

Volunteer Correction for Success Process & Form

Use this progressive discipline process and template to serve as an official written warning to alert a volunteer that corrective action is required or dismissal will result.

Progressive Discipline is a system of discipline where the penalties increase upon repeat occurrences. The process should be clearly defined in the volunteer handbook, including reasons for immediate dismissal. We suggest using a softer term, such as Volunteer Correction for Success, to identify this process.

Every conversation should be documented. For verbal coaching, simply note them in the volunteers' file. For more official, written warnings, see the page 2 of this handout.

- **Step 1: A Casual Conversation** (still needs to be documented)
 - Emphasis on CASUAL.
 - Why are you here? Poor performance, bad attitude.
 - Add in praise from past performance.
 - Address the situation at hand directly.
 - Take notes, just a date and a quick summary is fine.
 - Discuss the next steps.
 - Always wrap up with gratitude.

- **Step 2: A Formal Meeting** (with official correction form completed)
 - If you get to this step, you will be grateful for this process.
 - Invite a colleague to come into this meeting with you if possible.
 - Refer to conversation from Step 1.
 - Refer to volunteer handbook policies for success.
 - Address the situation at hand directly.
 - Take notes using your official form (see last page).
 - Define next steps and plan for follow-up.
 - End with gratitude.

- **Step 3: Dismissing a Volunteer**
 - You are the messenger and you have put a lot of thought into this decision.
 - Refer to Steps 1, 2, and the current situation.
 - Open discussion about how you got here.
 - Collaborative discussion about your future relationship.
 - If possible, end with gratitude.

Volunteer Correction for Success Form

[Insert agency logo]

Volunteer Name: _____

Date/time/location of conversation: _____

Staff person in charge of meeting: _____

Meeting Attendees: _____

Description of purpose for this meeting, **include reflections from Step 1:**

Notes from discussion with all involved about why you are having this meeting, include all relevant details and comments from attendees (use back of page if necessary):

Next steps: Discuss what corrective action needs to take place and plan for timely follow-up.

Signature of Lead Staff Person: _____

Signature of Volunteer: _____