

Toolkit for Managing Volunteer Performance Concerns

This toolkit is designed to help chapter leaders address volunteer performance concerns in a consistent, compassionate, and practical way. Leaders can use these tools to assess concerns, prepare for coaching conversations, document next steps, and communicate decisions clearly.

Tool 1: Quick Decision Guide

Situation	Recommended First Step	When to Escalate
Minor or first-time concern	Have a private coaching conversation and clarify expectations.	If the concern repeats or affects chapter volunteers, members, or programs.
Skill, training, or role clarity gap	Provide refresher training, mentoring, written expectations, or shadowing.	If support is provided and the volunteer still cannot meet expectations.
Attendance, responsiveness, or reliability concern	Discuss the pattern, confirm availability, and agree on specific next steps.	If missed commitments create extra work, disrupt chapter operations, or continue after coaching.
Interpersonal or conduct concern	Address the behavior promptly and focus on expectations for respectful interaction.	If the behavior affects other volunteers or members, damages trust, or violates conduct standards.
Safety, confidentiality, harassment, discrimination, boundary, or serious policy concern	If the behavior is a violation of HFMA's Code of Ethics, report to hq through this form .	

Tool 2: Coaching Conversation Worksheet

Prompt	Leader Notes
What expectation is not being met?	
What specific examples can be shared objectively?	
How is this affecting chapter volunteers, members, programs, or the chapter as a whole?	
What support, clarification, or training could help?	
What outcome is needed, and by when?	
What follow-up date should be set?	

Tool 3: Volunteer Improvement Plan Template

Field	Details
Volunteer name	
Chapter role	
Date of conversation	
Expectation or responsibility to improve	
Specific action needed from the volunteer	
Support the chapter will provide	
Timeline for improvement	
Follow-up date	
Possible next step if expectations are not met	

Tool 4: Documentation Form (as needed)

Item	Notes
Volunteer name and chapter role	
Date, time, and location	
People present	
Concern discussed	
Objective examples	
Impact on chapter volunteers, members, programs, or chapter operations	
Volunteer response or context shared	
Support or options offered	
Agreed-upon next steps	
Follow-up date or final decision	

Tool 5: Difficult Conversation Script Card

Opening: “Thank you for meeting with us. We appreciate the time you have given to the chapter and the care you have shown for the mission.”

State the concern: “The expectation for this role is [expectation]. We have discussed [specific concern or pattern], and it has affected [chapter volunteers, chapter members, programs, or chapter operations].”

State the decision: “After reviewing the situation, we have decided to [continue with a support plan / pause your volunteer service / end your volunteer role], effective [date].”

Close respectfully: “We understand this may be disappointing. We appreciate what you have contributed, and we will follow up with any next steps.”

Tool 6: Follow-Up Communication Templates

After a coaching conversation: Thank you for meeting with us on [date] to discuss your chapter role. As discussed, the expectation is [expectation], and the next step is [specific action]. The chapter will provide [support]. We will check in again on [date] to review progress and determine whether any additional support or changes are needed.

After a role pause: Thank you for speaking with us on [date]. As discussed, your volunteer service in the [chapter role] role will be paused effective [date] while we review next steps. During this pause, please do not report for scheduled activities or represent the chapter in this role unless contacted by a chapter leader. We will follow up by [date] with additional information.

After ending a volunteer role: Thank you for the time you have given to the chapter and for your interest in supporting the mission. As discussed on [date], your volunteer service in the [chapter role] role will end effective [date]. This decision is based on [brief factual reason]. Please let our chapter leadership team know if you have any questions.