

# A Few Pointers On the Unpleasant Topic of Firing Volunteers

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One of the greatest fears of those not experienced in working with volunteers is the misconception that volunteers cannot be fired. Although firing or removing a volunteer is the clearly not a desirable task, it can be done, and indeed at times must be done. Furthermore, the staff and the other volunteers serving your organization deserve a to be part of a work environment that honors good performance and addresses problematic situations. All of us are devalued when the behavior or performance of another person, even a well-meaning volunteer, is allowed to continue unchecked and unaddressed. For the good of the program and the morale of all the workers, problems must be addressed. However, just as human resource managers should have systems in place to address this possible eventuality, so to should the manager of volunteers.

## What leads to volunteer dismissal?

Before a brief review of the systems necessary to guide the process, let's look at the reasons for letting a volunteer go. Generally dismissal is a response to one of three areas of concern: performance problems, conduct problems, or economic problems. Performance problems generally relate to the quality of work, the quantity of work, the timeliness of the work performed, or the rate of improvement on a given work-related task. Conduct problems relate to behaviors such as the volunteers attendance, dependability, and generally acceptable work behaviors such as honesty, and sobriety. Economic problems can also apply to the area of volunteerism. Although it may seem counter-intuitive, an organization that has experienced significant fiscal cuts resulting in staff lay-offs may not have a sufficient number of supervisors to facilitate the work of volunteers, or entire programs may be eliminated. In situations such as these volunteers too may fall prey to the same fiscal shortfalls that reduced the salaried workforce.

All of these issues should be addressed in the guidelines that govern the volunteer program. Conduct and performance problems should be considered and addressed via the volunteer's job description, and in the orientation and training provided to volunteers. Effective supervision should spot and address shortfalls before they grow into problems. Internal communications should be alerting all those in the organization to pending economic difficulties. In short, a well-managed program generally addresses most performance issues and should catch the vast majority of concerns before they develop into disciplinary nightmares.

## What procedures should be in place?

Every agency should have in writing the behaviors that will simply not be tolerated under any circumstance. These are the behaviors that would result in immediate dismissal. Such behaviors may include entering the workplace with a firearm, loaded or not, regardless of any firearms license procured by the worker; coming to work under the influence of drugs; physical violence or threats; theft; or any other equally grievous behavior. These guidelines should be the same for both the salaried and the nonsalaried workforce. Again, this information should appear in the volunteer handbook and are generally reviewed in orientation sessions. Some agencies may include them in a contract that all volunteers sign.

In addition, your agency should outline a disciplinary process. Most processes involve a graduated process moving from verbal warning, to written warnings, suspension and finally dismissal. Each stage of such a process should involve a supervisory meeting where the behavior or the performance problem is addressed and an improvement plan is outlined. Critical to the success of the improvement plan is the thoughtful follow-up at designated intervals to review progress. In most cases the verbal warning and initial supervisory session is sufficient to correct the problem. In more intractable situations, the director will find that additional steps must be taken.

If your agency or organization has a human resources office, you would be well advised to meet with your personnel manager and pattern the system you develop for volunteers to parallel the employee grievance system.

## But what if you actually have to fire a volunteer?

James Autry, in his wonderful essay "The Caring Confrontation" concludes that "there's just one way to fire someone: with love and support and deep, deep regret. You must try as much as possible to make the act itself a caring confrontation." (p. 113, *Love and Profit: The Art of Caring Leadership*). With this in mind, one ought never fire someone when you are angry, or emotionally upset; without (if at all possible) having worked through your grievance process with great care and attention; and finally without a third party available to witness the exchange. While firing an employee is far more likely to be litigious than firing a volunteer, firing a volunteer is tantamount to telling the person that the "gift" of him or herself made to your organization is not sufficient.

So if you find that you must ask a volunteer to leave, here are a few guidelines, based in part of the work of Steve McCurley and Sue Vineyard (see bibliography) that should assist you with this caring confrontation:

1. Schedule a meeting with the person, in a private setting.
2. Be prepared. The time for counsel is long past. The person is likely not going to be happy with anything you say. This is not a time for winning friends. There is nothing left to debate. Rather, plan what you are going to say, possibly script your comments, and stay on task. Preparation also includes informing your supervisor of the situation, and the rationale for the action.
3. Have a third person in the room with you, preferably someone of the same sex as the person being terminated. This person does not need to say anything and serves as a witness to the situation.
4. State the reasons for the termination and present them in writing. Allow the person to sign the document indicating they understand what is being said.
5. Focus any comments on the performance and avoid personal issues or value comments.
6. Discuss any recommendations for future volunteer work with the person. This may include whether and under what conditions the person may return and volunteer at your agency.
7. Secure the return of any keys, parking passes, name tags, or other work-related items from the person before you conclude the meeting.
8. Current personnel practices generally include escorting the person from the premises following the meeting.
9. Do everything you can to stay calm. In addition to staying calm say only what needs to be said and nothing more. It is easy to start talking excessively when nervous and this could lead to confusion, mixed messages or incorrect interpretations of your actions.
10. Document the meeting. If possible, have your witness sign your report.
11. Be sure to exercise damage control. If the volunteer has friends among other volunteers you may want to let his or her friends know that the volunteer will not be returning. Although you must protect the confidentiality of the person let go, you also want to stem the tide of gossip and mis-information.
12. Do not provide a positive letter of reference for the fired volunteer.

## Where can you find additional information on this subject?

In addition to attending conferences and workshops where this topic may be addressed, you can also look to these resources for additional information:

- Marlene Caroselli, *Hiring & Firing: What Every Manager Needs to Know*, SkillPath Publications: Mission, KS. 1993.
- Linda Graff, *By Definition: Policies for Volunteer Programs*; GRAFF AND ASSOCIATES: Dundas, CA. 1997.
- Jarene Frances Lee and Julia M. Catagnus, *Supervising Volunteers: An Action Guide*, ENERGIZE Inc:Philadelphia, PA, 1999.
- Marilyn MacKenzie, *Dealing with Difficult Volunteers*, VMSystems: Downers Grove, IL. 1998.
- Steve McCurley and Sue Vineyard, *Handling Problem Volunteers*, VMSystems: Downers Grove, IL. 1998.

Most of these resources can be found at [www.energizeinc.com](http://www.energizeinc.com)



## Yes, It Is OK to Fire a Volunteer!

Posted on [February 12, 2008](#) by [VM Editor](#)

by Jodi Freedman

Many times, I have had the conversation with staff and with fellow board members about whether or not a volunteer can be fired. I find it frustrating how many people believe the answer is no. I often hear people talk about the philosophical dilemma "They are giving of their time, who are we to say that it is no longer acceptable or necessary?" I believe that if volunteers aren't treated equally to employees, and seen as your non-paid work force with similar guidelines, then you have put no value on your volunteers. Steve McCuley states "By denying that there is a 'right' and a 'wrong' way to do a volunteer job, one conveys the impression that the volunteer work done is irrelevant and insignificant. An agency which does not care enough about the work done by volunteers to enforce quality communicates to other volunteers that the agency believes their own work to be meaningless." For more of Steve's input on the subject, see his article "[How to Fire a Volunteer and live to Tell About It.](#)"

It is not a fun task, by any means, but letting volunteers go due to poor performance, poor attendance or a change in the organization's needs lets everyone know how important the volunteers are. Of course, to do this, volunteer managers must have proper guidelines in place. It really always goes back to proper documentation. A new volunteer should be orientated, given a position description and a handbook, and properly supervised. All of this should be documented so that all involved knows it was completed. If you have laid out the rules ahead of time, then termination shouldn't come as a surprise. I have often found that when I do let a volunteer go, that volunteer is as relieved as I am. Perhaps a person agreed to volunteer and then discovered that it wasn't what he expected or that she wasn't comfortable after all. Having an honest and open conversation often allows that volunteer to "save face" and leave on good terms with the organization.

Letting a volunteer go also signals to staff that volunteers are held to strict guidelines and are expected to make staff's lives easier, not more difficult!

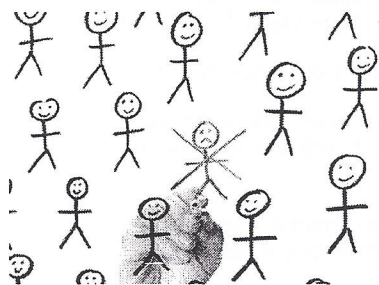
I am not saying that a volunteer should be let go without some effort to make the situation work. Steps may include relocating to a new department, getting a new task to do, coaching, or a new supervisor. So, what do you all think? Is it ok to fire a volunteer? And if yes, how many times should the volunteer manager try to make it work?

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# When it's no longer working: How an organization can gracefully exit from a volunteer relationship

Written by: Brock Smith

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A little over a year ago, the executive committee of the provincial sports organization that I work for decided it was time to shift gears in a very significant manner: plans were put in place to change the organization's board from an operational-based model to one that would be governance-focused, and as a result, the ten-person board would shed two positions when current terms expired.

On the surface, this change wouldn't deeply impact the organization's typical volunteer. Coaches would keep on coaching. Managers would keep on managing. For the bulk of the sport's volunteers, the earth would continue to spin unchanged around the proverbial sun.

However, this change would be felt the strongest by the organization's most dedicated volunteers. This particular organization had employed an operational board model for well over fifty years, and many of its longest-serving board members – some of whom had held their positions for more than a decade – were deeply involved in the developing the organization's programming.

I knew it would be no easy task to let these volunteers know that after many years of dedicating their time (and being used to calling many of the operational shots), their services would no longer be needed in their present capacities.

I told my executive director that I certainly didn't envy his task of sitting down with these board members – individuals who brought decades worth of volunteer clout to the boardroom table – to explain that their roles were about to be altered.

My ED responded by giving me a great lesson in volunteer management. He knew that while some board members would likely abhor the changes and step down, others may embrace the new direction, and that each board member deserved their chance to speak their mind before any formal change was put into action.

"Two-way communication is the key to healthy volunteer management," he told me. "And while I won't enjoy breaking the news to them, it's the only way we can develop solutions that work best for everyone. After all the time they've given us, these volunteers have earned that right."

There is no easy way to for an organization to gracefully exit from a volunteer relationship. But based on the expertise of two consultants with over fifty years of combined volunteer management experience, there is a right way to go through the process.

## "Head vs. Heart"

**Donna Lockhart**, a partner and consultant with the [Rethink Group](#), succinctly describes the sector-wide sentiment shared by volunteer coordinators when it comes time to end a volunteer relationship with one of their volunteers.

"I think in our field, because we are the 'nice folks', it's really difficult to sit down with a loyal volunteer, and let them know that their role with the organization has to change," she says. "We've built a relationship with the volunteer, and to come to a situation where the volunteer's performance is no longer meeting the needs of the organization and a change needs to occur, it makes for a very tough situation."

When these situations occur, volunteer coordinators often find themselves treading a fine line. On one hand, they've rightly trumpeted the importance of volunteering when they recruit: the health, social, and even physical benefits. But now, on the other hand, they're being asked to seemingly play the villain; to let go of a loyal volunteer who has given



their time and passion to the organization, but now, due perhaps to age, health concerns, or physical setbacks, can no longer complete their assigned tasks. Denying volunteers the right, or the privilege, to volunteer just doesn't seem to fit in with the identity of nonprofit organizations.

And yet, from time to time, it still must be done.

"Volunteers often feel a real connection to an organization based on commonalities, and that organization can become almost an emotional support to the volunteer, where the organization means more to the volunteer than the volunteer means to the organization," says **Lori Gottlieb**, the founder and president of [Lori Gottlieb Consulting](#). "At the beginning and end of the day, the correct mantra is 'volunteers are there to enhance and support the goals, the mission, and the vision of an organization.' When it starts to flip, that's when you start having problems."

While it will be difficult to overcome, Lockhart urges volunteer coordinators to use their "heads over their hearts."

"Understand that the volunteer is there to deliver a service to their nonprofit," she says. "If that service isn't being delivered in the way it should, then the nonprofit suffers. In the end, you have to find the right volunteers to deliver that service."

Still, while the "head" has to prevail, that doesn't mean that the "heart" has to be discounted entirely. The "heart" is what can turn a good volunteer coordinator into a great volunteer coordinator, and correctly ending a volunteer relationship requires quite a bit of it.

### Defining the role of the volunteer

Letting a volunteer go isn't easy, but it is easier to do if the responsibilities of the volunteer are well-defined within organizational policies and procedures.

"Volunteers need to know the expectations of the position before they even start, because that's what volunteer coordinators can fall back to later on," says Gottlieb.

Risk management also needs to be taken into consideration, with volunteers receiving proper orientation, training, and documentation when they begin their position.

"There should be handbook or a guidebook in place – something that lays out expectations – so that if a volunteer crosses the line, dismissal can be made easier," she adds. "That way, the coordinator can direct the volunteer exactly to the policy or procedure that they've broken."

Lockhart agrees, noting that this is an area of the nonprofit sector that needs improvement across the board.

"Many volunteer managers I've spoken with are coming to realize that their organization's volunteer descriptions need to start including things like performance measurements," she says. "We can then use that as a tool to have some measure of when a volunteer's performance isn't up to speed."

"This way," she notes, "the dismissal of a volunteer can't be perceived as a knee-jerk reaction or unfair decision by the organization. It serves as an indicator."

### Gathering the right information

Even before entering a discussion with the volunteer in question, it's important for volunteer coordinators to collect all the proper facts and documentation prior to making a major decision.

This is especially pertinent for larger organizations, such as hospitals, whose volunteer pools can often swell to many hundreds, or even thousands, of people.

"Volunteer coordinators at larger organizations don't physically have the time to meet with all of their volunteers," says Lockhart. "They're not supervising every volunteer to know if there's a performance issue, often until it's a bit of a crunch."

In order to remedy this, Gottlieb calls on volunteer coordinators to check, and then double check, that they have all of their facts straight before jumping to any conclusions regarding dismissal.

"Make sure there is proof that they're unable to meet their expectations, and that you're not just relying on hearsay," she warns. "Take the time that is required, and if the volunteer in question has been loyal to your organization for many years, they deserve your full attention before any decisions on their future are made."

Though focused at larger organizations, the same principles should be followed by smaller organizations, especially those that employ volunteers who donate their time in other parts of the province or country from where the organization is based.

"Even at smaller nonprofits, like those that bring someone in to run workshops in different cities, it's important to check in on performances, and to keep as up-to-date as possible," says Lockhart. "By having as much information as you can, the inevitable 'dreaded conversation' will be much more understandable for the volunteer."

### The "vital step": Two-way communication

When the decision has been made to end a volunteer relationship with a loyal volunteer, Gottlieb says there should be no wading around the issue at hand: "You have to meet face-to-face."

Though a face-to-face meeting may seem daunting, there are ways to make the process more comfortable for both parties. Gottlieb recommends that a foundation of two-way communication should be established between volunteer coordinators and their volunteers, with face-to-face meetings occurring well before any crisis point is reached.

"I realize that time often comes at a premium in this industry, but if managers of volunteers could sit down with their volunteers every three to six months, it wouldn't be a big shock to anyone down the road if volunteer performance wanes," she says. "If everyone is kept in the loop, then finding a solution can occur much sooner. It's a vital step."

Lockhart says that if a volunteer coordinator has concerns with one of their volunteers, the first face-to-face meeting should never result in ending the volunteer relationship.

"If the first in-person meeting is to let that volunteer go, these volunteers will be shocked and disappointed," she says. "After many years of having their loyal service, these volunteers deserve better treatment."

By engaging in regular communication with their volunteers, volunteer coordinators create a meaningful relationship with the backbone of their organization, which allows for honest two-way discussions to regularly occur.

With this foundation in place, volunteer coordinators can use the connection they've already built with a performance-suffering volunteer to gather input on the best way to move forward.

"Look at options, discuss the situation at hand, and work it out together, which is one of the greatest things volunteer coordinators can do," says Lockhart. "If two-way communication has been ongoing, the volunteer will likely be aware that they aren't meeting expectations, and they'll be much more willing to see if their role can change, or, if another role can't be found, more willing to accept that their time with the organization needs to come to an end."

When it comes to having the final discussion – the one that ends the volunteer relationship – Gottlieb says that it's important that coordinators don't beat around the bush.

"Don't use long words," she says, "and be clear and concise."

While volunteer coordinators need to be direct, they must also remember that this discussion must also follow the model of prior meetings; the conversation must flow both ways.

"This is about being honest, letting the volunteers have their say, but clearly helping them understand the reasons why the organization is going in this direction, and why the volunteer relationship no longer works," Gottlieb adds.

Once the volunteers are aware of the decision, volunteer coordinators need to recognize that volunteer's achievements, as well as firmly and compassionately commit to finding the best solution possible.

However, outgoing loyal volunteers deserve more than just a 'thank-you' plaque; they should be given their coordinator's attention as they make their transition away from the organization.

"Part of the volunteer coordinator's responsibility is to help their outgoing volunteers find new roles, if possible," says Lockhart. "They need more than just a handshake out the door and a kind letter from the executive director."

"After all of the work the volunteer has put into the organization, coordinators should reach out to their networks, and if it fits, try to find them a new role with another organization," she adds.

"There's no perfect scenario," says Gottlieb. "But being open and upfront, and engaging in that meaningful, two-way communication with the volunteer can mean all the difference between a sendoff that is respectful and a sendoff that is messy, and in every case, you want the former."

### The easy way vs. the right way

A few weeks after my initial conversation with my executive director, I asked him how it went when he broke the news to the board.

I found out that he had sat down with each individual board member, let them ask any questions they had, and in turn, he asked for their input on how they would like to proceed.



My ED's prediction was right. Some board members were irate, and stepped down before their terms were up. Others kept an open mind, and welcomed the change. Despite the varying opinions, he told me that there was one consistent reaction that was shared by all he spoke with.

"Regardless of whether or not the board members were frustrated or excited by the changes, they all were grateful that I took the time to explain everything to them, and gave them the chance to give me their two-cents," he said.

Although the roles of the board members would be changing over the next year, my ED firmly expressed to the board that he valued what each of them brought to the table, and urged them to work with him to see how they could best continue with the organization in a new capacity, to forge revamped volunteer relationships.

He was clear and concise. He requested input. He insisted that two-way communication was a priority, instead of autocratically thumping his chest and saying "this is how things are going to be, so you can either like it or lump it."

Like all volunteer relationships that need to end, these discussions weren't easy for my executive director. But the way he approached the process helped me to clearly see the difference between taking the easy route, and taking the correct route.

And by taking the correct route, my organization is now stronger for it.

*For a fantastic first-hand account of a coordinator (reluctantly) having to end a volunteer relationship with multiple long-serving volunteers, check out [Firing/Dismissing a Volunteer: Worst Part of Volunteer Management?](#), a blog by American volunteer management consultant Meridian Swift.*

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