quality of service to clients will be enhanced, and there will be fewer problems with client services. When a problem does arise, volunteers are more likely to raise it promptly so it can be addressed quickly.

- It is easier for the volunteer manager to support and encourage the volunteer in taking care of him/herself. The volunteer will be more likely to let the volunteer manager know about personal issues which may be relevant to the work.

- Volunteers will be more willing to take on additional tasks and roles.

- Volunteers will stay longer. The volunteer's commitment to the agency and its mission will be enhanced.

- A quality relationship with the volunteer manager will tend to enhance the self-esteem of the volunteer. This in turn will increase the volunteer's self-confidence, leading to greater success and satisfaction, and increased retention.
Additional Case Scenarios
Page 1

Most likely, you have plenty of your own examples of challenging experiences with volunteers to use as opportunities to analyze underlying issues and practice the peer support model. The following examples are from participants in "In the Spirit of Service," and are offered to get you started in thinking of your own cases.

1. About two months ago, Susan was matched as a mentor with Jamie, a 13-year old girl who lives with her family of 8 in a two-bedroom apartment. Susan is complaining that Jamie doesn't return her phone calls. She leaves one message asking if Jamie wants to participate in a particular event, and if she doesn't hear back, she assumes that Jamie is not interested. She's only seen Jamie twice in the two months, and has concluded that Jamie doesn't really want a mentor. She has asked you to assign her to a new mentee who really wants her help.

- What are the potential underlying issues in this case, both structural and relationship?

- How will you use the peer support model in your conversation with Susan?
2. Bill is a volunteer team leader who organizes special events for your program. For each event, he coordinates the work of a team of volunteer college students. After the last event, several of the college students told you they didn't want to volunteer again because Bill had been rude and critical of them. You have asked to have a conversation with Bill to find out what happened.

• What are the potential underlying issues in this case, both structural and relationship?

• How will you use the peer support model in your conversation with Bill?
Observation Guidelines
For Role Plays/Real Plays

When you see the speaker demonstrate one of the behaviors below, either make a note about what was said or simply make a check mark to indicate that he/she used that behavior.

• Being present (using who you are/putting your values into practice)

• Eye contact (should match the speaker’s level)

• Open body language (facial expressions, body position)

• Energy level, proximity (should match the speaker’s level)

• Allowing silence (should feel comfortable)

• Encouragers and repetitions (um-hmm, I see, literally repeating a word)

• Paraphrasing (restating the essence of what the speaker has said)

• Reflecting feelings ("so you feel...") or "sounds like you’re..." or "how does that feel?")

• Asking open-ended questions (cannot be answered "yes" or "no")
Developing a Support and Supervision Structure

This worksheet lists a variety of factors to consider as you develop a new support and supervision structure or assess the effectiveness of your current one.

1. What is the nature of your volunteers’ work with clients? (The more "yes" answers you give, the more support you need to be providing volunteers.)

   - Does the work involve an on-going relationship between a volunteer and a given client (as opposed to a volunteer who sees a specific client only a few times, or one who never has direct client contact)?

   - Do the volunteer and client meet alone, in an unsupervised setting (such as the client’s home)?

   - Is the work apt to be emotionally challenging (such as working with terminally ill persons, those with mental health diagnoses, prisoners, frail elderly, the homeless, etc.)? (Remember that even work as apparently straightforward as delivering meals to home bound elderly may stir strong emotional reactions for volunteers.)

   - Are volunteers likely to be challenged around setting boundaries in their work with clients? How?

   - Are your clients’ emotional and/or physical needs great? Do they need/receive clinical or other services from trained professionals as well as the services they receive from volunteers?

   - What other aspects of the nature of the volunteer’s work should be considered?
2. What is your volunteers' perception of their need for support? (Ask them!)

- How do volunteers feel about the support or supervision they are currently receiving?

- What type(s) of support do volunteers want? With what frequency?

- Do they feel that support and/or supervision are needed?

- Is their perception different from yours? If so, how do you account for the difference?

- How do you think their perceptions will affect the ways volunteers respond to new or changed support and supervision structures?
Developing a Support and Supervision Structure

3. What are your resources?
   
   • What staff time and skills are available? If you want to provide more support to volunteers than you currently are, how will you adjust your priorities to make time?
   
   • What funding is available?
   
   • If you want to use volunteer support group facilitators, do you have likely candidates? How will you train/prepare them for this role?
   
   • What space is available for meetings?

4. What grant or contract requirements are there regarding support and supervision?

5. What patterns are you encountering in the type or frequency of problems you are having with volunteers?
   
   • Could any of these problems be prevented or addressed by a different support and supervision strategy/structure?
6. Based on your answers to questions 1-5, what frequency of contact is most appropriate?

   - What frequency of contact do you (or other staff if appropriate) need in order to build quality relationships with volunteers? To feel adequately informed about what's happening in their relationships with clients? To feel assured that clients are receiving top quality service?

   - What frequency of contact do volunteers need with each other to build a sense of community?

7. Based on your answers to questions 1-5, what type of contact will both provide volunteers with the support they need as well as get you any data you need for record-keeping? (A combination of types may work best.)

   - Written reports
   - E-mail check-in
   - Telephone check-in
   - One-on-one meeting
   - Staff-led support groups
   - Volunteer-led support groups

8. How will volunteers benefit from participating in the support and supervision process you've outlined?
Shanti Peer Support Groups
Frequently Asked Questions

Who attends? Who provides leadership/facilitation?
Shanti's peer support groups include about 8 volunteers plus two volunteer co-facilitators. Generally, the facilitators have been Shanti volunteers with their own clients for at least one year, and receive special training to facilitate the support group.

What is the attendance requirement?
Shanti volunteers are required to attend their support group meeting for at least the first six months of their volunteer experience. If a volunteer is not attending his/her support group meeting regularly, the volunteer manager addresses the issue directly with the volunteer. After their first six months, volunteers may choose to check in with the volunteer manager by telephone instead of participating in a support group. Less than 10% of Shanti volunteers choose to do this (over 90% choose to continue with their support group).

What is the time commitment?
Support groups meet every two weeks for about 2 hours. Overall, Shanti volunteers commit to spending 4-6 hours a week with their client. Their support group meeting is included in this time commitment (so two of the 8-12 hours they commit every two weeks is spent in their support group meeting).

What happens at a support group meeting?
Each group has its own "culture" (i.e., some share food, some don't; some rotate among members' homes, some meet at Shanti; some meet during the day, most in the evening). They all use a standard format of a personal check-in (how the volunteer is doing in his/her life), and a client check-in (how each volunteer's client is doing). They then offer each other support around any concerns, using the peer support model.

How do the groups work for supervision and record-keeping?
After each support group meeting, the volunteer facilitators check in with the volunteer manager to give him/her a report on how each volunteer and client are doing. They also report the hours that volunteers have worked at this time.
Sample Volunteer Policies and Agreement for Shanti Peer Support Volunteers

Page 1

1. A volunteer agrees to active participation with Shanti for a minimum of six months and to provide four to six hours of service per week to their client (this includes support group time).

2. A volunteer agrees to call his/her matched client within 36 hours of receiving client name and phone number to arrange a time to meet in person at the earliest possible time.

3. A volunteer agrees to attend all of his/her assigned support group’s meetings, and to notify group leaders in the event of any intended or emergency absences.

4. A volunteer who is unable to see his/her clients(s) because of vacation, illness, or personal emergency, agrees to contact the Volunteer Program Manager immediately.

5. A volunteer agrees to a firm commitment to confidentiality about all client, volunteer, and agency information.

6. A volunteer agrees not to act as Power of Attorney, Executor, or Witness for any client with whom they have a professional relationship through Shanti.

7. A volunteer agrees not to engage in sexual activity with any client with whom they have a professional relationship through Shanti. This includes any person in the client’s household, the client’s significant other, members of the client’s family or circle of friends to whom the volunteer has been introduced by the client or the client’s family.

8. A volunteer acknowledges that it is suggested they not consume alcohol before visiting their client and that they agree not to consume enough alcohol when they are with their client to diminish their ability to work effectively with their client.

9. A volunteer agrees not to use any illegal substance with any Shanti client.

10. A volunteer agrees not to stay with or provide services to a client who refuses to remove illegal substances or paraphernalia from view, or who is engaging in an illegal drug transaction. A volunteer agrees to notify the Volunteer Program Manager of any such client activity.

11. A volunteer agrees to notify the Volunteer Program Manager following any discussion or reference by the client to suicide ideation.

12. A volunteer agrees not to assist in or be present at a client’s planned suicide, and to notify the Volunteer Program Manager of the client’s plans.
Sample Volunteer Policies and Agreement for Shanti Peer Support Volunteers

Page 2

13. A volunteer agrees to advocate for delay if their client is in a crisis suicide situation and has immediate means and intention to commit suicide. A volunteer agrees that if a client does not agree to delay his/her intentions to commit suicide, he/she will call 911 from the client's home or a nearby telephone.

14. A volunteer agrees to contact the Volunteer Program Manager or any Client Services staff member immediately about a crisis suicide situation. If such a medical emergency happens outside of Shanti business hours (9:00AM-5:00PM, Monday-Friday), a volunteer agrees to call the Volunteer Program Manager at home or their support group facilitator(s).

15. A volunteer acknowledges that it is recommended that all Shanti volunteers receive a yearly TB test. A volunteer working with children agrees to have a yearly test and to provide the Volunteer Program Manager with a copy of the test results.

16. A volunteer agrees to follow Universal Infection Precautions (as outlined in the Support Volunteer Training Manual) and to wear latex gloves any time direct contact with bodily fluids is anticipated.

17. A volunteer agrees not to accept financial gifts from his/her client. (Non-financial gifts may be accepted according to the volunteer's sense of ethical appropriateness.)

18. A volunteer agrees to be receptive to feedback and supervision from Shanti staff members, and to deal with any conflict with the person directly involved.

19. A volunteer working with children agrees to be fingerprinted for previous criminal offenses per California state and federal law.

20. A volunteer agrees not to drive with any client as a passenger in their vehicle unless the volunteer maintains the minimum state required insurance coverage for bodily injury. A volunteer agrees not to drive any Shanti client’s vehicle.

21. A volunteer agrees to notify the Volunteer Program Manager immediately of any change in their address or phone number(s).

Volunteer Signature

Volunteer Name (please print)

Date
Volunteer Training
Volunteer Training

Learning Objectives

At the completion of this module, participants will be able to:

- Identify the connections between volunteer training and retention.
- Identify the benefits of their current volunteer training in terms of its effects on volunteer retention, quality of service to clients, and overall program success.
- Assess their own training on five key goals of effective volunteer training.
- Incorporate ways to build community, teach skills, and offer opportunities for personal growth into their own volunteer training.
Benefits of Volunteer Training

Instructions

**Purpose:**
To identify the range of benefits effective volunteer training has on volunteer retention, quality of services to clients, and overall program success.

**Task:**
1. Briefly describe your current volunteer training (in 2-3 sentences)
2. List the benefits of an effective volunteer training to volunteers
3. List the benefits of an effective volunteer training to others (volunteer manager, other staff, clients, community at large)

**Process:**
Small group discussion. Please designate a recorder to make the group's list and report to the whole group. You will have 15 minutes for this discussion.

**Reports:**
Each group will report two benefits to volunteers and two to others until all items are listed.

<table>
<thead>
<tr>
<th>Benefits to Volunteers</th>
<th>Benefits to Others</th>
</tr>
</thead>
</table>

"In the Spirit of Service" Shanti National Training Institute  Copyright ©1999 Page 73
Benefits of Volunteer Training
Discussion Notes

Benefits to volunteers

Benefits to others

• Clients

• Other staff

• Volunteer manager, individually

• Volunteer program as a whole

• Agency/organization as a whole

• Community at large
Primary Goals of the Shanti Volunteer Training

1. Creating an atmosphere which values volunteers, both as individuals and for the work they do.

2. Creating community and building personal connections -- among volunteers, between volunteers and volunteer manager, between volunteers and staff who are trainers/presenters.

3. Creating opportunities for personal exploration, expression, and growth.

4. Creating opportunities to explore the nature and rewards of service.

5. Providing necessary information, skills and skills practice.
Ways to Achieve Volunteer Training Goals

"In the Spirit of Service" also strives to achieve the five goals of effective volunteer training, even though this workshop is for volunteer managers. What activities have you experienced in this workshop that have:

Valued you as individuals and for the work you do as volunteer managers?

Created community and built connection among this group?

Created opportunities for personal exploration, expression, and growth?

Created opportunities to explore the nature and rewards of service?

Provided necessary information, skills, and practice?
Volunteer Training Assessment

**Step One:** On each of the goals below, there are two ratings. In column A, assess the importance of the goal to your volunteer training. In column B, assess the effectiveness of your current training on that standard. Please note that 1 is low and 5 is high.

<table>
<thead>
<tr>
<th>Column A</th>
<th>Column B</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Importance</strong></td>
<td><strong>Effectiveness</strong></td>
</tr>
</tbody>
</table>

1. Create an atmosphere that values volunteers.  
   Column A: 1 2 3 4 5  
   Column B: 1 2 3 4 5

2. Create community and build personal connections.  
   Column A: 1 2 3 4 5  
   Column B: 1 2 3 4 5

3. Create opportunities for personal exploration and growth  
   Column A: 1 2 3 4 5  
   Column B: 1 2 3 4 5

4. Create opportunities to explore the nature and rewards of service.  
   Column A: 1 2 3 4 5  
   Column B: 1 2 3 4 5

5. Provide information/skills and the opportunity to practice skills.  
   Column A: 1 2 3 4 5  
   Column B: 1 2 3 4 5

**Step Two:** Circle one of the five standards above that:
- Is important to your program
- You would like to be more effective
Enhancing Your Volunteer Training

PURPOSE: To identify two or three specific ideas you can implement easily and quickly to enhance your volunteer training.

TASK: Share the goal you’ve selected to work on (from the "Volunteer Training Assessment") and generate as many ideas on how to enhance the effectiveness of your training on that goal with your small group.

PROCESS: Small group discussion, with the same group you worked with at the beginning of this module. You will have 10-15 minutes to give everyone in your group two or three ideas.

REPORTS: No formal reports. A few people will have the opportunity to share one idea they plan to implement to enhance the effectiveness of their training.
Volunteer Training

Additional Resources and Activities
Ways to Achieve the Primary Goals of Effective Volunteer Training

Page I

1. Creating an atmosphere which values volunteers, both as individuals and for the work they do.
   • Treating volunteers as you would an honored guest.
   • Greeting them individually when they arrive for the training, having name tags/materials ready.
   • Using the peer support model as the standard for communications.
   • Having lots of opportunities for them to contribute their own experiences/expertise; honoring all points of view.
   • Paying attention to their physical and emotional well-being throughout the training.
   • Creating as attractive a physical environment as possible (flowers).
   • Providing food.
   • Thanking them frequently and profusely for their participation in the training.

2. Creating community and building personal connections -- among volunteers, between volunteers and volunteer manager, between volunteers and staff who are trainers/presenters.
   • Sitting in a circle
   • Including an icebreaker (such as the tapestry) in the opening of the training to give people a chance to learn something about each other
   • Creating a set of training guidelines with the group to establish mutual respect
   • Using the peer support model as the standard for interaction
   • Starting/ending each session with an opening/closing circle for everyone to check in/out on how they’re feeling
   • Using an opening/closing ritual each session such as lighting and extinguishing a candle
   • Having participants work in different small groups throughout the training
   • Using activities designed to create personal connections, such as support groups, peer counseling practice, cultural diversity experiences
Ways to Achieve the Primary Goals of Effective Volunteer Training

3. Creating opportunities for personal exploration, expression, and growth.
   - Using an icebreaker and other activities which provide opportunities for volunteers to explore and express their own values (such as the tapestry)
   - Doing guided visualizations in which volunteers imagine or recall an event from their own experience and share what they learned
   - Using case studies as opportunities for volunteers to explore what clients’ lives are like and what it might be like to develop a relationship with a client
   - Using small groups and support groups as opportunities for quieter people to express themselves
   - Creating activities which allow for exploration of people’s feelings about loss and other emotional experiences associated with your volunteer work
   - Using real plays rather than role plays to practice skills (where people speak about issues that are real and current in their lives rather than playing a role)
   - Using support groups during the training as a forum to encourage personal expression, exploration, and growth.
   - Focusing discussions on how people bring who they are as a person to the volunteer work they do
   - Using opening/closing circles at the beginning/end of each session.

4. Creating opportunities to explore the nature and rewards of service.
   - Having volunteers work on a client case study in small groups to identify the ways they could be of service to the client.
   - Using real plays in counseling skills practice (gives the listener an experience of the rewards of serving another by listening, and the speaker an experience of the rewards of being served).
   - Having a panel of clients and/or experienced volunteers talk about their relationships and the rewards of being of service.
   - Putting people in pairs to wash each other’s hands with a warm wash cloth.
Ways to Achieve the Primary Goals of Effective Volunteer Training

Page 3

5. Providing necessary information, skills and skills practice.
   • Presenting and discussing information, including using visuals such as flip charts
   • Using case scenarios (written by participants to apply material to their own work)
   • Discussing what works well in participants’ experience in small groups, then reporting in the whole group
   • Giving examples of how skills can be applied using role plays/real plays
   • Case studies (print, audio, video)
   • Providing handouts and other resource materials
# Helping People Learn
## Perspectives on Adult Education

**Page 1**

<table>
<thead>
<tr>
<th><strong>Traditional Education Perspective</strong></th>
<th><strong>Adult Education Perspective</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Teacher-centered: focus on what the teacher does</td>
<td>Learner-centered: focus on what the learner does</td>
</tr>
<tr>
<td>Knowledge is passed from the teacher (as the expert) to the learners, who are assumed to be novices in the subject.</td>
<td>Learners bring their previous experience with the subject and have valuable resources to contribute to the learning process.</td>
</tr>
<tr>
<td>Learning is presumed to occur when the teacher does a great job of presenting information. The learners’ role is largely passive and receptive.</td>
<td>Learning occurs when learners discover new knowledge, skills and attitudes by actively engaging in participatory activities.</td>
</tr>
<tr>
<td>The teacher determines what will be taught and how, based on his/her expertise in the subject matter.</td>
<td>Trainer and learners together determine what will be taught and how. (Needs assessment is conducted with all learners, or with a representative number.)</td>
</tr>
<tr>
<td>Curriculum is driven by &quot;outputs&quot; (pages read, heads counted, hours logged, books sold . . .).</td>
<td>Curriculum is driven by &quot;outcomes&quot; (learners’ ability to use new information, skills and attitudes to enhance their effectiveness)</td>
</tr>
<tr>
<td>Focus is on acquiring information.</td>
<td>Focus is on enhancing learners’ effectiveness in daily life.</td>
</tr>
</tbody>
</table>
Helping People Learn
Perspectives on Adult Education

Page 2

**Traditional Education Perspective**

Focus is on conveying a body of information which may or may not be useful and relevant to the learner.

The subject matter may be taught as an entity unto itself, without building meaningful connections to other aspects of learners' lives.

Learners are motivated to learn by external rewards.

Commitment to learning is enhanced by learners' paying attention and being receptive.

The teacher's voice is heard.

Learners' relationship is with the teacher.

**Adult Education Perspective**

Focus is on helping learners develop knowledge, skills and attitudes which are immediately applicable in their lives.

The content must be placed in a meaningful context of learners' current knowledge, interests, and needs. Learners need to understand how the content fits in "the big picture" of their lives.

Learners are motivated by internal rewards (such as understanding how the subject will help them in daily life).

Commitment to learning is enhanced by each person feeling respected and supported in taking the risks necessary for learning.

Learners' voices are invited and heard.

Learners have learning and teaching relationships with both the trainer and other learners.
## Helping People Learn
### Perspectives on Adult Education

**Page 3**

<table>
<thead>
<tr>
<th><strong>Traditional Education Perspective</strong></th>
<th><strong>Adult Education Perspective</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Learners learn from teachers.</td>
<td>Everyone (including the trainer) learns from everyone else.</td>
</tr>
<tr>
<td>Learners are accountable to the teacher.</td>
<td>Trainers are accountable to the learners.</td>
</tr>
<tr>
<td>Learners are usually graded by the ability to answer written questions. After grading, the learning is over.</td>
<td>Both learners and trainers continually assess learning, based upon demonstration of knowledge/skills/abilities. Throughout a class or learning session, it is the trainer's responsibility to work with individuals to ensure that learning is taking place.</td>
</tr>
<tr>
<td>Class and race are issues. Certain languages/vernaculars are privileged. Non-standard languages/vernaculars are corrected and frowned upon. Focus is on form.</td>
<td>All vernaculars are welcome in the classroom. Focus is on meaning.</td>
</tr>
<tr>
<td>The classroom is a place of the intellect, not a place for emotions or spirit.</td>
<td>Feelings and emotions can arise in the classroom, be addressed, and contribute to whole-person learning.</td>
</tr>
</tbody>
</table>
Assessing Your Training on Effective Adult Education Principles

Page 1

On each of the scales below, mark the point where your volunteer training falls between the two extremes. In general, the more to the right your marks are, the more effectively your training is applying the principles of effective adult education. (See the chart entitled "Helping People Learn" for additional information.)

<table>
<thead>
<tr>
<th>1</th>
<th>2</th>
<th>3</th>
<th>4</th>
<th>5</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Teacher-centered</strong></td>
<td><strong>Learner-centered</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Knowledge is passed from teacher to learners</td>
<td>• Learners’ experience and expertise is valued and invited</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Teacher is &quot;the expert&quot; with the &quot;right answers&quot;</td>
<td>• Learners learn by participating in experiential activities (case studies, role play, etc.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Learners’ build relationships with the teacher</td>
<td>• Learners build relationships with each other as well as the trainer(s)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Ways in which your training is already learner-centered:

Ways in which your training could be more learner-centered:
Assessing Your Training on Effective Adult Education Principles

Page 2

1  2  3  4  5

Learners are largely passive

• Learning happens by listening to the teacher

• Learners ask questions when they don't understand

• Teacher asks questions to determine learners' understanding

Learners are active

• Learning happens through mutual inquiry among learners and trainer(s)

• Learners and trainer(s) ask questions to deepen discussion or explore new areas

• Learners participate in activities which help them discover what they already know

Ways in which learners already participate actively in your training:

Ways in which learners could be more active in your training:
Assessing Your Training on Effective Adult Education Principles

Page 3

1  2  3  4  5
Goal is for learners to acquire information
• Material may be immediately useful or not
• Teacher does not connect material to other aspects' of learners' lives

Goal is to enhance learners' effectiveness
• Learners can apply what they learn immediately to their lives
• Trainer helps learners make connections to other aspects of their lives

Ways in which your training already enhances learners’ effectiveness:

Ways in which your training could enhance learners’ effectiveness more:

1  2  3  4  5
Focus is on the intellect
Ways in which your training already includes emotions and personal growth:

The focus is on emotions and intellect
Ways in which your training could include more focus on emotions and personal growth:
Assessing Your Training on Effective Adult Education Principles

Rewards for learning are external
• Rewards include good grades, stars, recognition
• Learners are motivated to “get right answers”

Rewards for learning are internal
• Rewards include enhanced self-esteem from becoming more effective
• Learners are motivated by learning and growing

Ways in which your training builds internal rewards/motivation:

Ways in which your training could build more internal rewards/motivation:

The teacher assesses learners’ progress

Learners and trainer(s) together assess learners’ progress

Ways in which learners already participate in assessing their own progress:

Ways in which learners could be more involved in assessing their own progress:
Peer Consultation Groups
Peer Consultation Groups

Learning Objectives

At the completion of this module, participants will be able to:

- Create and implement action plans for specific changes in their volunteer programs.

- Anticipate and respond to organizational factors that will be supports and barriers to these changes.

- Make maximum use of SNTI technical assistance time in order to increase program effectiveness.
Reflection #1

This morning, we have explored:

- The values which underlie being of service and give meaning to this work.
- The Shanti Model of Peer Support and the nature of the relationships it fosters.
- The SNTI "Lessons Learned."
- The SNTI Model of Volunteer Management.
- The assets and barriers in your organization which support or limit the running of your volunteer program.

Based on this material, how do you see your own strengths as an individual in your role as a leader of volunteers?

Based on this material, how do you see the strengths of your volunteer program as it is currently structured?

What new ideas do you have from this morning for building quality relationships with volunteers?

What new ideas from this morning do you want to incorporate in the structure of your volunteer program?
Reflection #2

This afternoon, we have explored:

- The organizational, programmatic, and relationship factors which encourage or discourage your volunteers from continuing with your program
- The ways in which volunteer retention influences every other aspect of a program and vice versa
- The relationship between screening and retention
- Alternative tools for creating an effective screening process
- Using the peer support model to screen out a potential volunteer who isn't appropriate

Based on this material, how do you see your strengths as an individual in retaining and screening volunteers?

Based on this material, how do you see the current strengths of your volunteer program in retaining and screening volunteers?

What new ideas do you have from this afternoon for building quality relationships with volunteers?

What new ideas from this afternoon do you want to incorporate in the structure of your volunteer program?
Reflection #3

This morning, we have explored:
- What makes quality relationships between you and the volunteers of value to you and your program
- How bringing who you are as a person to your work is a gift to volunteers and helps to build quality relationships.
- Using the peer support model to build quality relationships with volunteers
- The distinction between supporting and supervising volunteers, and when to move from support to supervision.
- The relationship and structural issues which can underlie challenging situations with volunteers.

Based on this material, how do you see your own strengths as an individual in supporting and supervising volunteers?

Based on this material, how do you see the strengths of your volunteer program in supporting and supervising volunteers?

What new ideas do you have from this morning for building quality relationships with volunteers?

What new ideas from this morning do you want to incorporate in the structure of your volunteer program?
Peer Consultation Groups

PURPOSE: To identify two or three specific changes you want to make based on the workshop.

To increase the likelihood of implementing new strategies and ideas in your program.

TASK:

Step one: Complete page one of the Action Plan worksheet (10 minutes). You may want to refer to the reflection sheets you have completed throughout the workshop.

Step two: Review your action plan with colleagues in your peer consultation group and give feedback to each other (30 minutes).

• You may want to exchange two types of suggestions: (1) how to make the changes you want and (2) how to deal with the organizational factors that may support and hinder effective implementation.

• Please designate a timekeeper to ensure that everyone gets his/her fair share of the total time.

Step three: Complete page two of the Action Plan worksheet individually (5 minutes).

REPORTS: No formal reports. A brief discussion of what the consultation process was like for you will follow the activity.

Note: Your action plan is part of the evaluation process for the workshop. We therefore need to collect them to make copies, and will return them to you within the next week or two. Please make sure your name and your organization's name are on your form.
Peer Consultation Groups

Participant Name ____________________________
Organization _______________________________
Phone Number ______________________________

Action Plan

INSTRUCTIONS: Please complete page 1 (questions 1-3) before you meet with your peer consultation group. You’ll complete page 2 after you have your group’s feedback and suggestions.

1. List three actions to enhance the quality of service and/or volunteer retention in your program (even if indirectly) that you would like to take as a result of this workshop.

   A.

   B.

   C.

2. Circle the action of the three listed above that you would like to take first.

3. List the resources/assets and the potential barriers to implementing this action in your organization or volunteer program.

<table>
<thead>
<tr>
<th>RESOURCES/ASSETS</th>
<th>BARRIERS/OBSTACLES</th>
</tr>
</thead>
</table>

Workshop Location: ____________________________
Action Plan

Page 2

INSTRUCTIONS: This page is to be completed after you meet with your peer consultation group so you can incorporate their feedback and suggestions in your responses.

4. Describe how you plan to accomplish your first action, incorporating how you will use the assets/resources listed in question 3 and how you will deal with any barriers to implementation.

5. How can SNTI technical assistance support you in accomplishing your action plan?
Peer Consultation Groups

Notes/Reflections/Rambling Thoughts
Peer Consultation Groups

Notes/Reflections/Rambling Thoughts
Peer Consultation Groups

Notes/Reflections/Rambling Thoughts
Peer Consultation Groups

Notes/Reflections/Rambling Thoughts
Bibliography
General

Books

Bradner, Jeanne H., *Leading Volunteers for Results: Building Communities Today*. Conversation Press, 1999. Bradner, an experienced and thoughtful community leader, shows how to inspire results-oriented volunteer efforts through ten key steps, including core values, a culture of success, and a framework that enables.

Campbell, Katherine Noyes and Susan J. Ellis, *The (Help!) I-Don't-Have-Enough-Time Guide to Volunteer Management*. Energize, 1995. Presents a step-by-step framework for creating a team approach to volunteer management. With this realistic, no-nonsense book, you'll learn how to map the boundaries of your job and clarify expectations; find administrative volunteers and put them to work in vital ways; and share ownership—and the work of the volunteer program with everyone in your organization. Includes an appendix of electronic volunteerism resources.


Ellis, Susan J. *From the Top Down: The Executive Role in Volunteer Program Success*. Energize, 1996. Addresses the top decision-maker's role in a volunteer program. It clearly illuminates the issues involved in facilitating a volunteer program's success, including developing a vision for volunteer involvement, addressing questions of policy, budgeting funds and other resources, staffing the volunteer program, assessing the impact of volunteer contributions, and dealing with legal, risk management, and insurance issues.


Little, Helen, *Volunteers: How to Get Them, How to Keep Them*. Panacea Press, Inc., 1999. Outlines 12 basic needs of volunteers and volunteer leaders and clearly explains how to meet those needs. Rich with examples and useful tools, this book is a quick read that you will find yourself referencing again and again.
Bibliography

McCurley, Steve and Rick Lynch, *Volunteer Management: Mobilizing All the Resources of the Community*. Heritage Arts Publishing, 1996. Offers a thorough examination of every facet of a successful volunteer program. An extensive bibliography, a list of organizations and Web sites, sample volunteer management policies, and numerous sample forms and worksheets are included.


Stallings, Betty, *Training Busy Staff to Succeed with Volunteers*. Building Better Skills, 1996. Today's manager of volunteers must take on the role of staff trainer. This book provides methods to build commitment to the volunteer program and guides you in the design of training sessions to enhance staff competence.


**WEBSITES**

[www.snti.org](http://www.snti.org) – Shanti National Training Institute's website which includes general information on our approach to volunteer management as well as special features for all past participants of our "In the Spirit of Service" workshop. Our aim is to create an on-line community for continuing networking and resource exchange among past participants.
Bibliography

www.energizeinc.com – Susan Ellis’ website (one of the leading experts in the field of volunteer management). Includes an on-line bookstore, extensive library of articles, a monthly "hot topic" article written by Ellis with opportunity to respond, links to conferences, associations (including a list of all the volunteer centers and DOVIAs in the U.S.), periodicals and other resources. Library includes articles and book excerpts on topics such as group leadership, executive and board roles, policy development, recruitment, risk and liability, training tools, the role of the director of volunteers, and supervision.

www.regis.edu/spsmann/dovia/ivan – Ivan Scheier has been one of the most instrumental and forward-thinking leaders in the volunteerism field for over three decades. Now in his 70’s, Ivan is sharing more than 700 pages of his innovative writings, most out of print and only available online.

http://www.serviceleader.org/vv/resources.html - information and resources to help organizations find and involve volunteers via online technologies. Also includes a wealth of resources on using the Internet to help manage volunteers.

www.merrillassoc.com/Topics/ - Mary Merrill, a volunteer management consultant, posts a monthly topic on volunteer management.

www.mapnp.org – Management Library. Community resource providing basic, how-to management information to non-profit managers. Includes a comprehensive selection of articles on volunteer management at www.mapnp.org/library/staffing/outsourcing/volunteer.htm. Also includes links and on-line discussion groups.

www.tmcenter.org/library/links.html – The Management Center Nonprofit Library. Resource for nonprofit management support in Northern California whose mission is to help nonprofit organizations achieve their full potential through effective consulting, training and information resources. Site offers programs, and on-line publications.

www.pfdf.org – The Peter F. Drucker Foundation for Nonprofit Management. The Foundation's mission is to lead social sector organizations toward excellence in performance. Offers conference proceedings, training, links to foundations and organizations, guides and resources, and publications.
Bibliography

http://www.cybervpm.com — Nan Hawthorne compiles considerable amounts of information about volunteerism and disseminates it through the Internet. Her Web site includes resources on volunteer management, training kits, information on how to subscribe to her volunteer management discussion list (CYPERVPM) and offers access to a chatroom where groups can schedule discussions.

http://www.pointsoflight.org — website of the Points of Light, a nonpartisan nonprofit organization devoted to promoting volunteerism through a network of over 500 Volunteer Centers. Assists in developing workplace volunteer programs, developing youth service programs and leaders, providing training for Volunteer Centers, providing products and services to volunteer management professionals.

www.casnet.org — website of the CASA (Court Appointed Special Advocates) program, but with a variety of resources which could be easily customized to any volunteer program, including generic volunteer policies, training materials, and resources on program management.

http://www.avaintl.org — website of the Association for Volunteer Administration, a professional membership association focusing on enhancing the competence of members and strengthening the profession of volunteer management. Publishes the Journal of Volunteer Administration and a quarterly member briefing. Also has a professional certification program and sponsors an annual international conference on volunteer administration in October.

www.volunteertoday.com — a monthly web magazine with articles on topics such as volunteer management and training, recruiting and retention, boards and committees, and news from the field of volunteerism. Also includes links to other websites and an on-line bookstore. Past articles are available in an archive.

www.e-volunteerism.com — "The electronic journal of the volunteer community" — a new, quarterly e-journal with a subscription fee. First issue published Fall 2000. Includes feature articles, roundtable discussions, training designs, and commentaries by volunteer experts, all interactive so readers can respond and add additional materials.
Recruiting Volunteers

Ad Council – Engaging the Next Generation: How Nonprofits Can Reach Young Adults. This manual and executive summary are available on the Ad Council's website, www.adcouncil.org. Topics include "What Makes Young People Volunteers or Non Volunteers?" and "How You Attract Volunteers."


Ellis, Susan J., The Volunteer Recruitment Book. Energize, 1996. Susan Ellis has literally crammed this book with every suggestion and recommendation on the subject of recruitment developed over her 20-plus years in the volunteer management field. She first shows how to design the best assignments for volunteers as the initial step to recruit the most qualified people. What follows is a wealth of information on topics ranging from how your organization's image affects your success in recruitment to where to look for new volunteers, including your own backyard.

Screening and Legal Issues

Books

Graff, Linda L., Beyond Police Checks: The Definitive Volunteer and Employee Screening Guidebook. Dundas, Ontario, Canada: Linda L. Graff, 1999. Beyond Police Checks is a comprehensive "how to" manual on volunteer and employee screening. This definitive new resource helps employers understand screening responsibilities and provides specific details on how to carefully choose screening methods matched to the requirements of any given position.

Bibliography


**WEBSITES**

[www.costelloandsons.com/nonprofit/volunteers.shtml](http://www.costelloandsons.com/nonprofit/volunteers.shtml) – Information on general liability, worker’s compensation, auto, and injuries, from the volunteer’s point of view, the nonprofit’s point of view, and the corporate point of view.


**Adult Education and Training**

**Books**


Newstrom, John W., Edward E. Scannell, *Games Trainers Play*. New York, NY: McGraw-Hill, Inc., 1980. The ideas contained in this book have been drawn from a variety of sources, and can be used as shown here or adapted to fit a variety of audiences and purposes. Useful source of icebreakers and community-building activities.

Pike CSA., Bob, Lynn Solem and Dave Arch, *One-on-One Training: How to Effectively Train One Person at a Time*. San Francisco, CA: Jossey-Bass/Pfeiffer, 2000. One-on-one situations create a solid bond between teacher and learner, facilitating quick instruction and effective content retention. You'll learn about the basic tenets of adult learning-and you'll get practical tips on keeping training participants focused.


Websites

- www.cgl.org - Center for Group Learning. Teaches how groups of people work and how they can work better. Offers group resources, mailing list, and information about group process.

Organizational Change

Books

Bridges, William P., *Managing Transitions: Making the Most of Change*, Perseus Publishing, 1991. This book provides a useful framework for understanding the psychological transitions groups and individuals go through in response to change. Bridges defines three phases: (1) endings (giving up the old ways), (2) the "neutral zone," (the awkward phase of being between the old and the new), and (3) beginnings (getting excited about new possibilities). Also includes strategies for supporting individuals and groups in each phase and in moving through the phases.

Websites

- www.thinksmart.com - The Innovation Network. Professional association whose mission is to assist and support members in their efforts to revitalize organizations through the powerful use of innovation, creativity and group thinking skills. Articles, links, self and organizational assessments, and discussion forums.
Bibliography

www.albany.edu/~kl7686/learniorg.html – The Learning Organizations. Internet based resource center focused on learning organizations. Offers online articles, resources, and bibliography.


Self-Care

Books

Remen, Rachel Naomi, *Kitchen Table Wisdom: Stories That Heal*. Riverhead Books, 1997. The author is a psychology oncology doctor and someone who has lived with Crone's disease for more than forty years. She brings her wisdom and compassion to these mini-stories of her work with those dealing with life threatening illness as well as to insights into the medical profession and her journey as a doctor and an evolving conscious human.


Vineyard, Sue, *How to Take Care of You, So You Can Take Care of Others: A Survival Guide for Human Service Workers and Volunteers!* Heritage Arts, 1989. The author's own brush with death due to "over-functioning" led to this most practical roadmap for wellness and balance in the lives of people who dedicate themselves to helping others. How to get and keep your life in balance through assessing and controlling responses to change; eight stress reducing techniques and five steps to becoming fully alive and health-filled.
Bibliography

Websites


Diversity

Books and Articles


Websites

http://www.managementhelp.org/cmp_well/diversity/diversity.htm – a variety of articles on valuing and managing diversity

http://pertinent.com/pertinfo/business/yaticom.html – valuable general background article on communicating across cultures.

http://www.casanet.org/program-management/diversity/index.htm – a wonderful collection of articles on becoming culturally competent, recruiting volunteers, cultural sensitivity in your program and publications, and CASA’s diversity policy.
Volunteerism

Books

Silver, PhD., Nora and Margaret Melsh, *Positioning the Profession: Communicating the Power of Results for Volunteer Leadership Professionals*. San Francisco, CA: Association for Volunteer Administration, 1999. The following materials have been developed to provide practitioners with effective messages to describe our work to others in the volunteer field, to our organizations' executives and governing boards and to our funders.

Websites

www.ccp.ca/imagine/ - Includes several articles on corporate volunteering. Imagine produces resources and provides services that help businesses and charities build effective partnerships and is internationally recognized as one of the most successful programs of its kind in the world.

http://usinfo.state.gov/usa/volunteer/ - U.S. Dept. of State website which includes a comprehensive series of articles on the expanding role of volunteers in the United States today, as well as a variety of links to other resources.

www.iap2.org - International Association for Public Participation (IAP2). Nonprofit association of members designed to promote and improve the practice of public participation. Offers events, conferences, publications, and communication technology.

Surveys on Volunteering


www.nsgvp.org/nr5-bc.htm – Canadian survey on volunteering and giving.

Community Building

Books


Websites

www.fullcirc.com/community/ - Although not written for volunteer managers, provides a wide range of materials on fostering "online community." A nice tool for enhancing volunteer community.


www.oac.uoguelph.ca/~pi – Participatory Initiatives. Materials and sites on participatory development. Provides articles, tools, e-mail discussion lists, online resources, and organizations and networks.
In the Spirit of Service
Participant Manual
Supplement—Day 3

Sponsored by
The California Wellness Foundation

“In the Spirit of Service” Participant Manual Manual
Shanti National Training Institute
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Overview

Learning Objectives

At the end of this session, participants will be able to:

• Modify the SNTI model of volunteer management to suit the needs of their programs and volunteers.

• Make deliberate, appropriate choices about the changes they want to initiate, based in the core values of their programs.

• Communicate the model and desired changes in a manner that generates buy-in from other stakeholders (volunteers, other staff, etc.)

• Identify the first/next steps in making the desired changes in their programs and develop/implement plans for accomplishing them.
Overview

Successes/Accomplishments

- Putting values into practice

- Enhancing the quality of relationships

- Making program structures more values-based
Overview

Workshop Guidelines

Keep confidentiality.

Be on time.

Take responsibility for your own learning.

Listen, speak, and act from the heart.

Respect our differences.

Experiment with new ideas.

Have fun!
Changing
Successes in Communicating

Dyad Discussion

Step One: Think about a conversation you had after the workshop in September with someone who got really excited about your experience and/or the SNTI model. Tell your partner the story of that conversation - how did you feel starting it, what did you say to start it, how did the other person express his/her excitement, how did you feel at the end?

Step Two: Reverse roles so the second person gets to tell her story

Step Three: Make a list of what worked well for both of you in conveying your excitement about the SNTI Model/your experience to your listeners.
Best Practices for Sharing the SNTI Model

Notes
Levels of Change in Organizations

Demonstration

- Individual

- Interpersonal

- Organization
Appreciative Inquiry
Notes

Ask positive questions – what gives life to your experience?

Identify what’s working

Clarify desired images of the future

Design needed structures to move you toward desired future

Plan and implement specific projects/steps

"Be the change you want to see in the world"
—Mahatma Gandhi
Demonstration of Integrating Appreciative Inquiry and the Peer Support Model

Observer's Checklist

What examples of the underlying philosophy of the peer support model did you see or hear?

What examples of peer support model skills did you see or hear?

What examples of positive questions did you hear?

How did the speaker refocus "negative" comments or questions from the listener?

How did the speaker engage the listener in conversation about his/her desired images of the future?

How was the speaker "being the change" he/she wants to see in the world?
Adapting
Case Example

What's the experience you want volunteers to have in your program?

What underlying values will support you in creating that experience?

Given that desired experience, how would you characterize a "quality relationship" in the context of your program?

What is the appropriate gauge for the screening, training, and supporting/supervising structures in your program?

How can you create values-based structures for your program that both express your underlying values and support the creation of quality relationships?
Small Group Discussion
Instructions

Purpose: To clarify your desired image of the future for your volunteer program and the changes that will move you toward realizing it.

Task: Following the format of the case example we've just discussed in the whole group, explore your answers to the questions on the following page with each other.

Process: Small groups of three. Decide how to allocate your time so everyone gets a chance to speak.

Reports: You will be invited to share insights or ideas you gain from this discussion with the whole group.
Small Group Discussion Worksheet

What's the experience you want volunteers to have in your program?

What underlying values will support you in creating that experience?

Given that desired experience, how would you characterize a "quality relationship" in the context of your program?

What is the appropriate gauge for the screening, training, and support/supervision structures in your program?

How can values-based structures for your program both express your underlying values and support the creation of quality relationships by your definition?