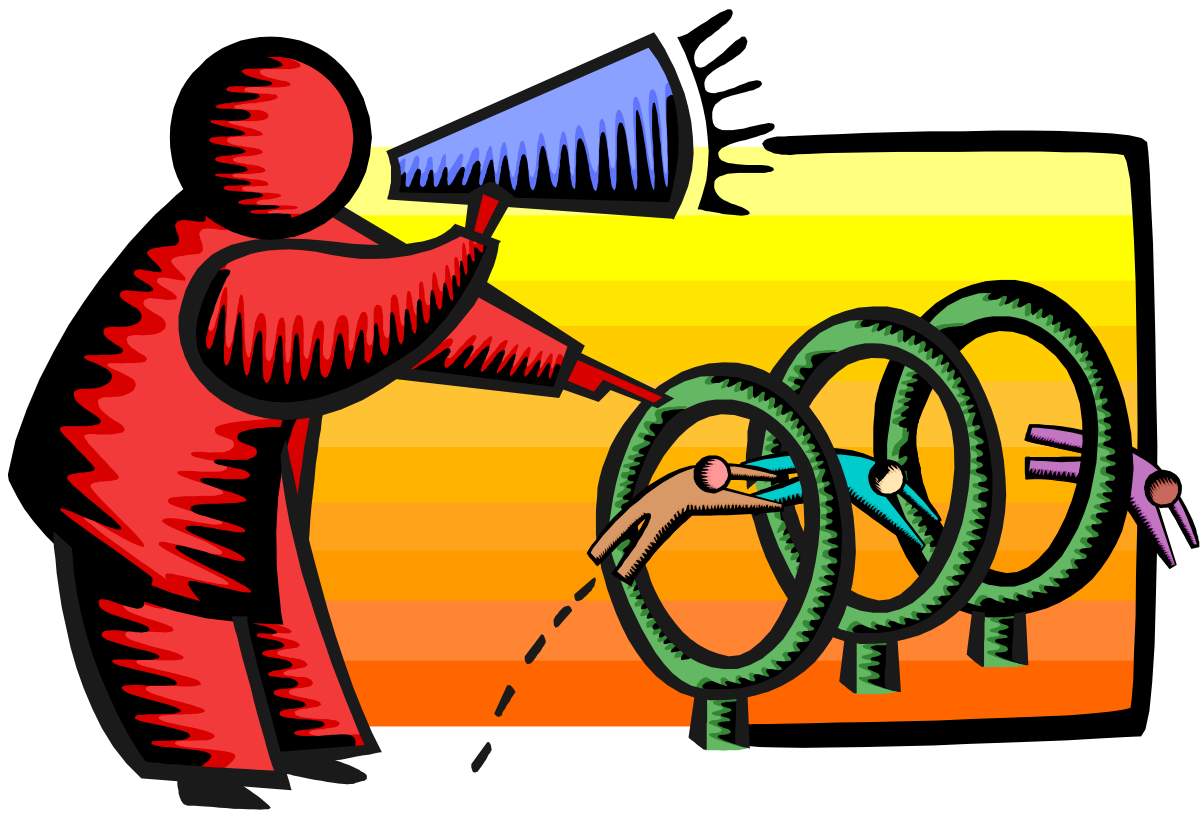


Establishing Position and Relationship Boundaries for Volunteers



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Why Good Volunteers May Choose to Do Bad Things

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John has been a volunteer with Meals on Wheels for seven years since his retirement. He came to the program out of a sense of restlessness and loneliness, but has found himself a home. He delivers meals on three days a week and has established many friendships along his accustomed route.

One day while he is delivering meals to Anne Johnson, a regular client, he stopped for a moment to ask how she is doing, since he has learned over the years that health problems due to aging have begun to afflict her. She says she is doing "fine," but that she hasn't been getting much rest because of a broken window shutter that bangs in the night wind, keeping her awake.

On his next meal delivery date, John showed up at Anne's house with his old box of tools, and proceeds to repair the shutter. Mrs. Johnson is quite pleased. John also is pleased by the results, and thereafter makes a point of looking for additional projects as he makes his rounds...

Eventually his program supervisor heard about his extra-duty activities and asked John about them, pointing out that Meals on Wheels isn't really in the home repair business. She told John that he will have to leave his toolbox at home or he will be suspended from his volunteer position. John is perplexed and disturbed. After all, he was just trying to help, wasn't he?

From a psychological standpoint, the act of volunteering is an interesting one, since it would suggest that the volunteer is acting without any self-interest, the classic altruist. In reality, however, the situation is much more complex, and as every Volunteer Program Manager knows, volunteers meet their own motivational needs through the act of volunteering. Occasionally, however, the strong urge to meet these motivational needs can conflict in strange ways with the operation of the volunteer

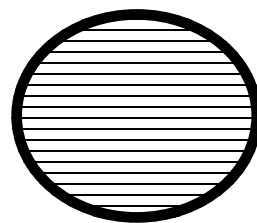
program, causing volunteers whose behavior is otherwise good, if not exemplary, to behave in seemingly destructive ways.

Diagramming Relationships in Volunteer Programs

Let's start by drawing some diagrams of relationships in volunteer programs.

Most volunteer programs begin with a client who has problems. These problems may range from internal conditions to external situations and they may be big and complicated or small and highly defined. At any rate, they create a state of "need" in the client. We can express this state of need on the part of the client by drawing a circle that represents the entire nature of the client and then imagining that one segment of it is a location where this sub-state of need exists:

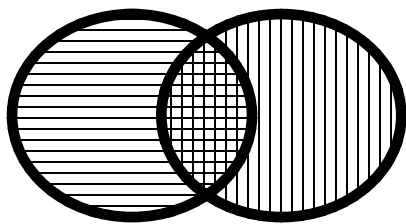
*Diagram One
Circle of Client Needs*



Social services agencies are created to address or solve these needs of this client. Usually the agency is not designed to solve all possible needs of the client, but is designed to address some specific issue, such as a need for hot food in the Meals on Wheels program or a need to enhance literacy in a tutoring program. In a sense the relationship that exists between the client and the agency can be diagrammed by drawing a second circle overlapping the first. In this diagram there is an overlap between the "need" of the client (to solve their problem or condition; to obtain help) with the "need" of the agency (to engage in meaningful work toward

achieving their mission).

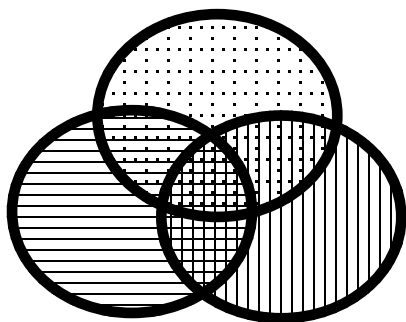
*Diagram Two
Overlap of Agency and Client Needs*



This area of overlap is what really creates the helping relationship between the two parties; it identifies the parameters within which they “need” each other.

Since social service agencies usually lack sufficient resources they often seek help in the form of volunteers. These volunteers have motivational needs of their own which tend to draw them toward particular causes or agencies and toward working on particular tasks with particular types of clients. The volunteers tend to identify with the tasks and clients and develop motivational satisfaction out of performing work to assist the agency and its clients. When you add the volunteer’s needs to our already diagrammed relationships, you get the following:

*Diagram Three
Overlap of Volunteer, Agency and Client Needs*



The areas of overlap actually represent the areas or ways in which complementary motivational needs are being met. The overlap between the agency and clients represents both the meeting of the client’s need for assistance and the agency’s need to

perform work. The overlap between the volunteer and the agency represents meeting the agency’s need for additional workforce with the volunteer’s need for association and meaningful work. As a general rule, the larger the area of overlap the greater the meeting of motivational needs and the deeper the attraction and bonding between the various entities.

To show you how this seemingly simple system can be used to explain “bad” volunteer behavior, let’s take a specific example.

The Misbehaving CASA Volunteer

One of our favorite volunteer programs is called Court Appointed Special Advocates. CASA is a program in which volunteers are recruited to serve as advocates for children who are enmeshed within the justice system, often because their parents are defendants in child abuse or neglect cases. The CASA volunteer looks after the interest of the child during the proceedings, providing an impartial representative whose sole aim is insuring that the best interests of the child are met.

The overall mission of the CASA program can be described best in the descriptive language utilized by its national organization:

A safe, permanent home isn’t something a child should only dream about. Almost half a million children in the United States live in foster care, meant to be a temporary haven. They have been removed from their homes, not because they did anything wrong, but because they’ve been abused or neglected. It’s frightening and confusing for these children to suddenly find themselves in the complex world of social workers, attorneys and judges, people who have the power to decide where they will live and whether they will go home or be freed for adoption. Sometimes, these children can spend years in foster care, waiting for those decisions to be made. With overburdened caseloads, a social worker may not have the time to give the thorough attention these children deserve. They may simply not have the time to listen. One judge had an idea to help these children find a way into safe, permanent homes

more quickly. His idea was CASA -- Court Appointed Special Advocates -- trained volunteers who would be appointed by a judge to speak up for the best interests of a child. Now, there are approximately 42,400 CASA volunteers helping abused and neglected children all across the country. But 3/4 of the children who need a CASA don't have one. You can help those girls and boys have a voice in court, and a chance at a future.

CASA volunteers tend to be highly dedicated to their work, capable of dealing with both the rigors and intricacies of our legal system as well as the disturbing treatment that has been accorded their young charges. They are subject to a rigorous screening process and receive extensive training on how to approach their volunteer work successfully. CASA standards provide minimum supervisory ratio requirements to ensure that adequate staff monitoring and support is provided for all volunteers.

They are, in many ways, among the most highly qualified and committed volunteers in the country. You might expect their behavior to always reflect these qualities. CASA strives to maintain high standards. It has, in fact, a set of national program standards, one of which relates directly to volunteer management. Among its edicts is the following:

The CASA volunteer does not engage in the following activities:

- *taking a child home;*
- *giving legal advice or therapeutic counseling;*
- *making placement arrangements for the child;*
- *giving money or expensive gifts to the child or family.*

These activities are prohibited because they conflict with the need for the CASA volunteer to maintain objectivity in representing the best interests of the child. The CASA volunteer is not intended to be a companion for the child, such as in a Big Brothers program, instead they are an advocate for the best interest of the child, and they need to maintain some distance in the relationship in order to maintain and demonstrate their neutrality. Doing so is vital both to

maintaining a good working relationship with the child and with maintaining credibility with judges, attorneys, social workers and others in the justice system with whom they work. Engaging in any of the prohibited activities can be grounds for discipline or even termination of the volunteer.

But if you talk with CASA volunteer managers you will find numerous examples of volunteers who are caught breaking these rules, usually through providing gifts to children or taking them within their own homes to provide a moment of safety and shelter.

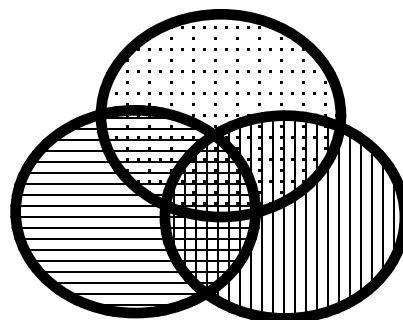
Why are these good volunteers consciously doing something that they know is "wrong"?

Why Good Volunteers Will Intentionally Break Rules

To understand this phenomenon, we have to go back to our diagram of relationships.

In a well-operating volunteer/agency/client relationship there is a balancing of motivational needs and interests:

*Diagram Four
Agency, Client, Volunteer Overlap*



Each party actually has a relationship with two other parties, both giving and getting something from the connection. In volunteer programs that match volunteers with particular clients, however, there seems to be an inherent tendency for this overlap to begin to stray, or to become unbalanced.

The volunteer who is assigned to work with a

particular client both needs to establish a relationship with that client in order to be successful. They must develop a sense of trust, liking, respect and bonding for the client, one that usually is reciprocal in nature. Volunteer and client must, in a sense, become friends.

Often the strength and attraction of this friendly bond between the volunteer and the client will grow to be quite strong over time, but in fact it can be very powerful even from the very beginning in volunteers who are highly motivated by the needs of the client group. A recent study done for CASA, for example, determined that a child involved in the CASA program would be likely to use the following descriptions about their relationship with the CASA volunteer who is assigned to them:

- “Always there for me; I wasn’t alone.”
- “Made me feel loved/special/important.”
- “Listened to me.”
- “Helped me get what I needed.”

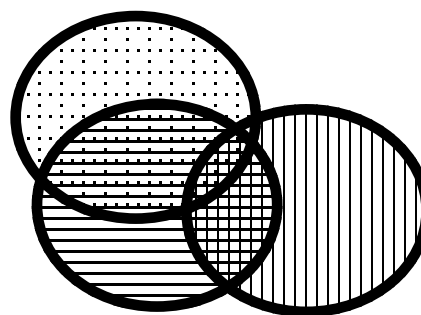
You will notice that none of these have anything to do with what a CASA volunteers actually “does,” i.e., provide objective representation for the interests of the child in court. Nonetheless, these descriptions are what the child feels and, most significantly, they are also what the volunteer sees and feels from the child. And, in many cases, they are what begins to dominate the motivational framework of the volunteer - the “need” to provide as much help as possible to the child and to provide it as quickly as possible.

In a sense, CASA creates the likelihood of this occurring by the very language used in recruiting volunteers. Volunteers are not sought because of their interest in mastering the intricacies of our legal system; instead, they are recruited because of their interest in helping children - “a safe and permanent home for every child.” CASA posters show pictures of appealing children, give examples of the pain and suffering they have felt, and are specifically designed to appeal to those who feel most compelled to provide help in creating happy lives for the child. The very people most likely to be highly motivated to volunteer to help the child by joining CASA are also the people who are most likely to eventually move

toward assisting the child in inappropriate ways, violating the boundaries of their volunteer position.

This shift is easy to “see” if we go back to our diagrams. What has happened is that the motivational overlap has become unbalanced, with the volunteer identifying more with child than with the agency and identifying with needs of the child that do not come with the purview of these services provided by the agency:

Diagram Five
Overlap Slippage among Agency,
Client, and Volunteer



The fascinating thing is that those volunteers who are the most dedicated and the most committed are the ones who are most likely to move in this direction. Their own high levels of motivation are what push them to break the rules. This problem is endemic in cases where volunteers are assigned to work one-to-one with clients, but it also exists in other programs such as in crisis telephone centers where volunteers often will give advice outside the parameters of the “approved” answers or in Meals on Wheels programs where drivers suddenly start providing new and different arrays of services to the clients. To each of these volunteers what they are doing, despite being directly contrary to agency policy, seems to be absolutely the “right” thing to do.

Keeping Highly Motivated Volunteers on Track

The unfortunate thing is that while what the volunteers are doing is needed and worthy it doesn’t conform to the limitations of the agency. Meals programs are not designed to do home repair. CASA volunteers are not mentors and companions. Sooner or later, straying outside the parameters of the

agency only results in problems for all concerned.

So how do you restrain these powerful and natural instincts of the volunteer without destroying their motivation to continue volunteering?

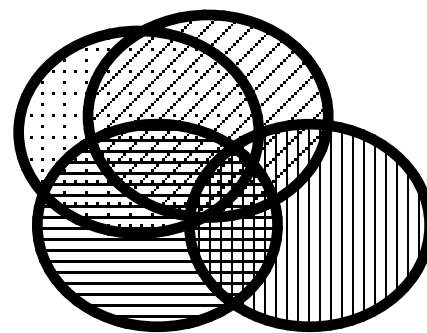
Here are tactics we can suggest:

1. Adopt and communicate to all volunteers a “non-abandonment” policy regarding client needs that they encounter that do not fall into the normal work of the agency. Urge volunteers to bring these needs to you and let them know that you will work to find some way of meeting the needs, usually through referral to another agency. Stress to the volunteer that the agency will not intend to “abandon” the client. It is crucial to maintain open communication with the volunteers regarding these issues, and it is equally crucial to get them to know that you are on the same side as they are - each of you wants to do what it takes to help the client. If a volunteer ever gets the impression that the agency doesn’t “care” about the clients they will be much more likely simply to act on their own and they will eventually be likely to stop volunteering for that agency.
2. Provide each volunteer with a clear explanation of why prohibited actions have been prohibited. Do not simply cite rules and refer to “policy.” Explain why the agency has chosen not to provide some types of services. There are two generally accepted reasons: that the agency isn’t capable of doing a good job in the area and that some other agency does exist to provide the help. You can also point out that in order to accomplish its specific mission the agency has had to make choices about the extent of coverage it can provide. The more volunteers connect to the “mission” of the agency the more likely they are to feel comfortable in keeping inside the boundaries of that mission and not straying.
3. Provide clear rules and procedures, with specific examples of prohibited actions, and build these into “what if” training scenarios for all volunteers. A volunteer is most likely to stray when they meet a new situation which has not been covered in any agency discussion; the volunteer will then tend to act on their own “natural” instincts. As you encounter

examples of volunteers “doing the wrong thing,” collect them and use them as discussion scenarios during orientation and training. Over time this will build a set of collective wisdom about “right action” that will tend to be emulated by new volunteers. In one sense, you can intentionally create an ethic of keeping within agency boundaries, telling stories of the volunteer who “resisted temptation” and who “did the right thing.”

4. Build a sense of personal connection and bonding between the agency and the volunteer that will counter-balance the relationship between the volunteer and the client. This can be done by making the volunteer feel like they are a “part” of the agency, including them in decisions, fostering their sense of identify with agency operations. It can also be done by developing personal relationships between staff and volunteers. One warning about this, however. The most common bonding occurs between the volunteer and their immediate supervisor, often the Volunteer Program Manager. A clear danger is created when this bond is severed by the departure of the staff person with whom the volunteer has bonded. In this all-too-frequent instance, the volunteer will experience a sense of loss and will often replenish their sense of connectedness by turning to the client and seeking to strengthen that relationship.
5. Develop a system of peer pressure by creating bonds among volunteers. In a sense this adds another circle to our diagram:

*Diagram Six
Volunteers, Volunteer, Agency, Client Needs Overlap*



If volunteers relate to one another they will tend to

reinforce good behavior patterns, because individuals will not want to “let their buddies down.” Adding additional volunteers to our diagram allows us to counterbalance the altruistic needs of the volunteer which are directed to the client with the social needs of the volunteer which will be directed toward their peers.

The Good, the Bad and the Inevitable

What all this indicates is that the high motivational levels that initially cause people to volunteer have some potentially negative sides. High motivation can lead to burnout. It can also lead to disillusionment if

expectations cannot be met. Each of these will result in volunteers leaving a program.

And, as discussed here, it can also lead a perfectly good volunteer to sometimes engage in behavior that is “bad” from the context of a program, but which is entirely rational from the viewpoint of the volunteer who is determined and eager to help a client they value. Volunteers have always been known for being willing to “do a little extra,” and this is just one more case of where that willingness is perhaps an inherent part of the volunteer experience.

Sample Policies on Boundaries

Steve McCurley

Relationships with Beneficiaries

The clients that are served by our organization can be isolated, lonely, and particularly vulnerable to abuse and exploitation. For this reason, it is important that our volunteers take great care in managing their relationships with clients they meet and serve through their involvement.

Volunteer relationships with clients have the same boundaries as those between paid staff and clients. It is appropriate to be friendly, courteous, and caring but it is not appropriate to become friends with clients, their family members or others connected to the delivery of service. Friendships with clients can lead to unclear boundaries, inappropriate expectations, the appearance of favoritism or exploitation, and conflicts of interest.

Invitations to volunteers from clients to spend personal time together or to engage in other than organizational business are declined respectfully, citing, as needed, this policy as the basis for their action.

This policy applies throughout the duration of the delivery of service and for not less than twelve months following the termination of volunteer service to the client.

Volunteers normally do not provide service to relatives or friends. If such a request is received by a volunteer from one of her or his relatives, friends or close acquaintances, the volunteer reports this to the Coordinator of Volunteers who may assign the case/inquiry to another volunteer or paid staff.

Volunteers who identify needs of clients outside the boundaries of their own volunteer role (e.g., financial, health care, household assistance, transportation, etc.) bring these needs to the attention of the Coordinator of Volunteers for referral to appropriate community services.

Volunteers treat all clients with courtesy and respect. Volunteers respect the personal boundaries of clients and govern their physical behaviors accordingly.

Financial Transactions With Clients

Volunteers do not enter into financial transactions with clients, their family members or caregivers, either lending or borrowing in either direction. If clients are in immediate financial need, the Coordinator of Volunteers is notified and referral is made to appropriate community services.

Political issues

Volunteers do not engage in political activities, campaigning or lobbying during volunteer hours. While on duty, volunteers do not:

- publicly express their personal opinions regarding political issues
- display or distribute political signs or materials either on their person or at work sites
- solicit or accept contributions for political purposes during volunteer hours.

Representation of the Organization

Volunteers are agents of the organization while functioning in their assigned volunteer roles. Volunteers are not spokespersons for the organization in any formal sense.

Volunteers are authorized to act as representatives of the organization only as clearly and specifically prescribed by their role descriptions and only to the extent of such written specifications.

Volunteers do not represent themselves as spokespersons of the organization. Nor do they say anything or act in any way that might obligate the organization or be construed as a formal spokesperson role.

Prohibited actions in this regard include, but are not limited to:

- public statements that might in any way be construed as originating from or representing the organization
- statements to the press regarding anything pertaining to the organization or the volunteer's service with the organization
- lobbying efforts with other organizations, governments or other entities
- collaborations or joint initiatives not clearly authorized in advance by the organization
- any agreements, undertakings or contractual obligations on behalf of the organization

Use of organizational affiliation

Volunteers may not use their affiliation with the organization in connection with partisan politics, religious matters, business dealings or community issues. Volunteers do not sell, recommend or endorse any specific insurance or medical product, agent or company, or promote religious or political beliefs, perspectives or practice.

Acceptance of Gifts

The work of volunteers often engenders gratitude among clients. It is understandable that some clients and those who care for them wish to express their thankfulness through gifts to the people who have been so helpful. However, acceptance of personal gifts by volunteers is prohibited to prevent, and prevent the perception of, exploitation of clients and their families and caregivers and to protect both the reputation of the organization and its volunteers from accusations of favoritism or personal gain.

Volunteers do not accept gifts from clients, their families, caregivers, or other representatives. Any such offerings are respectfully and tactfully declined, citing, as needed, this policy as the basis for their action.

For this policy, *gift* is broadly defined to include any payment, distribution, transfer, loan, advance, deposit, gift or other rendering of money, property, services or anything else of value, whether tangible or intangible. Gifts include but are not limited to material goods, money in any form, valuables, jewellery, wedding gifts, tickets to sporting events and entertainment, and travel.