

## **BREAKING UP WITH DIFFICULT VOLUNTEERS**

*Wednesday, February 21, 2007 - Tiffani Hill, CVA*

As I sat down to write this article, it occurred to me that volunteer resources managers (VRMs) are laying the foundation to break up with a volunteer from the first moment they contact our organization. This is not how I want to view my application process. I want to think that everyone who calls or emails is perfect for the job, will have all the time in the world to do it, and will conduct themselves with so much professionalism that they will outshine any paid staff person. All of the paperwork, interviewing, orienting and training are just formalities.

Unfortunately, not everyone interested in volunteering is a great match for the organization. Often, they leave on their own. Sometimes, we have to force a goodbye. We call it “terminating service,” “dismissing,” “firing,” and “retiring.” What if the volunteer is a high-level donor? What if the volunteer is showing signs of mental illness? What if the person is causing so much chaos that you know they won’t go quietly? How do you gracefully break up with volunteers in these situations? What is the answer to most of VRM’s questions about managing volunteers? VRM’s must incorporate best practices in human resources management into their programs. Also, they should implement them with all of the heart that they bring to this profession. This article is going to remind you that the same applies to handling difficult volunteer firing situations.

I found myself in the very awkward position of having to fire two difficult volunteers and learning that the previous volunteer manager had not gone through all of the “formalities.” I was challenged to move forward both ethically and legally without a strong foundation to build on. Here are the stories and some suggestions about appropriate actions. All names have been changed to protect confidentiality.

### **One Made Threats**

“Cathy” had opinions about everything and let everyone know how she felt. Previous departmental leadership let the volunteer advisory council have so much latitude that they even decided on appropriate discipline for other volunteers. Cathy had taken this sense of authority and run with it. When a new department head came in, started making changes, including hiring me, Cathy let all of the staff, and volunteers know how upset she was that she wasn’t consulted. Also, she stated clearly that she would not conform to the new standards. She had friends at the local newspaper and would let them know how horrible our organization had become, especially in our attitude toward volunteers.

This relationship wasn’t working out. I tried to be positive with Cathy. I had lunch with her. I asked for her appropriate input. I even asked her help to train new volunteers. I spoke with her privately about how her conduct impacted our programs and that she would need to make a decision about whether or not she should stay. Finally, my supervisor and I decided that the only further action to take was to let Cathy go. We did briefly discuss what would happen if Cathy did get an article printed and decided not to worry about it.

My initial dilemma was that my supervisor, upon hiring me, had asked me to let Cathy go. Unfortunately, I couldn’t find any file on Cathy’s history with the organization such as an application, notes on any previous issues or conversations with her, or proof that we had cause to let her go. Ethically, I felt that I couldn’t fire her without going through the disciplinary steps outlined in our volunteer handbook. So, I had to start from scratch and document everything.

The timing became such that I had to fire Cathy on a morning when I was the only one in the office. My supervisor would not allow her to stay through one more weekend. I alerted the security guard that there might be trouble and am glad I did. After leaving my office, Cathy caused a commotion all the way to the front gate and out into the parking lot. However, no horrible story appeared in our local newspaper and we never heard from her again.

### **Major Donors Don't Always Work Out As Volunteers**

“Linda” was a major donor who had also been a volunteer for 18 years and was acting out her fears of and disappointment with changes that were being made. This happened simultaneously as the situation with Cathy both of which I had no idea about when I took the job. I was told that she had caused trouble off and on throughout the years. Of course, no one wanted to lose the many thousands of dollars Linda donated every year. However, her actions were causing serious disruption for other volunteers, who would pull me aside to let me know about her latest inappropriate comment or action. My supervisor wasn't the only one who wanted her gone.

Fortunately, I didn't have to “drop the axe.” It was decided that the best course of action would be to have the organization's director have the final meeting with her. She exited more gracefully than Cathy did. We were able to give Linda a more dignified out by announcing her retirement from volunteering and presenting her with a plaque at our next recognition event.

### **Lessons I Learned**

What did I learn from the experiences that led to my opening comment of this article? From start to finish, VRM's have to build a strong foundation for their volunteer programs. As leaders of volunteers, we have to walk the line between supporting our volunteers and protecting our organizations.

1. From the beginning of the relationship, complete the application and interview process with every volunteer. Even if you use a computer database, keep a paper file of everything that your volunteer signs, such as the application, volunteer agreement or release, handbook receipt, etc.
2. Throughout the relationship, keep a record of the volunteer's activity, both the good and the bad. If you meet them for coffee, note it in their file. If they earn recognition, document it. If you have to counsel them about an attitude, action or misunderstanding, write it down and ask any other staff that is involved to write it down in their own words, too.
3. If you outline disciplinary steps in your volunteer handbook, follow them. If you don't have them outlined, you really should. Why? It lets you off the hook (“I'm following procedure...”). It ensures fair treatment of all volunteers. Also, it makes sure you keep a record of what has happened.
4. It's okay to meet one-on-one with a volunteer to talk with them about concerns. VRM's encourage each other at conferences to do regular check-ins with their volunteers. However, if you are considering the possibility that you may have to terminate the relationship, you really should have another paid staff person present. By doing this, you will have a witness to the conversation in the event you need one.
5. You really shouldn't let someone go when you're the only one in the office. With such a confrontational volunteer, I should have been able to wait until a time when I could have another staff member with me. Actually, it's best to always have someone in the office with you if you are firing a volunteer, whether you expect him or her to act out or not.

6. If you can provide the volunteer with a better option, like retiring, try to do so. Consider creating the category of “Honorary Volunteer.” People can become inactive, by their choice or yours, and still receive your newsletter and invitations to recognition events.
7. Remember that volunteer information is to be respected, as you would want your own personnel information to be handled. It is unethical to disclose information to uninvolved staff members or volunteers about a disciplinary process you are going through. When I announced that Cathy had left the program, I did not say that she had been fired. If anyone besides my supervisor, the security guard and me knew what had happened, it was because Cathy had told him or her. It’s also not ethical to include volunteers in the disciplinary process unless you need them to make a statement about something they have witnessed.
8. Directors should be involved in any actions involving major donors or high-profile volunteers.
9. If the volunteer threatens some course of action, take note of it. Consider the possible consequences so that you are prepared. Remember, if you have crossed all your “t”s and dotted your “i”s, you can stand up to criticism. However, be sure to remember the issue of confidentiality when defending your position.

### **When an Illness Is Involved**

A colleague once asked me for some advice about breaking up with a long-time volunteer who was showing signs of mental illness. Even though she had spoken with the person, the woman kept showing up for what had been her assigned volunteer shift. In addition, the woman had become engaged in some unethical activity involving clients.

In addition to the above steps, I encouraged the colleague to seek the guidance of a professional who was experienced working with persons with such illnesses. I also encouraged her to send a certified letter to the volunteer, so that she had additional proof in writing that she had dismissed the woman and had let her know that her shift had been assigned to an active volunteer. When the situation involves an illness or other sensitive issue, you should take care to show your compassion. You should also remember that you represent your organization and are charged with protecting your clients. I don’t envy you if you face this situation.

### **Document, Document, Document**

Some of my co-workers would tell you that I am very obsessed with the details when it comes to volunteers. That’s okay. When push comes to shove, I’ll be able to assist them should we have to break up with a difficult volunteer. What’s my final word? Documentation!

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