PERFORMANCE REVIEW PROCESS WITH VOLUNTEERS

Many would see performance reviews for key Volunteers as being too much or too formal. Others are scared off because they feel they don’t have the skills or background to implement them or even introduce them to other Volunteers.

Another way to look at this as to see performance reviews as a reflection of the importance of the Volunteers who play key roles in our Centres/Clubs. It is an effective way of expressing appreciation, identifying issues and needs and holding both the Volunteers and the organisation to account.

Increasing numbers of Volunteers are looking to develop and enhance their skills through Volunteer work and welcome opportunities to receive constructive feedback and opportunities to reflect and develop further.

Initiating a Volunteer performance review process should be done sensitively and gradually taking into account any concerns Volunteers may have. Developing a self-assessment tool can be a good first step.

What is a Performance Review?

A performance review is a regular opportunity (usually 6 monthly or annually) to review how a Volunteer is tracking against a set of agreed outcomes. A good Volunteer Performance Review includes the following components:

- A written role description
- A mutually agreed set of outcomes for a particular role
- An implementation plan

The best performance reviews involve no surprises. Nothing the Volunteer hears in the review should be new to them if the person they are reporting to has done their job and given them regular feedback in the proceeding period.

How does it work?

The process can be formal or informal but it is important to schedule a time for it and then stick to it.

Before the session:

- Have the volunteer fill out a self-assessment of how they think they’ve done against the outcomes that were set
- Review the Volunteers role description, outcomes/goals
- Do your own evaluation on how you think the Volunteer has performed against the outcomes that were agreed.

During the session:

- Together, review the role expectations and outcomes
- Share positive feedback and appreciation
Invite the Volunteer to share their self-assessment and assessment of the support they have received in their role

Offer your assessment of the volunteer’s performance

Discuss the barriers to the volunteer’s current or continued success

Discuss future plans for the volunteer – what else they’d like to do, what development they might need etc.

**After the session:**

- Write a summary report for the volunteer’s file which both you and the volunteer sign off on
- Follow-up on actions and agreements

The self-assessment questions on the next page may be useful in shaping the conversation.