

Quick Reference Guide – Managing Volunteer Performance Concerns

Purpose: Use this quick guide when a chapter volunteer is not meeting expectations. The goal is to respond early, fairly, and respectfully while protecting other chapter volunteers, chapter members, and the chapter as a whole.

1. Clarify	Name the expectation, gather objective examples, identify the chapter impact, and determine whether the concern is minor, repeated, or serious.
2. Coach	Meet privately. Thank the volunteer, describe the concern, explain the impact, ask for their perspective, and confirm what needs to change. <i>Note: It's best not to assume intent. Go into the conversation with an open mind.</i>
3. Support	Offer reasonable help when appropriate, such as refresher training, mentoring, clearer expectations, or reassignment.
4. Follow Up	Set a timeline, document commitments, schedule a follow-up date, and review whether expectations are being met.
5. Escalate	Consult your Regional Executive, pause role activities, or end the role when concerns continue, affect others, or disrupt the chapter.

Coaching conversation structure: Thank the volunteer. State the expectation. Share objective examples. Explain the chapter impact. Ask for their perspective. Agree on support, next steps, timeline, and follow-up date.

Note: Keep an open mind and do not make assumptions about the volunteer. It may be the volunteer does not fully understand their role or what is expected of them. Or, they may have a personal matter that may be affecting their role.

Escalate sooner when: The concern involves safety, confidentiality, harassment, discrimination, boundaries, member trust, chapter reputation or continued failure to improve after coaching and support. If the behavior is a violation of HFMA's Code of Ethics, report to hq through [this form](#).

Follow up: Send an email to volunteer with follow up items and next steps.

Coaching script: "Thank you for meeting with us. The expectation for this chapter role is [expectation]. We have noticed [specific concern], and the impact is [chapter impact]. We would like to understand your perspective and agree on what needs to change by [date]. The chapter will provide [support], and we will follow up on [date]."

Ending-the-role script: "After reviewing the expectations and concerns we discussed, we have decided it would be in the best interest of the chapter to end your volunteer service in this chapter role, effective [date]. We appreciate what you have contributed. T," If applicable, discuss if there is another role that may be a better fit or move to a supporting role (if they are a committee chair/co-chair).