

Managing Underperformance

When organisations think about managing underperformance, it is generally in the context of paid employees. However, it is important to consider how you will appraise the performance of volunteers and manage any underperformance in your volunteer cohort.

Many Volunteer Managers are responsible for both paid employees and volunteers, and some consistency in approach to both is important. It is important that your organisation goes through similar processes of setting expectations, providing ongoing feedback and ensuring there is a good fit for both the organisation and the volunteer. These steps are the backbone of performance appraisal and assist in circumstances where you may need to manage underperformance.

Performance Appraisal for Volunteers

Performance appraisal refers to a method by which job performance is documented and evaluated. Performance appraisal should be a constructive process that is applied to all staff, including volunteers, in an equitable manner and with a view to support their success in the workplace. Performance appraisal allows your organisation to set expectations and guide performance of volunteers, and address any issues in a timely manner through ongoing monitoring and feedback.

Effective ongoing feedback includes:

- setting goals and expectations
- monitoring performance, including both achievements and non-achievements
- listening and understanding – and making an effort to understand any barriers to performance
- constructive feedback that suggests ways to improve performance
- recognising positive behaviours

Ongoing performance appraisal may lead to the identification of performance challenges or gaps, or issues with conduct or behaviours that may, over time, require action on underperformance. Be mindful in your approach of performance appraisal of volunteers and consider what would be appropriate in the circumstances. For more in-depth, strategic, or high-risk roles you may have stronger performance appraisal mechanisms in place than for more general roles. It is important to weigh up the benefit of performance appraisal with the additional onus this will put on volunteers. The process should be balanced by the complexity of the volunteering role in question.

Managing Underperformance of Volunteers

Underperformance should be identified in a timely manner and constructive and proactive steps should be taken to address it.

1. Identify the issue

- Start by documenting specific examples of the volunteer not meeting expectations in performance or conduct and gather any relevant documentation.
- Write down why the volunteer's performance or conduct is an issue. For example, it may be affecting your organisation, other staff, clients or the safety of the workplace.
- Write down how the performance or conduct needs to change.

2. Assess the issue

- Before you meet with the volunteer, think about how serious the issue is and how long it has existed.
- Assess how wide the gap is between what you expect of the volunteer and what they are doing.
- Ensure you keep an open mind about possible causes of the issue.

3. Meet with the volunteer

- Discuss the issue with the volunteer as soon as possible - ignoring it is likely to make it worse.
- Arrange to meet in a suitable time and place, letting the volunteer know in advance what the discussion will be about.
- Allow the volunteer to bring a support person of their choice to the meeting if they want to (a support person's role is to support the volunteer during the meeting, not to speak or advocate for them).
- Clearly describe the issue, using examples, along with how it's affecting the organisation.
- Invite the volunteer to respond.
- Explore the issue and possible causes by asking open questions.

4. Jointly devise a solution

- Explore possible solutions by asking open questions - solutions may include updating the volunteer role or discussing a new role.
- Invite the volunteer to suggest solutions.
- Agree on a way to resolve the issue.
- Offer appropriate support (e.g. further training).
- Agree on a timeframe for your volunteer to improve their performance or conduct.

5. Monitor performance

- Make sure you follow through with any training or other support that you offer the volunteer.
- Monitor progress and provide ongoing feedback.
- If performance or conduct improves, acknowledge that the issue has been resolved.
- If performance or conduct hasn't improved, extend or repeat the process or consider ending the volunteer relationship. Ensure if you go down this path that the organisation has an agreed and documented process for ending the volunteer relationship and that the volunteer is appraised of this at the relevant time in the above process.

If your organisation is in a position where it needs to end a volunteer relationship, the Not-for-profit Law [National Volunteer Guide](#) provides further information on this.

Conclusion

Whilst formal performance appraisal processes are not ordinarily applied to volunteers, some degree of seeking and providing feedback and evaluating the success of the role for the organisation, volunteer and client will usually take place. If you find yourself in a position where you need to manage underperformance, always be mindful of the fact volunteers are choosing to give their time to your organisation. Any hard conversations should be entered into respectfully and with the goal in mind to reach a mutually beneficial outcome.