

Volunteer Performance Review Tips

Format:

- Set semi-annual meetings for staff
 - Should be at the same time for all every year (ex. July & December)
 - In the weeks leading up to these review meetings, send reminders to the staff and ask that they complete their own self-evaluation 1-2 weeks prior to their meeting.
- Start at 45 minutes per staff member
 - As the process becomes more consistent, you may find that the mid-year review may need more time to allow for coaching/guidance on areas for improvement. Try to keep both meetings at 60 minutes or less.
- Include the Managers in the review meetings for the team that they manage
 - In addition to asking the staff to complete a self-evaluation, the Managers should complete an evaluation of the volunteers they manage
 - Program Manager to hold with Site Coordinators
 - An eventual goal may be to turn over all volunteer review responsibilities to the Managers and hold separate meetings with the Managers one-on-one to review the results

Level-Setting:

- Set expectations for performance early
 - Include as part of the on-boarding process with new hires; make sure they understand their role & responsibilities
 - For existing staff, consider using a one-on-one session to review role & responsibilities. Ensure expectations are clear, and if roles change/flex during the year, discuss the changes and any performance measures that accompany the change.
 - Communicate that staff will have the opportunity to complete their own self-evaluation ahead of the performance review meeting
- Consider annual performance planning with staff at the beginning of the year
 - Incorporate the goals of the organization & how each individual's role impacts these goals
 - Include the individual goals for each staff
 - This should provide a baseline for the mid-year and annual reviews; there is a measure for accountability
- Provide a copy of the review document to all staff at the onset; everyone should know the criteria being used for evaluation
 - When sending out the copy, try to include some general info & highlight that individual meetings will be held to go through performance criteria & expectations in more detail
 - **Example:** We will begin conducting semi-annual performance reviews beginning in July (annual review in December). Attached is the performance review document that will be used for each session. I will meet with each of you individually in the coming

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weeks to go through this performance criteria and expectations in more detail. Let me know if you have any questions.

Dialogue:

- Set a tone with a clear message
 - For the high performing worker, concentrate on things the person has done well
 - For the marginal worker, offer support initially and investigate in to what motivates them and what could be done to improve their performance going forward.
- Be a constructive coach. After discussing the strengths, achievements, etc., ask them how they feel about how things are going.
 - What is the staff member doing now that is not working?
 - What are they doing that is highly effective?
 - What actions could they adopt to be more effective?
- Give specific advice and target praise
 - **Example:** Don't say something such as: "You need to be more proactive". Try instead something more directive such as: "You need to take more initiative in calling potential donor leads."
- Discuss ideas for development and an action plan
 - This should focus on the future
 - What goals & plans does the individual have for their career? Do they align with the plans of the organization?
 - What coaching is needed? Are there additional skills or experiences needed for the individual to accomplish their career goals?

Wrap-Up:

- Summarize the performance review conversation & express support
- Recap key discussion points
- Ask the staff member to give you some feedback
 - **Example:** What can I do as a manager to make your work easier? Am I providing enough and/or the right support? Do you have any suggestions on ways that I can improve as a manager?
- Agree on actions to be taken by each of you
 - These do not need to be a long list of items but could include coaching items, stretch plans for continued development, or actionable items for improvement.
- Thank the staff member for their participation
- Consider maintaining a file for each staff member where you can summarize and keep notes from each meeting
 - When possible, follow-up each session with an email to the individual staff member recapping the discussion, accountabilities, and any next steps/expectations

Additional Tips:

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- Be present & limit distractions
 - Close email; do not answer phone calls, etc.
- Come to the meeting prepared – make sure to have read through the individual’s self-evaluation (and if applicable, the other Managers evaluation of that staff member)
- Consider providing employees a copy of their completed performance review prior to the meeting – this allows them time for the initial emotional response in private