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ABSTRACT

This booklet is one of a series of publications designed to present a complete system for planning, organizing, and directing the development and operation of individual volunteer programs, as well as the management of a comprehensive volunteer system consisting of many individual programs. This particular booklet discusses the concepts and procedures necessary for developing the type of management information system that is essential to the development of new volunteer programs. This information system constitutes the major instrument for the evaluation of a Volunteer Services System. Individual chapters focus on different phases of evaluation that correspond to the phases of program development discussed in Handbook 2. These include the phases of context evaluation, input evaluation, process evaluation, and product evaluation. (JG)

Volunteer
Services
System





# III INFORMATION SYSTEM FOR A VOLUNTEER SERVICES SYSTEM

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Volunteer Services Management System
E.S.E.A. Title III
Columbus, Ohio City School District

# Volunteer Management System

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FOREWORD

The purpose of this Handbook is to discuss the concepts and procedures needed to develop a system which is capable of gathering and providing information considered essential for sound decision-making relating to the development of new volunteer programs. The information system serves the function of evaluation which has been defined as the <u>process</u> of <u>collecting</u>, <u>providing</u>, and <u>utilizing useful information in order to make sound decisions</u>.

Four distinct phases of evaluation activity have been identified. These phases correspond to the four phases of volunteer program development; the information system focuses on the questions raised during each phase as outlined below:

| PHASES OF EVALUATION | QUESTIONS | PHASES OF PROG. DEVELOPMENT |
|---|---|---|
| CONTEXT EVAL. | "What should we do?" | PLANNING |
| INPUT EVAL. | "How should we proceed?" | PREPARATION |
| PROCESS EVAL. | "How are we doing?" | IMPLEMENTATION |
| PRODUCT EVAL. | "How did we do?" "What should we do next?" | REVIEW AND RENEW |

Procedures necessary for gathering and providing the appropriate information during each phase are varied and often unique to specific programs. However, certain activities can be generalized. Context evaluation frequently requires a <u>needs assessment</u>. Input evaluation which culminates in the selection of a volunteer program to alleviate identified needs is greatly facilitated by the development of an <u>information resources file</u>. Process evaluation involves the continual <u>monitoring</u> of the on-going program and accurate <u>record keeping</u>. Product evaluation is a judgment effort calling for a <u>final appraisal</u> of the effects of the volunteer program.

## NEEDS ASSESSMENT

Planning a new volunteer program requires more than good intentions and a creative imagination. It demands a solid base of information upon which future program decisions can be built.

The initial step in developing an information system and in planning a new volunteer program is to conduct a needs assessment. Too many developers are uncomfortable with those two words; they should not be.

Needs assessment is simply a process which we go through in order to identify specific needs and to decide priorities among them. A need is is indicated by a discrepancy between "what is" and "what should be".

Needs assessment may focus on student needs:

Example: Learning - disabled students in junior high school read at grade levels lower than expected.

or

It may focus on Institutional needs:

Example: The tutorial program does not provide help to students with learning disabilities beyond the elementary grades.

Whatever the focus, the primary aim of a needs assessment is to uncover areas within the educational system which fall short of our desired levels of expectation. Because education is a human enterprise, the identified needs must ultimately relate to people's needs.

If the end product of a needs assessment must relate to human needs, then it seems logical that the needs assessment itself must be a <u>human process</u>. This process may use technical measurement procedures, but it also serves as a catalyst to bring people together, to talk, to interact, to exchange ideas, and to create a climate suitable for the development of a new volunteer program.

**HOW TO CONDUCT A NEEDS ASSESSMENT**

1. <u>Define Boundaries and goals for the needs assessment</u>.
   Before actually conducting a needs assessment, it is necessary to determine the <u>goals</u> and <u>boundaries</u> for the assessment. This step simply identifies <u>why</u> a needs assessment is being conducted and <u>how much</u> information is needed at this stage of program development.
2. <u>Establish a Needs Assessment Committee</u>.
   Once step 1 is completed, the needs assessment effort can be justified and explained to other persons who will soon become involved.

The next step is extremely crucial for several reasons. Prior to step 2, much of the planning of new volunteer programs has been in the hands of persons <u>outside</u> the individual school building. The needs assessment process offers the first opportunity to bring together the Volunteer Services System personnel, the school principal or staff coordinator, teachers, parents and other interested persons.

Together, this committee will be responsible for actually conducting the needs assessment. Why not let the

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"experts" do this? The answer lies in the human aspects of a needs assessment. Those persons who are fully involved in the needs assessment are more apt to accept the results obtained. They may also be more willing to act, or to follow up with appropriate decisions. An outside expert may provide consulting advice but should not be assigned the entire task.

In selecting members of the needs assessment committee, actual size of the group is less important than representative distribution. Whoever has a stake in decisions concerning new educational directions should participate in this planning activity. Thus, a needs assessment committee may include, as mentioned before, members of the Volunteer Services System, school staff, volunteers, parents and students.

The involvement of a broadly-based membership should stimulate a strong commitment to the entire effort and a sense of ownership of the project. Commitment and ownership are, of course, two essential components of a positive climate without which no meaningful educational change can take place.

3. Develop objectives and criteria. The first task for the needs assessment committee is develop a set of educational objectives and criteria statements. These may be broad statements covering a wide range of educational features, or they may be specific to one aspect of the educational system. In any case, the

group will have to agree upon a set of statements which describe the ideal set of objectives, or goals, which they would like to attain. It is against these statements that actual program achievements or the real state of affairs will be matched in order to find discrepancies and to identify needs. Goals and criteria statements also help to focus the needs assessment and to formulate the survey instruments and questions which will be used to obtain the information needed.

Goal statements should be simple and precise. Philosophic pronouncements have an emotional appeal and are often irresistable, but they are difficult to work with. It is assumed that everyone would like to optimize the academic potential of each student. That goal, then, can be translated into a more precise statement specific to more immediate concerns: that remedial tutoring should be offered to all students who need it.

Criteria statements differ from goal statements in that they specify a level of attainment, or standard, by which a goal or objective can be measured. As an example, the goal of remedial tutoring for all students needing it may be restated as follows: that all students identified as requiring tutoring receive at least two hours of individual instruction each week.

Whether the ideal state of affairs is described in terms of goals or criteria statements is a matter of preference and depends on the topic being considered. What is important, is that the set of statements prepared be inclusive enough to satisfy everyone and to assure the creation of a needs assessment which will be as comprehensive as it is feasible.

4. Instrumentation.

This step consists of several parts:

4.1 For each goal or criteria statement appropriate measures must be determined. In other words, what evidence is needed to determine how well the goal or goals are being achieved? For example, one goal of a sound Volunteer Services System should be to involve appropriate administrators in various areas of volunteer operations. One measure for this goal would be a comparison between those areas in which administrators are currently involved and those areas in which they feel they should be involved. Any discrepancy resulting from this comparison will indicate an area of need.

4.2 Where will the needed information be obtained? Before developing any instruments, it is first necessary to determine which group or groups will be asked to respond. This involves identifying the relevant population and/or selecting appropriate samples from it.

Population: It is essential to seek the required information from as broad a population as possible. Teachers, administrators, volunteers, students, community representatives all have a stake in improving educational programs and can offer valuable insights and information based on their different perspectives. Again, greater involvement is this phase of the needs assessment fosters greater acceptance of any decisions made later in an effort to alleviate identified needs.

For ease in the analysis of the responses, the same questions should be asked, wherever possible, of all groups.

Sample: It is usually not feasible to ask all members of each group to respond. To reduce the number of respondents in each group to a manageable size, a strategy for randomly selecting a smaller sample should be employed.

For example, all the members of a group, such as all teachers in a school district, might be listed alphabetically. Each name could then be assigned a different number. Using a random number table, which can be found in most basic statistics texts, a 20% sample can be chosen by this lottery method.

There are several other sampling techniques, some rather sophisticated and requiring expert handling. The objective of any sampling procedure is to reduce in size a large population while retaining in the same relative proportions certain characteristics found in the total population. If there is any doubt about this stage of the needs assessment, it is best to seek the guidance of a statistician or educational evaluator.

4.3 An instrument must be developed which will obtain the required information. This assessment strategy may assume one of several formats:

- personal interview
- questionnaire
- objective tests, e.g. reading scores
- inventory or check list
- rating scale
- survey or opinionaire

Whichever type of strategy is selected, all questions on the instrument created should relate to the goal statements previously established. A good instrument obtains as much information as is needed but should not go beyond its specific purposes.

Frequently, more than one instrument will be required. This is especially true if both objective and subjective data are sought. For example, it may be necessary to administer an achievement test as well as an opinion survey. Wherever possible, it is desirable to obtain both objective and subjective types of data in assessing needs.

4.4 After the respondents have been identified and the instruments have been developed, procedures for administering the instruments must be established. This phase involves:

- Informing the respondents, either in a cover letter or in person, of the purposes of the needs assessment.
- Identifying who is to administer the instruments.

- Establishing a schedule for administering the instruments.
- Collecting the instruments.
- Storing the returned instruments according to pre-determined categories, e.g., all teacher responses kept separate from parent responses.

4.5 Once the instruments are collected and stored, they are ready to be analyzed. Each question must be examined and an appropriate statistical procedure applied.

The most common statistical procedure used is to compute a mean or average, score for each item. How many responses appear in the YES column, for example? The total, divided by the number of respondents for that item, yields a mean score.

In a series of items, a ranking of items can be obtained by placing all mean values in order from lowest to highest.

It is usually wise to seek competent assistance during this stage. Data can be analyzed a variety of ways, and the results interpreted differently according to the analysis.

If the needs assessment was conducted on a small scale, such as in an individual school, the analysis can be kept fairly simple. Often this involves a tally of responses in each category followed by a ranking. The results among the teachers, volunteers, administrators and students' questionnaires can then be compared.

The ultimate aim of the analysis, no matter how complex or simple, is to compare the information obtained with the goals established earlier. Remember, the purpose of the needs assessment is to compare "what is" with "what should be". The analysis, therefore, must include this comparison and note discrepancies in order to pinpoint needs.

5. Identifying needs and setting priorities among them is the next step in conducting a needs assessment. After the information obtained has been analyzed, it will be necessary to examine the identified needs and to make some vital decisions.

Unfortunately not all needs can be alleviated, in spite of all noble intentions. Many factors determine the ranking of needs which affect our decision making. We will need to consider:

- available resources
- political and social climate
- legal factors
- community values
- physical plant constraints

One procedure for ranking needs is to consider the relative importance of each goal statement. It may be feasible to rank these, thereby assigning comparable rankings to the needs which correspond to each goal area.

Another ranking procedure assigns priorities to needs identified by the greatest number of respondents. Some needs may be very severe but not as pervasive; other needs may affect large numbers of students but may not be as intense.

The decisions as to which needs are to be served should consider:
- relative importance of the goal areas
- intensity (discrepancy value) of each need.
- pervasiveness of each need.
- feasibility of alleviating each need.
- the varied groups identifying each need. (Are needs identified by the teachers to be given the same priority as those identied by the school administrators?)

Whether to consider each factor equally or to weight them is arbitrary and best decided upon by those who are most affected by the resulting decisions.

6. The final step in a needs assessment is also the beginning of the next phase of program development. This step calls for implementing the results of the needs assessment.

No needs assessment is really complete until action is taken as a result of the findings. To know that needs exist, to be able to identify them, and to recognize their relative urgency is but the beginning; unless something is done to alleviate those needs, the entire exercise seems futile.

It is important that everyone concerned with needs assessment -- those who have conducted it, those who are in a position to act on the findings, and those community persons who are affected by the final decisions -- know that the results of the needs assessment will serve as an indispensible base of information upon which crucial educational decisions are to be made. Samples of Needs Assessment Forms can be found in the Appendix.

**SUMMARY**

With the conclusion of the needs assessment, the planning stage of volunteer program development is complete. The information gathered should provide a basis upon which to:
- identify and rank educational needs.
- assess organizational climate relating to volunteer programs.
- determine whether new volunteer programs should be developed.
- identify a core of persons who will be responsible for implementing the findings of the needs assessment.

At this point, "where we are" should be known and a mutual agreement should exist among all parties as to "where we should be heading". If this is true, the next phase of program development, PREPARATION, can begin.

## RESOURCE INFORMATION FILE

After needs are identified, and after the decision has been made to seek solutions which might alleviate those needs, the process of selecting the appropriate solution begins. Usually, numerous volunteer program possibilities are available. Some volunteer programs may be entirely new; others may have been implemented elsewhere.

In order to select a volunteer program which relates to the identified needs, it will be necessary to gather information from outside sources. The development of a resource information file can greatly facilitate the process of selecting the volunteer program which is most suitable in meeting identified needs.

The resource information file is an essential source of valuable input for planning innovative volunteer programs. The file can provide information on types of existing volunteer programs, methods of recruitment and training of volunteers, and services that volunteers can perform.

The creation of a resource information file is a simple process, but it requires decisions that can only be determined by the specific needs of the organization based on its goals and objectives. Can the money spent for the file be justified? Will the organization disseminate the materials it creates? Is the organization a profit-making enterprise or is it granted funds for free public use?

The process of finding available pertinent information begins by communicating with people or organizations involved in and knowledgeable about volunteer activities and materials. The next step is to obtain literature from well-known volunteer organizations. Find out what materials exist and obtain names and addresses of other volunteer associations, clearinghouses, programs and publications. In the search for more literature, the next step is to write to these organizations asking for their publication lists and for your organization to be added to their mailing lists.

From the information received, choose the periodicals that are most informative in the area of interest and subscribe to them. This will provide a source of new ideas, names, programs and publications. Publication lists and bibliographies should be checked for new materials and retained for future reference. Publication lists are especially useful since the price, publisher, and an annotation of the item are usually included in the listing.

Join the "professional" volunteer associations either personally or as an organization. The associations are great sources of information. Often these groups publish a newsletter or periodical, direct workshops, and hold conventions. A membership opens up an area of both human and printed resources.

The federal government, especially the Department of Health, Education and Welfare, is involving itself with volunteers in many fields and is a great source for thoroughly developed and inexpensive materials.

Commercial publishers list materials that can be applicable but published volunteer material is not abundant. It is worth checking to see what their catalogs contain.

While reviewing materials available, check mark items of interest on the lists with which you are working. Keep a separate notation of items to be ordered, including author, title, price, publisher and publisher's address. If a review is available, mention that also. Periodically review your materials and compile a list of those items which you do wish to order. Check carefully for items which seem to be duplications and reconsider in terms of budget constraints items which may be costly. If necessary, make any inquiries concerning price and current availability before actually preparing requisitions and purchase orders.

Resource materials vary in formats and sizes: they include commercially published books, pamphlets and periodicals, as well as mimeographed forms, flyers, posters and packets. In addition, authors, titles and other identifying information are not always included. These variables should be considered in deciding which method to use in filing.

## HOW TO DEVELOP A FILING SYSTEM

The needs of the people using the materials are also very important. Is access by place, subject or author more important? How much use will the material receive? Will anyone other than staff use the materials? Decisions must be made concerning how to catalog material after its initial review. For the resource information file to be really effective, the material must be relevant and easily retrievable.

Several filing systems can be employed to make the material retrievable. All materials can be filed under the author alphabetically. This is an especially good method for published material. The drawback in establishing this system exclusively is some items may have corporate authors or no author at all.

All materials may be filed under the name of the place of publication. This method keeps all materials from one program together and gives a complete picture of the volunteer activity in a specific city and school system. It is not a good method for filing commercially published books or pamphlets.

A third method for categorizing materials can combine author and place of publication. There are two ways to file using this combination approach. The material can be inter-filed in one system (author and place alphabetically) or filed separately (one file for each alphabetically). The individual problems inherent to either pure cataloging method are easily overcome by electing to employ a system which combines both filing approaches.

In most instances, the material needed relates to a specific subject or program (i.e., recruitment or school volunteer tutors). To develop a subject method of retrieval takes time and effort which may be costly. The extent of requests for information and the ease and efficiency of its retrieval must be considered before making a commitment to subject cataloging for the resource information file.

If the materials are mainly nonpublished documents, packets, forms and article reprints, it would be advisable to investigate vertical file systems. A vertical file houses miscellaneous forms of materials in filing cabinets. The materials are not individually cataloged but they are filed by subject. It would still be necessary, however, to adapt the system for volunteer materials.

There are several subject cataloging/classification systems that can be adapted. The two best known are the Dewey Decimal and the Library of Congress. Neither has appropriate categorical designations for volunteer material, therefore, to be applicable, either must be modified. The number divisions of either system can be combined with subject descriptors (key words) used in volunteer operations.

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If the resource information file is to contain materials relevant to a single subject area of involvement (i.e., education or rehabilitation), the possibility of a special cataloging/classification system for that subject exists. Special libraries in that particular field may have developed their own system which can be modified for volunteer materials.

The Volunteer Services System used the Educational Resources Information Center's (ERIC) Thesaurus of subject descriptors as the basis for developing its cataloging/classification system. The ERIC Thesaurus lists two types of terms, descriptors (key words) and synonymns that are acceptable for indexing and searching in the ERIC system. The terms are very specific in each category, which provides excellent subject detailing. Numerical divisions were arbitrarily assigned to groups of descriptors, based on a system fabricated to correspond to descriptor grouping.

It is possible to develop a completely unique system based strictly on the available materials and personal ingenuity.

The process of developing a resource information file includes the construction of a card catalog. A card catalog consists of cards for author, title, subject, place of publication or any other important access point for each item cataloged. Any combination of these cards giving more than one point of access is helpful for the file user. The cards should be housed in a separate file where they are easily accessible to users.

Depending on the method chosen for cataloging the material, the corresponding subject heading lists should be used. Subject headings are uniform titles for specific subject areas (i.e., tutorial programs instead of tutoring programs, teacher aides instead of teacher assistants). Sears subject headings correspond to the Dewey Decimal System while the Library of Congress has its own subject headings. The Volunteer Services System adapted the ERIC subject descriptors using Sears divisions. In developing original subject headings, the important fact to remember is to use the same heading repeatedly without varying its components.

The actual cataloging of the materials can be started as soon as the necessary decisions have been made and plans completed. This implementation requires that one person be responsible for developing and maintaining the resource information file. Because the creation of an effective file system involves continuous processing, maintaining its continuity is essential

DEVELOP APPROPRIATE FORMS

The process concludes with the designing of a check-out method to facilitate circulation and forms to evaluate the efficiency and value of the system. The simplest check-out method is a loose-leaf notebook. Each page has vertical categories for author, title and call number of the material borrowed; name, address and phone number of the borrower; and date borrowed and returned. (See example) For a more sophisticated library, each item should have a card pocket containing a check-out card and date due slip.

LIBRARY CHECK-OUT SHEET

| NAME AND ADDRESS | PHONE NO. | CALL AND UNIQUE NOS. | AUTHOR AND TITLE | DATE OUT | DATE RET'D |
|---|---|---|---|---|---|
| | | | | | |
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The person responsible for the borrowed material can be sent an overdue notice when the material is not promptly returned (See example)

> It has come to our attention that you borrowed
>
> Title ______________________________
>
> Author ______________________________
>
> Call No. ____________ Date Borrowed ____________
>
> from our resource file and have not returned it.
>
> Please do so as soon as possible.
>
> Thank you.
>
> Sincerely,

A record of materials borrowed maintains the accuracy of the file. It can also provide information regarding the relevancy of the materials in the system to the users by the extent of requests. Subject areas that need to be updated or strengthened will be indicated. To determine the ease of retrieval and general usability of the entire system, an evaluation form, to be completed by the borrower, should be created. The information provided by these forms and records will help management appraise the value and quality of the system. Upon dissemination of new materials (based on material contained in the information resource file) to other organizations, the information cycle is continued.

<u>USER INTEREST</u>: Please fill out whenever you use the file.

NAME ________________________

EMPLOYER ________________________

POSITION ________________________

What are you looking for in the file?

________________________________________

How did you know about the file?

________________________________________

Could you find the entry with the card catalog?
Yes _____ No _____

Could you find the item in the file?
Yes _____ No _____

Was the material relevant?
Yes _____ No _____

Have you looked for the material anywhere else?
Yes _____ No _____

How long did it take you to find what you were looking for?
Long time _____ Average time _____ Short time _____

Do you have any ideas or suggestions for improving the file?

________________________________________

________________________________________

## SUMMARY

A resource information file is a collection of materials from outside agencies gathered to provide useful knowledge resulting from the experience and expertise of others in the volunteer field in order to make sound decisions.

The process of creating a resource file includes:

- Selecting of materials from appropriate sources.
- Building office files.
- Developing a classification scheme.
- Constructing a card catalog.
- Adapting subject headings.
- Cataloging materials.
- Creating forms for circulation and evaluation.

Full utilization of a resource file facilitates decision-making relating to program selection. This selection process, is really part of a cycle which begins with the gathering of literature for the resource file and concludes with dissemination of information about the volunteer program ultimately selected. This exchange of information is essential not only to the development of new volunteer programs within a Volunteer Services System, but to the improvement of volunteer services everywhere.

A thorough review of program options and an evaluation of system resources including available personnel and budget should provide an adequate base of useful information needed for program selection.

**VOLUNTEER PROGRAM DESCRIPTION AND OBJECTIVES**

Once a new volunteer program is agreed upon, the next phase of program preparation, involving a description of the new program and its objectives can begin.

In the excitement of developing a new volunteer program, it is all too easy to proceed without pausing to delineate the objectives of the volunteer program selected and to describe clearly the program's purposes and procedures. This step is crucial, not only for the development of an information system to be used for evaluation purposes, but, also to assure logical progress in the course of program development.

A complete program description should include:

- the name of the program, e.g. remedial tutoring.
- the school or schools served by the program, e.g. five junior high schools.
- the students involved, e.g. those students in grades 7, 8, and 9 identified by certified school personnel as having remedial needs.
- Program Objectives - example:
  1. to improve the academic skills of remedial students.
  2. to provide one-to-one instructional experience through "coaching".
  3. to provide a learning opportunity for remedial students outside the classroom.
  4. to provide a pressure-free learning experience.
  5. to provide an opportunity for

friendship - a meaningful relationship between student and tutor.

- Volunteer Tasks and Activities - example:
  1. meeting with tutee at regular intervals and predetermined time.
  2. using materials supplied by the school, including textbooks and any other materials needed.
  3. attending in-service training to be given as needs arise and monthly group meetings or individual conferences between resource teacher and volunteer.
- Qualifications of Volunteers - example:
  1. all persons from the community who have the interest and time to work directly with students having remedial needs.
  2. attendance at orientation and training sessions before placement.
  3. minimum commitment of two, one-half hour sessions per week.

The process of describing the program involves determining the equipment, budget and manpower needed, planning the orientation and training of volunteers, planning information needs for evaluating the effectiveness of the program, and making provisions for necessary changes. This step obviously goes beyond generating the good idea. The written description of the proposed program should be complete, should indicate definite future directions and must be consistent with the overall policies and goals of the Volunteer Services System.

Having a description of the program and its objectives in written form helps to clarify the intents of the program not just for its developers, but for the volunteers, teachers and students as well. It is a necessary requisite to successful recruitment, placement, training and supervision of volunteers.

Describing the program and outlining its objectives also provide the necessary information base for conducting program evaluation. As with a needs assessment, a comparison between "what is" and "what should be" can be made by matching actual program process and outcomes with the original program description and objectives.

Perhaps because this step is such a simple one, it is so frequently overlooked. Not until someone says, "tell me about your new program", or asks, "what kind of volunteers are you looking for?", does the necessity of this step become apparent.

As with a needs assessment, the writing of the program description and its objectives can be a cohesive activity which brings together the various persons who will be involved in the program implementation and transferring ideas into words, or arriving at a consensus on the actual set of program objectives requires that the group have complete understanding of the program. If understanding is incomplete, it is during this process of program preparation that areas of confusion can be clarified and agreement of diverse opinions may be generated.

Once writing begins, it can be assumed that the group agrees with and supports decisions made. Each member of the group should feel that he or she had a full share in that decision-making process, and should, because of that involvement, feel a sense of ownership in the program. With this broad base of commitment, the new program is now ready to proceed, and plans for its implementation may be formulated.

## PROGRAM MONITORING AND RECORD KEEPING

With the planning and preparation phases completed, the new volunteer program may now be launched with reasonable confidence that it will be a success. However, even the best laid plans have been known to go astray. It would be unwise to permit any program to proceed for too long without periodically asking, "How are we doing?".

In order to answer that question, it will be necessary to gather information continually. What kinds of information will be needed?

The types of information gathered during the monitoring phase of the program depend upon the description of the program and its objectives. The information needs of a tutoring program, for example, will differ somewhat from those of a health room volunteer or library aide program.

Monitoring is a dynamic process to assist in the development of a dynamic, ever-changing program. An analogy may be drawn between program monitoring and the filming of events occurring in one moving train from another moving train. One must capture on film everything that goes on in the train while at the same time keeping pace with the train itself. All effective monitoring, however, should provide feedback data continuously so that program changes, modifications, additions, or deletions can be made.

In many ways, monitoring of on-going program activities is a frustrating, yet challenging process. The procedures used are almost always unique to each specific program. Yet they all share a similar function and purpose: To capture and record facts, opinions, concerns, ideas with accuracy, precision and timeliness. Decision-making at this stage, as elsewhere, depends on "capturing" the right information at the right time.

The general objectives, then, of a sound monitoring process are:

1. To gather and review pertinent data on a continuous or periodic basis in order to make judgmental decisions regarding the program.
2. To provide a basis for making changes in the program as indicated by the data.
3. To provide a basis for adding or deleting components of the program as indicated by the data.
4. To note components which cannot be changed after the program has begun but which should be considered before a new year begins again.
5. To note unanticipated outcomes, both positive and negative.
6. To have base-line data available prior to the end of the year which can be used during the final appraisal phase.

A sound monitoring process should provide information for decision-making during the course of the program as well as for end-of-the-year appraisals.

**CRITERIA FOR JUDGING ATTAINMENT OF OBJECTIVES**

The essential tool of the monitoring process is record keeping. The recording of events as precisely as possible is the means whereby events are described and evidence of what actually transpired is gathered and eventually utilized in decision-making.

Before developing a record-keeping procedure, however, program description and objectives must be examined. Everyone involved in the volunteer programs should understand what the program is all about and what it hopes to achieve. In addition, it will be necessary to determine the kinds of evidence which will indicate progress toward those objectives. This is one of the most crucial steps in implementing monitoring activities; it is also one of the most difficult. Goals and objectives are often elusive, and the criteria for judging the attainment or progress toward a goal may be difficult to identify. Certain evidence may not become obvious until long after the goal has been achieved, while other evidence may be so inconspicuous at first glance that it goes unperceived.

Also, several criteria may allow judgments to be made concerning a single goal. Rarely do all these criteria share equal weight. Priorities may be assigned to them either on the basis of their logical importance or on the basis of more practical concerns such as ease in obtaining the evidence of their attainment. It is equally important to consider that the correspondence between goals and criteria may not necessarily be mutually exclusive, i.e., the same criteria may apply to different sets of goals.

As an example, one of the objectives of a sound Volunteer Services System concerns the proper placement of volunteers. Whether or not volunteers are, in fact, performing those tasks for which they are best suited and at which they find the greatest satisfaction can be judged in several ways. One kind of evidence is the positive achievement on the part of the child; another is a favorable appraisal of the volunteers made by the participatin teacher. Both of these criteria, however, can also serve to evaluate the volunteer training process and the goal to provide volunteers with the skills needed to perform their assignments effectively.

Perhaps the simplest technique for establishing criteria related to program goals is one which lists the goals and enumerates all possible types of acceptable evidence for determining whether these goals are being met. The utilization of all criteria will, of course, be impossible Criteria which serve more than one goal or which are obviously important should be given priority. It is tempting to select criteria which are relatively easy to measure. This facilitates the task of establishing criteria but may not always serve the purposes of program evaluation best. No criterion should be overlooked or discarded, regardless of the difficulty involved in finding evidence for it. It is quite possible that the simple act of stating the criterion, even if difficult or impossible to determine can affect and influence program direction in a positive manner.

Since this is so crucial a step, a look at some other examples may be helpful: One of the objectives of a Volunteer Services System is the efficient processing of requests for volunteer services. What evidence is needed to determine if, in fact, requests are being processed efficiently? First, it is necessary to specify that "efficient processing of requests" means that no more than one week, or ten days, or one month - some definite length of time - will elapse between the request and fulfillment of that request.

Now that a criterion, or standard, of efficiency has been specified, appropriate record-keeping procedures can be developed. Obviously, the actual length of time devoted to the processing of requests must be noted. At least two dates must be recorded - when the request was made and when it was filled. Ideally, other information should also be obtained: the date when a search for a volunteer to service the request began, the date when the volunteer was recruited, the date when training and orientation occurred. In this way, one may determine whether there was any delay between the initial request and recruitment or between recruitment and training. All these data are needed to evaluate the various procedures involved in the provision of requested volunteer services.

A look at the objectives concerning proper recognition of volunteers offers another example of criteria selection and record keeping. It is known that many volunteers provide their services for reasons intrinsically their own. However, volunteer motivation is often of short duration, for perfectly valid reasons, and program developers should provide for an external reward system such as recognition dinners, occasional media attention, service certificates, etc. to help sustain those internal motives which brought the volunteers to the school in the first place. There are two objectives to consider here: (1) to increase recognition of volunteers as an expression of gratitude, and (2) to increase the retention rate of volunteers as a result of meaningful recognition.

The criteria which indicate progress toward the first of these two objectives might be the scheduling of a specific number of recognition dinners held during the year, a certain number of TV spots aired, or regular weekly newspaper articles printed. It may not be feasible to include all these (and other) criteria, and the problem of establishing priorities arises. Perhaps one TV spot per month indicates greater progress toward the goal of increased recognition than weekly mention in a school bulletin because of the larger audience reached. Once again, record keeping is essential for monitoring these varied recognition activities.

To determine attainment of the second objective, increasing retention of volunteers, one may ask, "Will the volunteer program accept as evidence an increase of 10% in the retention rate over previous years or should the increase be 50%?". Other factors must also be considered here; the available volunteer resources depend not only on the rate of retention but also on the absolute number of volunteers available. 100% retention may be inadequate to meet the requests; whereas 50% retention, if there is always a large pool of new volunteers available, may serve quite well. Whatever the determination, records must be kept of those volunteers who sign up, sign in, drop out and sign up again. Does the "new crop" really represent all new volunteers, or are there some former volunteers included in the roles? Did volunteers return because of recognition activities?

In addition to those criteria measures which one plans in advance, it is extremely important to be alert to information which was unanticipated or simply overlooked during the planning stage. While program developers can account for newspaper articles released by the Volunteer Services System, they also must notice other coverage such as letters to the editor written by grateful parents to acknowledge the services of the volunteers. And in noting the volunteer sign up sheets, they should not neglect to observe the number of volunteers who no longer have children in school but who have chosen, nevertheless, to continue serving in a volunteer capacity. Such information may often reveal more meaningful data than some of the "expected" evidence relevant to the program objectives.

MONITORING FORMS

Obviously, record keeping involves many different procedures and materials. Of the many monitoring forms which may yield the information needed, the following list includes but a few suggestions:

- Volunteer's Report Form
- Volunteer Monthly Service Form
- Administrative Volunteer Time Chart
- Teacher's Monthly Report on Volunteer Services Form
- Evaluation of Meetings Form
- School Monthly Report Form
- Impact of Volunteers on Students Form

All evidence must be reviewed constantly; again, this dictates precise record-keeping techniques: tallying request forms, checking attendance logs, noting facilitators and barriers to success of the program (e.g. sudden shift in insurance company policy concerning volunteer personnel); review assignment sheets, case histories of particular problems or outstanding successes, suggestion box comments, etc. Whatever changes are needed should be made immediately, if possible; those which must wait until the following year must be noted. The effects on other aspects of the program due to the inability to make that change promptly must be considered.

The forms developed should be as simple and concise as possible and should seek only the information needed. When developing forms, it is important to keep in mind two considerations: program objectives and their criteria measures. In other words, what does the program hope to achieve and what evidence is needed to determine whether the program is meeting its objectives?

The information obtained should permit comparisons between what is actually occurring at any time during the life of the program and what should be occurring. This assumes that a time line was established prior to the start of the new program, and that interim objectives have been delineated. By noting any discrepancies between the plan and the actual events, corrective action can be taken. Deviations from the plan are to be expected; it is suggested, however, that these deviations be detected early, before they become irreversible defects in the program.

Monitoring is a diagnostic procedure, but it is also prescriptive. Once potential trouble spots are detected, the information obtained through monitoring should also indicate possible solutions to the problem. Depending upon the program, and how extensive the budget and personnel are, monitoring data can be obtained daily, weekly or monthly. A period longer than one month is not recommended for monitoring purposes. Quarterly information may be gathered but chiefly as data to be used at final appraisal time.

## PERSONNEL RESPONSIBILITIES AND MONITORING

No monitoring process can begin until staff responsibilities are defined. Developing record-keeping forms is the first step; designating who is to fill them out and who is to receive and analyze them is equally important.

Monitoring procedures are often unpopular, primarily because they are time consuming. Those persons who must provide the information are also the people whose time is most occupied. They would much rather "get on with program" than take time out to complete forms.

However, if the purposes and objectives of monitoring are fully explained, and if <u>everyone</u> involved can help develop the monitoring procedures and materials, much resistance can be reduced.

Information needs, as seen by the program developers, must be delineated and conveyed to teachers, volunteers, coordinators, and to anyone else from whom information will be sought. All these persons need to be aware of:

- What information will be needed
- Why the information will be needed
- Who will need the information
- When the information will be needed
- How the information will be conveyed
- To whom the information will be conveyed
- From whom the information will be obtained.

Monitoring procedures need not always be formal, nor must the information always be conveyed in written form. It is wise to be aware of other methods which also yield valuable information, including:

- Casual comments
- Verbal suggestions
- Complaints
- Informal staff meetings
- Teachers' Lounge conversations
- Classroom visits

Each person involved needs to feel the importance of his or her contribution to the process of developing and improving an on-going program. The information obtained during the monitoring phase can be of benefit to those <u>supplying</u> the information as well as to those <u>receiving</u> and <u>analyzing</u> it. However, only if the suppliers of information recognize its value will they willingly assume the extra burdens which monitoring entails. Only then, will the information <u>received</u> by accurate, timely, and generally useful to those whose decisions directly affect the program itself.

As the end of the school year approaches, it is time for a retrospective review - to begin asking, "How did we do?". A final appraisal provides very valuable information for program developers. It allows a review of all aspects of a program at a time when the perspective is most comprehensive.

The information gathered at this time serves two purposes: (1) to assess the worth of the volunteer program, and (2) to provide a basis for re-designing the program for the coming year. In other words, the same evaluative information gathered may be viewed as a final appraisal with respect to the previous year and as a needs assessment prior to the start of another year.

A final review is not an isolated activity, scheduled for a short time period. Throughout the progress of the volunteer program and other volunteer services activities, watchful eyes presumably have been monitoring the many facets of volunteer operations All the information gathered during the school year and used to change, modify, delete or expand any program components should now be reviewed.

If the monitoring information was valid and complete, there will be little additional information needed at this time. Although some information can obviously be obtained only after a certain length of time has elapsed. Nevertheless, it is at this time of final review that much of the record-keeping performed for monitoring purposes will be most appreciated.

## COMPARING PLAN TO ACTUAL

What information should be sought during the final review stage? Once again it will be necessary to examine the original program descriptions and objectives. It is always assumed that the plan as established at the beginning of a new program represents the ideal toward which all program efforts are directed. This does not suggest that programs remain unchanged; in fact, much of the monitoring data suggest and support program changes. These changes, however, become incorporated into a <u>revised</u> program description and set of objectives so that by the end of the year a <u>new</u> plan has emerged.

The first step, then, is to examine the current program description, along with program goals and objectives, policies, procedures, and materials. These must be compared to the original set. Any changes must be noted and supporting information should be made available.

All aspects of the Volunteer Services System must be examined. Examples of questions which require answers are:

- Was the orientation for school personnel satisfactory?
- Was orientation/training of volunteers satisfactory?
- Were school needs adequately assessed? Programs clearly identified?
- Was school climate conducive to volunteer activities throughout the year?

- Were program goals and objectives fully delineated and understood by all involved? Were they realistic?
- Were program policies and procedures consistent or in conflict with those of the school system?
- Were job descriptions accurately conveyed to all program participants?
- Was evaluation information processed properly? Was the information useful to decision-makers?
- Were materials complete and readily available?
- Did recruitment efforts result in desired numbers of volunteers?
- Has volunteer retention and drop-out rate been assessed?
- Were interview, screening and placement procedures satisfactory to <u>all</u> parties?
- Were staff-volunteer relationships positive?

These are some of the questions to be answered. Most of the data needed in order to provide the answers should have been obtained throughout the monitoring period. It is necessary, during the final review period, to compile all the data into a comprehensive report which summarizes the entire year's activities.

STEPS OF EVALUATION

All evaluations, regardless of their purposes include a series of steps. Thus, a final appraisal involves:

- <u>Focusing</u> the evaluation (what decisions are to be served?)
- <u>Collecting</u> the information.
  <u>What</u> data are needed?
  From <u>whom</u>?
  <u>How</u>? (With what instrument?)
  <u>When</u>? (What is the schedule for collecting needed information?)

- Organizing the information.
  Who will keep it? Where? How?
- Analyzing the information.
  What statistica processes will be applied?
- Interpreting the results.
  What do they mean in relation to the program decisions?
- Reporting the findings.
  Letting all appropriate personnel know findings and/or basis for any resulting decisions.

Additional information is usually needed for questions which cannot be answered until after the year is over. Examples of such questions for which data will have to be obtained at final review time are:

- How has academic achievement of students been affected by the volunteer program?
- What new needs exist which should be alleviated in the coming year?
- What new resources are available now which were not available during the previous year?
- What changes in school or community climate might affect the program design for next year?
- How many volunteers have signed up for next year?

A few sample final appraisal instruments appear in the Appendix. All data obtained, both through monitoring and final appraisal activities, should be compiled and analyzed. This will then offer a comprehensive evaluation of all areas of the Volunteer Services System including:

- Program processes
- Program materials and resources

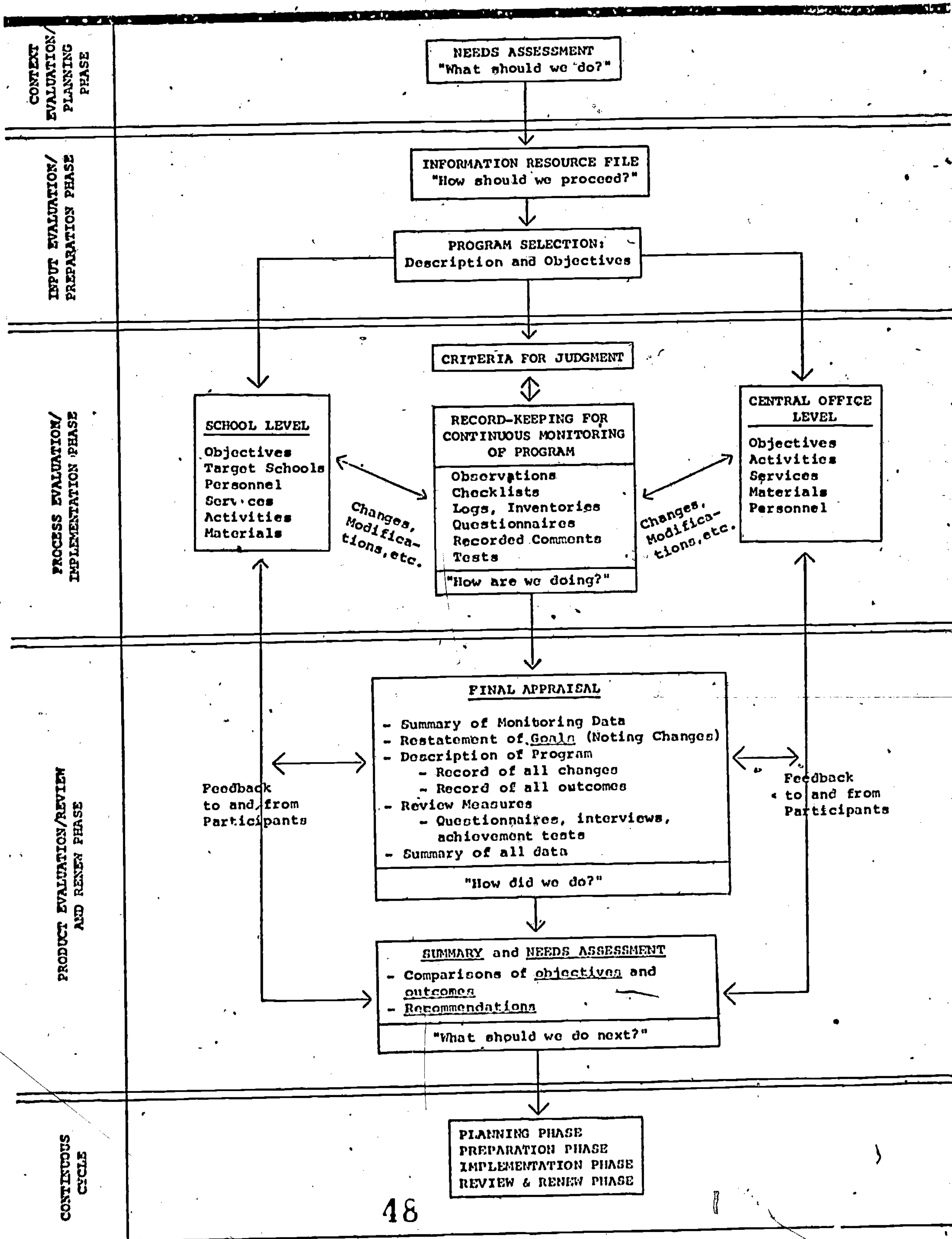
- Communication processes
- Services provided by the volunteer program
- Services provided by volunteers in the program.

By comparing data showing what actually occurred with objectives specifying what was desired, it will be possible to note deviations from the original plan and program deficiencies which were not corrected during the program year. Once the discrepancies have been identified, it is time to take whatever corrective action is necessary. As indicated earlier, a final appraisal is not only a judgment effort, but also a needs assessment activity and should be utilized as such to plan (to renew or to alter) the volunteer program for the following year.

Questions require answers, and answers always generate new questions. Having answered, "How did we do?", it is now necessary, as in the beginning, to ask, "What should we do?".

As a summary, the chart on the following page depicts the interrelation and cyclical nature of all phases of the evaluation/information system.

# MODEL FOR AN INFORMATION SYSTEM

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# V.S.M.S. Project Goals & Synopsis 1973-76

1. **Management System**
   To establish a management system for the administration of a volunteer services system in a city school district.

2. **Community — School Relationship**
   To provide a concrete and positive working relationship between school personnel and the school community.

3. **Program Development**
   To meet the changing needs of students for volunteer services by developing new volunteer programs and by modifying and/or expanding existing volunteer programs.

In 1973, the Volunteer Services Office of the Columbus Public Schools was awarded a three-year grant by the Ohio Department of Education, TITLE III Office. The grant called for the design, development, implementation and installation of a new system for utilizing large numbers of trained volunteers to meet student needs as they are identified by certified personnel.

Once designed and operable, this new management system should allow for the development of new volunteer programs based upon teachers' requests and for exciting and challenging opportunities that will strengthen school-community relationships.

To judge the effectiveness of this new operational mechanism, the criteria for the management system states that the system is to be meaningful and workable at all levels of the volunteer services system, that it is flexible enough to handle the magnitude and variety of newly assessed needs, that it is generalizable enough to operate in a variety of school systems, that it is capable of continuous expansion, and that it serves the needs of the students, the volunteers, the certified staff and the school system.

During the three-year grant period, the project mission was to develop generalizable process models for each facet of the management system during the first year, to pilot test the models and revise them during the second year, to install the materials and procedures for this new system throughout the school system during the third year.

The management system procedures and processes can be found in the guidebook for a volunteer services system and in the handbook series developed by the project staff. An annotated bibliography is also being developed to assist others in seeking additional reference materials for the various aspects of a volunteer services management system.

Volunteer Management System Materials

HANDBOOKS

I GUIDEBOOK TO A VOLUNTEER SERVICES SYSTEM
II ORGANIZING A VOLUNTEER SERVICES SYSTEM
III INFORMATION SYSTEM FOR A VOLUNTEER SERVICES SYSTEM
IV VOLUNTEER PROGRAM OPERATIONS
V VOLUNTEER PERSONNEL OPERATIONS
VI SCHOOL VOLUNTEER OPERATIONS

NEWSLETTER

"THE VOLUNTEER"

PAMPHLETS

VOLUNTEER MANAGEMENT – HOW TO ASSESS NEEDS
ADVISORY COUNCIL HANDBOOK
SCHOOL ADMINISTRATOR'S PAMPHLET
TEACHER HANDBOOK
INTERVIEWER'S HANDBOOK
VOLUNTEER HANDBOOK
HANDBOOK FOR VOLUNTEER TRAINING
AUDIO-VISUAL HANDBOOK
HOW TO RECOGNIZE AND RETAIN THE VOLUNTEER
HOW TO WORK WITH GROUPS
HOW TO CONDUCT MEETINGS
SCHOOL VOLUNTEERISM – ITS UPS AND DOWNS