Retention and the Volunteer Experience: An Organizational Perspective

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This thesis is dedicated to my wonderful support system. This project would not have been possible without the love and encouragement of Kapatryc Stanley, friends, and family-- especially my mother Wanda Bynum Duckett, sister Lauren Bynum, and brother Tory Duckett.

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# Summary

Volunteer retention affects both volunteers and the organizations they serve. Previous research is almost exclusively from the volunteer's perspective, while much of what retains them is based on the agencies they work in. Despite a shortage of studies analyzing the effects of organizational context on volunteering, organizations greatly shape the volunteer experience and exploring their perspectives on retention contributes to a more complete picture of the volunteering phenomenon. This study used grounded theory methodology to describe and better understand how nonprofits think and strategize about volunteer retention. Using a semi-structured format, 20 participants were interviewed from nonprofits that use volunteers as their primary work force. I concluded that volunteer retention is less about direct retention strategies and more about how organizations create the volunteer experience. The themes central to creating the volunteer experience are volunteer selection, volunteer management, and relationship building. I propose that organizations go through these three processes when retaining volunteers, and think about retention in terms of these features.

## I.    Overview

This project addresses how organizations that use volunteers as their primary work force approach volunteer retention. Volunteers are an increasingly fundamental part of society. With the downturn in the economy, and initiatives such as President Obama's National Day of Service (Courson, 2009), nonprofit and charitable organizations have more volunteers (Silverman, 2002). In 2009, 63.4 million Americans, 26.8% of the population, participated in some form of volunteer activity. This marks a statistically significant increase of 1.6 million people from 2008 (Corporation for National and Community Service, 2010). This constitutes 8.1 billion hours of volunteer service, worth $169 billion (Independent Sector.org, 2010). Despite increased participation in volunteer activities, organizations struggle with volunteer retention (Jamison, 2003).

Retention is paramount to the survival of any volunteer based organization (Jamison, 2003; Hager & Brudney, 2004). Nonprofits often have policies and strategies that regulate volunteer activities, and staff members hold their own opinions on how best to retain volunteers. Organizations play a direct role in many of the factors volunteers have identified as influencing retention. Although volunteering takes place in a context, studies analyzing the effect of this context are sparse (McBride & Lee, 2012). This is especially concerning given that organizational factors explain more statistical variance in volunteer commitment, satisfaction, and tenure than attitudinal, motivational, or demographic factors (Cnaan & Cascio, 1999).

In a study on institutional predictors of volunteer retention, McBride and Lee (2012) found that, among AmeriCorps volunteers, institutional factors play a large role in increased retention (i.e. completion of volunteer service contracts). They write that "members are more likely to complete their terms of service if the program sites involve the members in planning

their service activities, match the volunteer activities to the members' career interests, help members develop a relationship with a mentor, and facilitate members' reflection on the service experience with others" (pg. 395). Such a recommendation on how to retain volunteers is informative but one-sided. All participants were current AmeriCorps volunteers, and this study is limited to their views. What remains missing from the discourse at large is the perspective of the organization on volunteer retention.

Wilson (2012) reviewed the volunteerism research since 2008 and concluded that "the *experience of volunteering* remains somewhat neglected, particularly the influence of the *social context of volunteer work* on the volunteer's satisfaction and commitment [emphasis added]" (pg. 177). The research consistently shows that decreased satisfaction and commitment to a volunteer opportunity results in higher turnover (Miller, Powell, & Seltzer, 1990; Cyr & Dowrick, 1991; Price, 1977; Jamison, 2003). Neglecting the context of volunteering, is neglecting a fuller view of retention.

The current study uses grounded theory methodology to provide a rich description of volunteer retention from the perspective of the organization. This was done by examining how organizations think about retaining volunteers over long periods of time, and the strategies or processes they use to do so. The organizational perspective on volunteer retention has not been adequately explored, and without a substantial body of literature on the topic it is important to let the data drive the exploration of this phenomenon.

## II.     Defining Volunteerism

Any discourse on volunteering should begin with a precise definition of the phenomenon. Throughout this study volunteering is defined as any activity in which time is given freely to profit another person, group, cause, or organization (Wilson, 2000). Volunteers are those that engage in such activities. This definition is purposely broad, and has no parameters concerning motivation or span of time. Given this, altruistic or value based intentions are not necessary to categorize an action as volunteering. Wilson states it best when he writes that: "Unlike the spontaneous help given to the victim of an assault, where it is necessary to decide rapidly whether or not to take action and the encounter is brief and often chaotic, volunteerism is typically proactive rather than reactive and entails some commitment of time and effort (Wilson, 2000 p. 216)."

With this meaning in mind, both the literature reviewed and the organizations recruited for analysis have ongoing projects as opposed to short term initiatives. Hidalgo and Moreno (2009) found that volunteers stay at one place for an average of one and a half years, with approximately 35% of volunteers leaving before they complete one year of service at a given location. My study focuses on how organizations retain volunteers over time; and with a large amount of volunteer loss happening within the first year of service, I am only targeting organizations that need volunteers for longer than a year. Arguably, the experience of an organization that needs volunteers for less than one year may differ from an organization that seeks to retain the 35% of volunteers that they may naturally lose in a year. Those that rely on volunteers indefinitely may have different strategies for retaining them than those that need them for a single short term event (i.e. less than one year). Being that my interest is in long term retention, only organizations with initiatives lasting longer than one year will be recruited.

Some scholars also distinguish between advocacy and volunteering. Agencies that recruit and retain volunteers may be categorically different from those that recruit and retain advocates. What encourages advocates to stay at an organization likely differs from what incites volunteers to do so; it is appropriate to study them separately (Markham & Bonjean, 1995; Eliasoph, 1998). Organizations with a clear political agenda are thus excluded from review. For example, on the topic of abortion, organizations with a clear pro-choice or pro-life agenda were not included in this examination. However, an organization that teaches safe sex and/or abstinence, counsels women that had undergone abortions, or seeks resources for teen mothers would be eligible for inclusion. Similarly, organizations that lobby for universal health care would be excluded, while organizations delivering health services, support, and resources to the ill would be eligible for inclusion.

## III.    Literature Review

Evidence from both the volunteerism and community participation literatures have suggested that the following aspects of organizations are related to volunteer retention: role identity, the function that volunteerism plays in one's life, organizational structure, social climate, and volunteer integration. These theories are discussed in isolation in the literature. None of these frameworks encompass the retention process in its entirety, nor do they directly inform, refute, or support one another. A holistic description, then, involves considering and integrating these ideas as appropriate.

### A.  Role Identity

Louis Penner (2002) defines volunteer role identity as "the extent to which a person identifies with and internalizes the role of being a volunteer; that is, the extent to which this role and the relationships associated with it become part of a person's self-concept" (p. 463). Penner found that volunteer role identity mediated the relationship between initial volunteer experience and sustained volunteerism. Similarly, perceived expectations and role identity were found to be correlated with length of time volunteering (Finklstein, Penner, & Brannick, 2005). The researchers make it clear that this finding allows for differentiation of involvement among active volunteers. Volunteer role identity does not predict who will volunteer, but rather who will be most devoted. It also does not address an organization's role in promoting or discouraging this process.

### B.  Functionalist Approach

In contrast to volunteer role identity theory, those that support the functionalist approach posit that volunteer retention is linked to the use that volunteering has in people's lives. Clary

and colleagues (1998) suggest functions including value (seems like the right thing to do), understanding (new learning experience and skills), social (be with friends or do something that is viewed favorably), career (learning or practicing career relevant skills), protective (ease guilt and negative feelings about one's self), and enhancement (personal growth). The results of this study found value and enhancement to be the greatest predictors of continued volunteering. Stuckas, Daly, and Cowling (2005) found that gaining social capital is also a beneficial function of volunteering. Here, the merits of social capital are described as generalized trust and psychological sense of community.

## C. Organizational Integration

There are also a number of organizational factors that have been found to bear on volunteer retention. Hidalgo and Moreno (2009) found that the level of integration into the organization influences volunteer retention. The social network (relationships with members of the organization) was the strongest predictor of intention to continue volunteering, with more positive networks resulting in increased intent to remain with the organization. Organizational support, positive task, and training were also significant predictors of intention to remain. A national survey of charitable organizations (Hager & Brundey, 2004) found that, of nine recommended volunteer management practices, those based on heightening the volunteer experience were most related to retention: recognizing volunteers, providing training and professional development, and screening volunteers/matching them to organizational tasks. Here, all of these concepts are housed under the topic of organizational integration because they all describe a way that organizations can make volunteers be, and feel like, a salient part of the organization.

## D. Organizational Structure

The concept of organizational structure as a prominent factor in volunteerism comes from the citizen participation literature. Citizen participation is the process wherein people actively take a part in decision making in the environments that affect them. This is not volunteering as previously defined; however, this literature represents a subset of volunteers and is helpful in understanding volunteering more broadly.

Knoke and Wood (1981) and Checkoway and Zimmerman (1992) both found that the perceived adequacy of the organization was more related to the quality of participation than its external strategy. Similarly, in a study of nonprofit neighborhood organizations Ohmer (2008) found that the more well-run and effective volunteers perceived the organization to be, the more members benefited from their involvement.

Steers (1997) describes organizational structure as the way an organization arranges its resources for goal directed actions. This includes the level of formalization (i.e. how clearly defined are the rules and procedures), control, and the specialization of tasks and roles. There have been mixed findings surrounding whether citizen participation increases with formal vs. informal organizational structures. Smith (1966) states that volunteers prefer formal, clearly defined procedures, over informal structures. In a study on neighborhood associations, Milburn and Barbarin (1987) found a relationship between the structure of an organization (formal vs. informal) and member involvement; with more structured organizations showing higher member involvement. Wandersman and Florin (2000) suggest that more structured organizations set out clear roles, responsibilities, and procedures, allowing for volunteers/members to find a niche and successfully fulfill it. This increases the involvement and commitment of the volunteer/member, and benefits the organization as a whole. Barnes and Sharpe (2009), however, posit that a more informal network-based organizational structure has been effective in recent years. Based on a

case study of a Toronto park "association", it was found that traditional volunteer management structures hindered participation and decreased retention.

**E.  Social Climate**

Social climate is just as important as organizational structure in the citizen participation literature. Wandersman and Florin (2000) described social climate as the personality of an organization. A notable study on this topic in the citizen participation literature came from Florin and colleagues (1990) through the reanalysis of data by Giamartino and Wandersman (1983) using the Group Environment Scale (Moos, 1987). It was found that the average time involvement of members is higher in groups with the following social climate characteristics: high cohesion (i.e. camaraderie and "team spirit), low tolerance for actions not coordinated with the group (i.e. too much independence), high encouragement to share (i.e. personal feelings, information), and high tolerance for criticism (i.e. disagreements, negative feelings).

## IV.    Ecological Framework

While this literature provided a starting point for thinking about retention, it does not speak to the ecology of volunteerism in organizations. Much of the literature deals with the individual volunteer level of analysis rather than the organizational perspective. While the organizational structure and social climate literatures provide guidelines which inform the present study, they do not address the complexity of the environment as a system. Understanding retention in nonprofits ecologically helps to provide a more holistic picture of retention, and highlights the dynamic lived experiences of organizations and volunteers. The current study provides a grounded theory based description of how organizations think about retaining volunteers over time, and the strategies or processes they use to do so.

Guiding this research is an ecological framework. The ecological framework is reflected in not only the content of the interview, but encourages sampling a wide range of organizations. Interviewing a variety of organizations allows for a broad sense of diverse ecologies and how retention is approached within them.

In order to retain volunteers an organization is in competition with everything else they could potentially be doing, and organizations that rely on volunteers as their primary workforce have unique ways of overcoming this obstacle. No two organizations are identical, and these differences are reflected in how they approach retention; an ecological perspective lends itself well to understanding this process. More specifically, Kelly (1968) outlines four principles central to the ecological approach: adaptation, succession, cycling of resources, and interdependence. These principles were used to focus the research question, as well as the sampling, data collection and interpretation processes.

The adaptation principle posits that in order to thrive, an organization must adjust to its environment. Volunteer recruitment and retention processes represent organizational efforts to adapt. The adaptation principle suggests that questions about responses to challenges, and how the organization shapes itself toward the goal of retention are important to understanding the organizational ecology. For example, has the organization changed to better retain volunteers? How do organizations require volunteers to adapt to the environment?

The succession principle refers to the history of an organization. The history of an agency's ecology of volunteerism affects how they currently approach retention. One of the aims of the interview was to get a rich description of the organization, and understand the origins of its need for volunteers. For example, what past factors have affected retention?

Trickett and colleagues summarized the cycling of resources principle, when writing the following:

> To think ecologically is to consider how persons, settings, and events can become
> resources for the positive development of communities; to consider how these
> resources can be managed and conserved; and to approach research so that the
> effort expended will be helpful to the preservation and enhancement of
> community resources (Trickett, Kelly, & Vincent, 1985, pp. 283-284).

This principle suggests that volunteer dependent organizations think and strategize about preserving volunteers as a resource. I am interested in how events and settings are used to retain volunteers. Are special settings created for volunteers to learn about the organization? Are events held to make volunteers feel valued?

The principle of interdependence refers to the reciprocal interactions among parts of the system. In organizations, this system includes structures, norms, attitudes, and policies (SNAP, Trickett & Birman, 1989). Thinking of organizations in terms of their SNAP provides a way to characterize these environments, their basic similarities, and their complex differences. To understand the ecology and its interdependence the interview included questions about how different components of the organization interacted to retain volunteers. For example what are the ripple effects of structural changes in the organization? All of these factors affect recruitment and retention, and the interview draws on them to better understand the ecology of volunteerism from an organizational perspective.

## V.      Developing the Interview

I used a qualitative interview to document the perspective of organizations on long term volunteer retention, and then used the data to describe the retention process. In the spirit of the methodology, the interview consisted of broad open ended questions, and followed with more directed probes as necessary. The broad questions asked participants to discuss how their organizations think about retaining volunteers; as well as activities implicitly or explicitly directed at retention. The ecological framework guided the interview questions (see above), while both this framework and the volunteerism literature directed the follow up probes. The interviews were conversational, with probes chiefly being used to clarify ideas brought up by participants. This type of questioning allowed the experiences of the organizations to emerge without any direct assumptions being made about what should or should not be discussed.

Participants tended to go into a lot of detail when asked these questions; however, probes were used when more information was needed. The probes follow the previously mentioned frameworks. For example, organizational structure probes included the topics of training, volunteer tasks and roles, formal vs. informal organizational practices, and the relationship between retention and to organizational structure. Probes about social climate included questions such as what is it like to work at your organization, and does your organization have any policies aimed at creating a certain social climate? Organizational integration topics contained probes about social networks and support systems.

<center>**VI.    Method**</center>

**A.  Participants**

This research was conducted in a Midwestern metropolitan area. 20 participants from 20 nonprofit organizations took part in this study. Not all participants were volunteer coordinators but they all worked with, and had insight into, the volunteer retention process. Participants were gathered using a purposeful sampling maximum variation strategy until saturation was reached (Miles & Huberman, 1994). Organizations were found through existing networks and websites dedicated to finding volunteer opportunities in the area. Those found online were contacted through their volunteer ads on these websites.

Organizations younger than 3 years were excluded from the sample. For very young organizations, retention strategies cannot be expected to have fully emerged, and the trial and error process of brand new organizations is not being studied here. Nonprofits with an explicit political agenda, and volunteer opportunities that were linked to a single event or short term initiative (i.e. less than one year) were also excluded.

**B.  Data Collection**

Before beginning formal data collection, the interview was tested with a pilot study. The pilot participant answered all interview questions, discussed, and critiqued the interview with the researcher. The interview was modified per their suggestions before being administered to other participants. This participant met all criteria for inclusion, but their data was not included in the final analysis.

For each agency the contact information for potential volunteers was used, and individual participants were chosen based upon the volunteer contact person's recommendation. In every

organization I was directed to a single person who was best equipped to discuss retention. Interviews lasted for approximately 1 hour. When an organization had more than one ongoing program, the program associated with the volunteer recruitment ad on the website was used. Interviews were conducted at the time and location that was most confidential and comfortable for participants; this ranged from private offices to coffee shops.

Before beginning each interview the researcher read a short description of the study (as seen in Appendix A) and outlined what the interview would be like (i.e. how long it would last, types of questions). Participants were allowed to stop at any time and skip questions if they became uncomfortable. They were also encouraged to ask questions if something was unclear during the conversation. After explaining the format participants were asked to give informed consent for both them and their organizations. Organizational informed consent was obtained through a letter of support that participants had been asked to supply. At the end of each interview the participant was compensated with $15 cash.

The interview was semi-structured but, where appropriate, clarifying questions were asked. The interview followed the natural flow of the conversation: many questions were asked out of order, participants were asked to elaborate some points, and in a few cases questions were omitted. When new questions were asked, they were included in subsequent interviews. Interviews were audio recorded, transcribed, and coded as data were collected; this constant comparative method (Patton, 2002) ensured that data gathered from previous interviews adequately informed later ones. As a result no two interviews were identical, however the focus remained consistent. For example, the first few participants expressed a reliance on the internet for recruitment. In all subsequent interviews where the internet was not named as a recruitment tool, participants were specifically asked whether they had an online presence. Some participants

were expressly asked while others were not, but the topic was always discussed. At the end of each interview participants were encouraged to ask questions, or share relevant information that was not previously discussed.

## C. Data Analysis

Grounded theory techniques were used to organize and analyze this data as described by Strauss and Corbin (1998). The coding manual, and a brief description of each code, can be found in Appendix B. It began with microanalysis, "the detailed line by line analysis necessary at the beginning of a study to generate initial categories" (Straus & Corbin, 1998). Through this line by line analysis preliminary codes emerged across interviews and the open coding process began.

Open coding started by collapsing similar codes into categories and organizing them thematically. These themes were expanded to include properties and dimensions. Properties are the characteristics of each category or theme, while dimensions are the range along which a property varies. A coding guide was created at this stage using the themes, properties, and dimensions found during open coding. In vivo codes (Strauss & Corbin, 1998), codes named using the exact words of participants, were used whenever possible. This guide was then used to analyze the data. Each transcript was read three times to thoroughly categorize participants' words and meanings into codes.

The final step is axial coding. "In axial coding, categories are related to their subcategories to form more precise and complete explanations about phenomena" (Strauss & Corbin, 1998). However, because the current study does not aim to develop a grounded theory, the axial coding process was excluded.

## D. Reliability and Member Checking

Multiple measures were taken to ensure the quality of these analyses: inter-rater reliability and member checking. The principle investigator and a graduate student both coded 10% of the interviews. The coding guide and many of the interviews were complete at this stage of the research process. Initial reliability was low at 26.3%, and revealed differences in coding technique rather than interpretation. One rater tended to choose a single unit of text to represent a single code, while another coded a larger unit of text to represent multiple codes. This was discussed and both agreed that a single unit of text had to be meaningful (i.e. be more than a word or phrase) but did not have to represent a participant's full thought on a topic (i.e. full sentences or groups of sentences). For example, if the beginning of a sentence represented a different code than the rest of the sentence, and when taken alone was still meaningful, it could be coded separately as a unit of text. This is in contrast to coding complete sentence or group of sentences together, when they represent different ideas. After a retraining on the coding guide, and the use of a single coding method, the raters met to reconcile coding disparities and reached - 94.6% agreement.  The coders agreed at the dimension level. With such high agreement at a detailed level, it was not necessary to change the coding scheme or revisit previously coded interviews.

In qualitative research the importance of member checking cannot be overstated. The data should represent the voice of the participants, and only the participants themselves can validate whether this is true. 10% of participants were contacted to validate the results, and all agreed that it represented their views and experiences. These participants were randomly chosen to be given a truncated version of the results and discussion section and asked for comment. All participants agreed with the results as described below.

## VII. Description of the Sample

The ecological framework encourages sampling a range of organizations. As a result, the organizations interviewed represent a range of ecologies. These agencies differ in many ways, including mission, longevity, size, and volunteer specific staff roles. These dimensions highlight variations in ecologies that affect the retention process.

Organizational missions ranged from healing the ill, to supporting children's education, resettling refugees, sheltering and feeding the homeless, counseling, and a broad range of social services. Agencies with different aims vary in how they carry out their mission. For example, hospitals have governing bodies such as the Occupational Safety and Health Administration (OSHA) and local accreditors. Given this, the hospitals sampled had external limitations on what kinds of tasks volunteers could do, and standardized trainings like HIPPA (Health Insurance Portability and Accountability Act) were required. Given the mission of hospitals, their ecology differs from that of an educational support agency. When serving vulnerable populations risk management is critical, and application processes that include background checks and references are more common. Missions that inherently require volunteers to have a lot of contact with clients have different ecologies around volunteerism than those that do not. For instance, in a hospital environment no volunteer would operate on a patient, however, in a youth center volunteers are mentoring and tutoring children. The mission is one range along which ecologies differ. As the goal of the organization varies, so does its approaches to volunteers to help reach that goal.

All of the nonprofits sampled were founded between 1893 and 2007, with most beginning after the 1970s. The ecology of a 100 year old organization and a 10 year old organization likely

differ in many ways. The life of a nonprofit can be very volatile, with high staff and volunteer turnover and funding crises being the norm. Those that survive for decades have been highly adaptive and able to successfully fill a niche. These places have longer histories and more institutional knowledge on what has and has not worked in the past. Although long standing nonprofits have had more time than younger ones to gain a reputation and figure out what works for them, these places are not inherently more adaptive than their newer counterparts. Older nonprofits tend to be larger, and slower to change than those that are still molding who they are, what they do, and how they do it. While the 6 year old youth recreation agency does not have the benefit of history that the large 96 year old social services provider does, it may be more likely to try new retention strategies. A 96 year old organization may has deeper roots in a community, however the more junior organization is able to assess how it wants to position itself in the community as it currently is. How senior and junior organizations approach retention, and how they are able to use their histories, or lack thereof, as a resource affects how they approach retention.

The organizations sampled also varied in size: from having 1 employee and 4 volunteers, to 3,000 employees and 17,000 volunteers. The larger agencies tended to be more formalized. Having thousands of staff and volunteers over a number of sites is a different environment than a few employees working with a handful of volunteers at a single location. The demands on retention alone create different ecologies in these settings. For a tutoring center to lose one volunteer when they only have four has a very different effect on the organizational system than when there are thousands of volunteers, and organizations likely govern themselves with this in mind. How many volunteers an agency needs bears on how they recruit and retain volunteers. The small social service agency needing only 13 volunteers was able to be pickier about who

they recruit and retain than the emergency services organization that needs thousands. Ways of managing, tracking, engaging, and retaining volunteers changes with size, and represents a range along which ecologies differ.

The presence of a staff member whose job is to manage volunteers, like a volunteer coordinator, differed between organizations. Some agencies did not have a distinct volunteer coordinator role because they could not afford the personnel, some do not see a need, while others felt they could not function without one. Volunteers must be managed to some extent, and nonprofits without a volunteer coordinator have ways of managing volunteers. A homeless services agency delegated volunteer responsibilities to multiple staff members, and as a result may approach retention differently than other organizations. For example, how a volunteer grievance was handled in this organization when it was someone's job to respond to it is different than when that responsibility was spread between three associate directors. An organization that does not need a volunteer coordinator likely has volunteer tasks that require little management. For example, a senior service center having five volunteers help serve food for a few hours a week could not justify the expense of a volunteer coordinator. A volunteer coordinator role represents an investment in volunteers, and the ecologies of those that are able to make this investment may differ from those that can or do not. The presence or absence of a volunteer coordinator role represents variations in organizational resources and potential capacity to manage volunteers, both of which influence the ecology of volunteerism in an agency.

The sample chosen was purposely diverse along these features, and interviews with them yielded descriptions of these multiple ecologies.

## VIII. Results and Discussion

Upon being immersed in the data it became clear that a grounded theory- based description of volunteer retention is less about direct retention strategies and more about how organizations create the volunteer experience. Creating the volunteer experience is thus the central organizing theme of this description. The sub-themes, or metacodes, that emerged as central to creating the volunteer experience are volunteer selection, volunteer management, and relationship building. The volunteer experience is not just about asking "what can I do to keep volunteers from leaving", but rather "what kind of environment can I create wherein retention can more easily happen". The director of a youth development agency (participant 1801) explains that "really the most important thing about keeping people around is providing the environment where they want to keep coming back, you know." However, he goes on to acknowledge that retention is not the only thing that his organization is concerned with by pointing out that "our mission is not just about retaining volunteers". The program director of a youth recreation agency (0401) agreed that "It really can't be an organization that spends the majority of our focus on the volunteers. It's that we wouldn't exist without volunteers so how can we collaborate, how can we work together with volunteers to help them produce the kind of work that they want to – that we want them to produce." The director of volunteers of a large home for the disabled (participant 1701) also notes that "it needs to be a good fit all the way around: staff, residents, and the volunteer not necessarily in that order. So I think that's really you know, really important." No organization's purpose is solely to cater to the needs of volunteers, thus the creation of the volunteer experience exists in a balance with the creation of an experience for both the staff and the clients. The term clients, here, refers to the person or

population that the organization serves. Client service can be directed at the individual, such as tutoring children, or indirect, like cleaning a public park.

Organizations go through the processes of volunteer selection, volunteer management, and relationship building when retaining volunteers, and think about retention in terms of these features. To clarify, these three processes include direct and indirect retention strategies. In all of the interviews, retention consisted of activities that organizations did purposely to create a certain volunteer experience, and consequences that happened as a result of creating the staff or client experiences. For example, organizations do not have volunteers complete an application just to potentially retain them. The volunteer application process can serve multiple functions and happen even if retention is not a priority, thus it is categorized as an indirect retention strategy.

## A. Volunteer Selection

The volunteer experience begins with the selection of volunteers. This metacode involves organizations selecting which volunteers will actually work with them and ultimately be retained, with properties including but not limited to advertising, how volunteers are recruited, and how applicants become volunteers. The volunteer coordinator at a refugee resettlement agency (0701) relayed the importance of volunteer selection when she said "I think it's really good that the initial intake process is so formal because I think that does leave us with a really dedicated pool of volunteers." Poor or careless volunteer selection may leave an organization with a pool of volunteers that are very difficult to retain, or that they do not want to retain.

### a. Recruitment.

The two properties of volunteer selection are recruitment and vetting. Recruitment involves how potential volunteers are attracted to the organization, while vetting is how potential volunteers are examined before being allowed to volunteer. Recruitment can happen inadvertently or as a result of a direct strategy. Inadvertent recruitment happens as a result of the organization's usual operations, for example, an organization's good reputation or current volunteers choosing to bring in potential volunteers. The inadvertent recruitment of one housing and development agency (participant 0101) is so strong that they do no other type of recruitment. When asked about recruitment the special projects manager shared that "Nothing is done on purpose, in that sense. It's more like… we're doing our work, we've been doing it for a long time, we have a proven result, good track record. We are approached by volunteers. We don't actually have a recruiting mechanism." While not having to recruit at all is an extreme case, many organizations found that a noticeable amount of their volunteers come to them because of their good name in the community. Snowballing, or current volunteers bringing in potential volunteers, was also noted by a number of organizations. The director of youth services of an educational support agency (participant 1201) explained that "Word of mouth is also very useful. We have volunteers who recruit other volunteers, their friends they come here too." The volunteer relations director of a social service agency (1401) happily declared "Well we're very lucky in a lot of respects because we have such a strong base right off the bat that a lot of the volunteers come in terms of word of mouth from other volunteers that have been doing it for awhile." Although these recruitment processes are not direct strategies that these organizations carry out purposely, the staff is aware of, and seems to count on, volunteers seeking them out. For some, this is attributed to their longevity in the community.

Advertising is the key dimension of recruitment as a direct strategy. Advertising happens through networking, having a presence in certain settings, and going through direct pipelines. Although current volunteers do bring in potential volunteers of their own volition, organizations can also push networking as a direct strategy to advertise their organization. The volunteer services manager of a hospital (0801) recounts a lack of success with this strategy: "So early on I tried doing some other kinds of activities. One year we had a Halloween get together. We've had different…this was recruitment, different recruitment events where current volunteers would bring a friend, a new volunteer, to a little social gathering. Not well attended. I think most of our volunteers have a very heavy schedule."

Advertisement through settings is what typically comes to mind as traditional advertisement. Organizations advertise through settings by having a presence in settings where one could recruit potential volunteers. This includes having an internet presence, postings on bulletin boards, making presentations at community meetings, etc. The volunteer coordinator at a long term homeless shelter (0501) extols the internet as the premier setting for recruitment when he asserts that "A lot of it is this thing. And if you don't know how to use this thing, computer, you're lost today. So before I arrived there was no social media admin. We had a facebook presence but they played with it. They never used it professionally. So if you're not on facebook, if you're not on twitter, if you're not on you tube, if you're not on every blog, if you're not associated with [1]*gettogether.com, if you don't know about organizations like *letsbenice.org or *helpout.org, you're lost. And that's where you attract volunteers. And everything's online." Many organizations agreed with him saying things like "recruitment with the internet is easy. At

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[1] *Identifying information was changed to protect participants' identities.

least for us...But if your institution is positioned out there on the internet that's your first good thing, and we are well positioned" (0801).

Other organizations have a more varied approach, taking advantage of a number of offline settings. The volunteer resources manager of an emergency services agency (2001) lists the types of setting that the recruitment team seeks out: "So one of the things, we do a lot of recruitment out, we go to fairs, we go to schools, we go to senior facilities, we go to find out where retired teachers are meeting and talk. A lot of presentations and outreach to recruit volunteers, a lot of posting with volunteer centers and *beapartner.com and different sites." Generally organizations are discerning about where they recruit, and position themselves where they are most likely to find potential volunteers that meet their needs. At a home for the disabled (1701) they look for potential volunteers that are more internally driven to be philanthropic, so that's "why we go out and talk to key clubs and national honor societies and stuff like that, those are the kids in the *Townsville public schools that often times have giving in their heart anyways where as they're not doing it just because they have to do 40 hours of community service in order to graduate it's already imbedded in them somehow. You know what I mean?"

The senior services director of a senior volunteer program (1301) describes their recruitment as both varied and targeted toward the senior population. When asked how the organization recruited he replied:

Everything and the kitchen sink. Every group we would go to, I'll tell ya we....my building, I recruited volunteers in my building. It not being a senior building, there's a lot of seniors in my building. There are a lot of seniors in these condo buildings. So you go to condo associations, if there's a bingo group, if

there's a dance group, anything having to do with the more active seniors. To be honest with you we wouldn't necessarily spend as much time in a nursing home setting for the folks who simply couldn't volunteer anymore.

Advertisement through pipelines is a more direct way of advertising through settings that guide specific types of volunteers to the organization. For example, an organization with a mission to tutor children may acquire volunteers through a relationship with an education department at a college with a community service or field requirement. Such a relationship increases the chances that students coming through this pipeline are both interested in education and would be retained for the duration of their requirement. When discussing the process of getting sports savvy volunteers the program director at a youth recreation agency (0401) says "I mean – obviously we need coaches. We're going to go to a baseball team and say, 'On the off season, can we swipe 4 of your coaches?' That's worked. That's worked really well. *University of Townsville and * Townsville Tech are like, yeah… this is great". The youth services director at a social service agency (1901) opts to seek out institutions that can funnel volunteers that need to fill a course requirement: "So recruitment we do it through different colleges and universities and high school. Like I have people that work with the field practicums or the interns."

### b. Vetting.

Once potential volunteers show an interest in the organization, the process of vetting begins. Vetting is a gatekeeping process wherein volunteers are examined before being allowed to fully participate. The importance of vetting was repeatedly stressed by a variety of agencies. The director of volunteer relations (1401) points out that "You can vet your clients, and you can vet your staff, it's a little bit more difficult to vet your volunteers so you better make sure you're

going through what you need to do to make sure you've got a proper placement with a volunteer."

The dimensions of vetting include the processes of application and assessment of fit. The application process includes any requirements that must be met in order for a potential volunteer to be considered for a volunteer opportunity; this includes background checks, interviews, references, filling out an application, or any other "hoops" that a potential volunteer must jump through before being considered a volunteer. A refugee resettlement agency (0701) asserts that if the application process requires a commitment from the potential volunteer then they may be more easily retained:

So there are a lot of different steps and they have to pay for their own background check too. So I feel like that process in and of itself weeds out a lot of people. They have to commit to even applying before you can commit to volunteering. And at first I think when we implemented that process, because we didn't used to background check all of the volunteers, we used to only background check the volunteers that were working directly with kids. We've since changed it so now it's everybody, no matter if you're filing papers you're getting background checked. And I think that has actually worked to our advantage and it just proves that we're serious, and if you're not willing to go through all four or five of those steps and submit a background check then its probably not the best opportunity for you, and you've invested even a little bit of money then it makes people a little bit less likely to bail.

A large social service agency (1401) values the application process not only because it helps with retention, but it subsequently enhances the client experience: "There's nothing worse, there's no feeling worse than if a client is counting on you to be a mentor or tutor and you don't show up. So that's why we make people jump through so many hoops, because if they're going to jump through the hoops 9 out of 10 times they're going to want to be here and they're going to want to do what they're doing."

Assessment of fit pertains to an organization's process of deciding whether someone is a good match for their setting. It is important that there is a good match between the volunteer and the opportunity, so fit for both the volunteer and the organization are involved in the vetting process. A social services organization (1901) points out the link between assessing volunteer fit and volunteer retention: "You know like you get a volunteer that's a really good fit for you and the program is a really good fit for them, then they more than likely will stay and will be happy doing the volunteer job. If you get somebody that's not really a good fit…it's like when you hire an employee, you know, it won't work out. So basically during the interview you kind of see and gauge." With this is mind, being able to figure out if a potential volunteer is a good fit during the selection process is crucial. A volunteer and an agency could be ill-fitting for a number of reasons: the volunteer is not going to get the experience desired, does not have enough skill to do the job, there are no job openings that the volunteer is excited about, etc. When asked to elaborate on the importance of the fit between the volunteer and the environment a volunteer services manager at a hospital (0801) explained: "If I think they have unrealistic expectations, or they may not be a good match for the hospital environment. We, a small group of us for some different reasons, toured a potential applicant last week. I think this environment scared her. I don't think it's right for her, and it's not right for everybody because for some people it's too

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hard to see sick kids. They can't handle that, they can't handle all the equipment, it's just not right. That sometimes comes out during an interview." All of these things must be considered in the volunteer selection process to ensure a good pool of volunteers, and increase the likelihood that people will stay.

## B. Volunteer Management

Although volunteer selection is an ongoing organizational process, it occurs only once in the life cycle of a volunteer. The processes of volunteer management and relationship building are ever present in the dynamic between volunteer and organization, with management existing in tandem with relationship building. The processes involved in managing volunteers relate directly to whether and how long volunteers choose to stay at an organization. Here, these codes include training and the overall structure of the volunteer experience. The director of a counseling organization (0301) recounted how she learned the importance of volunteer management from her mentor: "She really taught me that it's a management…you have to manage your volunteers. People think volunteers-oh they just come in, they're going to help. You have to think about what skills can they help you with, what they want to get out of it because obviously they're not getting paid, and do you have enough time to work with them. So then I really shifted it to, "what do I really need".

### a. Training.

The properties of volunteer management are training and organizational structure; the process of teaching volunteers what they need to know to successfully function at the organization, and the way the agency is organized. One hospital (0801) stated that "If you don't prepare them well to be successful in their roles, you're not going to retain them." The volunteer

and community relations manager of a homeless services agency (1501) seconded that statement by saying "I think the structure of the training really is the key kingpin of the volunteer program." Volunteers are much less likely to be retained if they are not given the skills to be successful and take full advantage of the volunteer opportunity. This includes specific skill building and/or overall development. Each of these training processes can happen either formally, in a structured/manualized way at an orientation or training session, or informally, from shadowing someone else or picking things up from working at the organization.

The dimensions surrounding training include a range of skill types necessary to "do well" at the organization and beyond: job specific, social/organizational, and general. Specific skills require teaching a volunteer how to effectively do their job. These are the technical elements of what it takes to be successful in a given volunteer position. A homeless services agency (1501) prides themselves on their thorough formalized training process, and emphasizes the importance of making sure that volunteers know exactly how to do their jobs: "Well, training would be the core training like for example that we do. Talking about giving them skills that they can use when their volunteering, not just saying this is what you are going to be doing but actually teaching them skills that they can actually apply to the volunteer experience." While some organizations find it best to have a more formalized training process to teach the skills necessary to do the volunteer job, others disagree. The volunteer coordinator of a senior center (0601) describes the nature of her organization as being better suited for very informal training: "Some people that I think really like that they didn't have to do this formal training first because it puts them off and they, they wouldn't come. And so they're happy you know that they can show up knowing that we're going to teach them on the job and they're the kind of people that are willing to do that." Although this organization does not have formalized training it is not for lack of

structure. They have chosen a process to fit their organization and the type of volunteer that they wish to retain. In lieu of having a formal training process, this volunteer coordinator describes the mentorship training model that they have:

> So when our volunteers are here not only do we set them up to succeed because I'm trying to do an orientation with them to say, this is more about who we are, but then here these are the people that you need to get to know. And so not only an orientation in the kitchen which is kind of a basic so they don't feel lost, but connecting them with people in the kitchen who are regulars and kind of putting them alongside people who are not new, so that they get to know them, they start chatting and they get to know the routine. So if it's something that they think they want to do on a regular basis they're already feeling like oh I know *Lauren or I know *Wanda and I could chat with her because I did this last time. Definitely connecting them with folks right away who are regulars, that mentoring process just kind of happens but we do that on purpose so that people can feel welcome right away.

Social/organizational skills are taught when imparting the values and social expectations that a volunteer must know in order to be successful at an organization. Although almost all organizations discussed this, the executive director of an art and education program (1001) spelled it out quite formally:

> So the orientation usually includes kind of an overview of the organization, the mission, the program areas, what I call our non-negotiables, so it's kind of like our organizational values and beliefs that we want everyone to adhere to including

the volunteers. We feel that volunteers, staff, everyone is when you're out in

public or even on the phone or interacting with somebody you're representing my

agency, so I want to make sure that we're all clear about what's acceptable and

not acceptable by us. So then it includes that, it includes an overview of what

they'll be doing and a conversation with whoever they'll be reporting to usually,

and they also have and overview of organizational policies and procedures...It's

usually a few hours, maybe 2, 2 to 3 hours.

Still, other organizations do not specifically teach their values but impart enough information

about the environment to give volunteers a feel for the norms of the agency. A counseling

organization (0301) suggests that as an office it is beneficial to "be up front about that, like what

the work is like what the environment is like, so everybody knows what's to be expected. You

know, I kind of go over all the office rules or what it's like to be here and this is what's expected.

I think that's helpful."

General skills are those that may not be directly related to the day to day job of a

volunteer, but contribute to a volunteer's overall development. These could be professional

development opportunities that one gets as an extension of their volunteer job, or

resources/services that a volunteer can take advantage of as a perk for volunteering. One housing

and community development agency (0101) offers similar professional development to its

volunteers as it does to staff.

For volunteers, and see the way it works, we have these professional development

tracks… for everybody here. Typically, we get those classes during staff meetings

once a month.  At least that's the way they're scheduled, sometimes there's other

things that carry priority. But, those sessions are always open to the volunteers. So

like, for example, everything that you might need to know to enforce equal

housing opportunity, or to rent a property, all the in's and out's of affordable

housing. We have courses that, if the volunteers tap into that free knowledge, I'm

pretty sure that we're enhancing somewhat the way they think or…their

knowledge for sure.

An emergency services organization (2001) with inconsistently scheduled opportunities

offers professional development as a way to both train and engage their volunteers between jobs.

The volunteer resources manager describes professional development programming at the

agency as "A lot of it has been time management, resume building and professional development

that way, having someone who is high on a level like our CEO give a *workshop and talk about

keys to success, we had somebody come in and talk about how do you build your personal brand.

So based on our resources and then seeing what people want we're building those development

opportunities." These development opportunities represent strategies to "keep them present with

us."

Along with the benefit of professional development there are other things that an agency

may offer to their volunteers. A senior volunteer program (1301) offers resources to their

volunteers that they may have trouble getting otherwise:

That's what I was talking about before where we talk about policy issues, health

issues, doctors nurses coming in, really they varied depending on what was going

on. And again sometimes a big community need would come up, you know

*Townsville. You know, suddenly the basements are flooding like crazy so we'd

get a group together about that, what to do. We'd get some legal folks to come in

and give us suggestions. And like the scam artists, we did a lot with that, because

that was increasingly becoming a problem, you know.

A senior center (0601), to compensate for no budget to provide consistent resources for

volunteers, looks for opportunities to be able to give their volunteers perks: "If we have donated

food, we're able to provide that to our volunteers as well: 'take this home, you can have an extra

meal.' And so those, they're sort of tangible but they're sort of intangible in terms of if we can

help with hunger needs or some other sort of support with social services, we'll do what we can,

especially for our volunteers."

### b. Organizational structure.

Along with training, the way that a setting is structured affects volunteer management.

Organizational structure dictates the roles that staff and volunteers take, and how volunteers and

staff can relate in terms of management. Volunteers who know what their job is, know who to

report to, and have a clear place in the organizational structure are more likely to have the tools

to be successful in the organizational environment and be more likely to stay. The dimensions of

volunteer roles includes the definition of their role, and how much choice they have in their role.

The choice of role includes the range of opportunities available, and a volunteer's autonomy in

selecting one.

Some organizations assert that having a formal job description for volunteers is vital to

their success and ultimate retention. The volunteer coordinator of a hospital (1601) said that "We

are very well structured and each volunteer here has a position description, and it's a position

description that pretty much looks like a job description. They know what the qualifications are,

they know what their duties are, they know what the limitations are, they are assigned to a certain department where they have to come, they have a supervisor, they know what their expectations are." While this organization is very precise about the definition of each volunteer's role, other agencies describe the role of volunteers in broader terms. One social service agency (1401) asserts that a volunteer "takes so much pressure off of me, and that's the key for a volunteer. You're really just trying to free up time for the staff so they can best utilize their talents to be able to take care of the client need."

Providing a volunteer with both a range of roles and some autonomy in choosing one of interest is one way that agencies attempt to keep their volunteers coming back. The volunteer coordinator of a long term shelter (0501) illustrates that having a range of opportunities to choose from engages and ultimately retains volunteers.

> People want to be a part of something that is not ordinary. And if it isn't ordinary,
> there's something in it that's uniquely interesting to them. So I try to tap into that
> by giving them all the information that we possibly can give you so you can pick
> out something that is uniquely interesting to you. The whole place could be
> interesting to you, or being a facilitator might me uniquely interesting to you, or
> bringing in a whole group of folks together to do a *group grub event might be
> uniquely interesting to you and your friends who might have a birthday and you
> want to come here and celebrate it. Whatever works.

Having a variety of roles is just as important as the right role being filled by the right volunteer. At one refugee resettlement agency (0701) role matching is

Based on what the volunteer says they want to do. Now occasionally we do kind

of guide volunteers, particularly if it's a high school student or a really young

college student and they say I want to be an adult mentor. You know you're

eighteen, we're not going to match you up with some forty year old, we always

kind of want to tread the line between what would be comfortable for both of you

and what would be beneficial. So normally we tend to try to push the younger

kids, if you want to do in home that's great but do youth tutoring, or do after

school, or do the employment program where you can come and tutor someone

one on one but on site. So I'll make suggestions but if they're really adamant

then…generally after going through the orientation volunteers are fairly well able

to self select and self place where they would fit best.

When there is a poor match made between the volunteer and the role, and no variety in the roles

available, a volunteer can have no better job-fit and be lost to that agency. A volunteer services

manager at a hospital (0801) shared this sentiment regarding a volunteer who is not working out

in her current role: "Because we're small and because we have a really limited number of

different volunteer opportunities, often if you're not working out in a role I have nothing else to

offer you. This volunteer right now is not working out on the nursing unit but she wants to work

with the kids. I can't give her to *nursery services, she's not going to work any better. The

problems that exist in nursing I can't shove off onto *nursery services, that would just destroy

my credibility with *nursery services and I'm not sure what I'm going to do about this."

The dimension of staff roles includes definition (i.e. is it someone's job to manage

volunteers? Does everyone pitch in? Do staff have defined supervisory or managerial roles as

described in the organization's structure?), and volunteer staff relations (i.e. how do staff and

volunteers relate to one another within the confines of the structure of the organization?).

Managing volunteers is not only an integral part of mobilizing an unpaid workforce toward

achieving an organization's mission, but a crucial component in setting up volunteers to be

successful and consequently stay at the organization.

Organizations with staff dedicated only to volunteers (i.e. a volunteer coordinator)

describe their roles as making sure that volunteers are productive and happy. These coordinators

say things like (0501) "I'm there to make sure that everyone is having a good time and

everything gets done", (0601) "I have to balance out the amount of people that I have, the

number of volunteers that I have on any given day to do the job so that my regulars feel good and

my new people feel good… As a volunteer coordinator, that's kind of key to keeping folks, is

helping them fit into a situation that they feel needed, their talents are being used, they're

appreciated in some way", and (0801) "I do know each of the volunteers by name and I know

something personal about them, that's really important to me. My bosses over the years have

been amazed at how do you keep knowing all these people? That's my job, and they have a right

to expect that from me."

Agencies with and without personnel specifically hired to manage volunteers may share

responsibility of volunteer management with multiple staff members. The associate director of

development and external relations (0201) described how the definition of staff roles changed as

a result of losing the agency's volunteer coordinator.

> We've all learned since we got rid of the volunteer coordinator…a lot of the
>
> responsibility went from being pretty much lumped onto one position to being
>
> spread out and dispersed amongst the whole agency. So I would say the process at

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this point is very informal. Most of the volunteer coordination responsibilities fall

outside of most of our job descriptions. In terms of whether that makes us more or

less successful, I think it makes us less successful at it.

A special projects manager (0101) has always shared responsibility of volunteer management

with other staff: "I handle volunteers, but I'm not the only person here who works with

volunteers." Some agencies go as far as to see volunteer management as a part of every staff

member's job description. An executive director (1001) explained that "every volunteer reports

to somebody on staff that's a paid staff person. So the volunteer coordinator is really the

facilitator for all of those processes", while a senior services director (1301) agrees by saying

"we had no choice. I mean I basically was like, you know, I said to all my staff I don't care what

your job title is, you're a volunteer recruiter and you're a volunteer retainer."

How volunteers and staff relate to one another within the structure of the organization is

another way that agencies think/ strategize about retention. Here the focal question is whether to

treat volunteers as employees, and the organizations sampled fall nearly equally into either

school of thought. A tutoring center (0901) makes a distinction between relating to volunteers

and relating to staff: "I also think that in organizations that use volunteers you're not

their…you're their supervisor you're not their boss. You're not paying them, so be friends with

them. The happier they are to come and feel like they've got someone that they get along with

that they want to spend time with, the more likely they are to stay." At an educational support

agency (1201) they are also more lenient on volunteers than they would be on employees.

So if one day one of the mentors come and comes in late or is not in a really good

mood or something is not like "ughghg", you know, it's not 100%...he didn't

perform 100%, well that's fine. So I tell my- I make sure that my team and myself, we always remind ourselves that they're human and they're not getting paid to do this. So they…you have to understand that sometimes they may not be 100% and that's fine, you cannot write them off because they're not working for you. So the customer piece is about trying to meet them where they are and understand that they, actually, they're going that extra mile to do this. So they should, you know, we should be a little bit more understanding. It's not about that the customer is always right or the mentor is always right, no, it's just that if something happens just to have the context that they have their work they have their lives and they come here.

Other organizations see treating volunteers as they would a staff member as a way of equalizing the roles and diminishing the gap between paid and unpaid personnel. At a Latina empowerment agency the program director (1101) describe volunteers as "a part of the agency, they're treated as a staff, we eat together, we work together in events." At a social services agency (1901) this equality between staff and volunteer even extends to disciplinary action: "So let's say it's a volunteer continuously changes schedule, comes in late, doesn't tell us anything in advance, I will hear from my staff about this first and foremost. So it would treated like as a staff person that's not working out so we will have a talk, we will have a formal log to put that in writing, they will have a chance to tell us what's going on, we can come up with a plan of improvement and give a set time and then we'll reconvene."

Despite any strategizing by the organization there is an inherent distinction between paid and unpaid personnel. With everyone working side by side and some being paid while others are

not, how they relate to one another could cause tension. A volunteer resources manager (2001) discusses the sometimes strained relationship between volunteers and employees:

> I can honestly say that I have experienced some underlying tension. People come to me, I have like a chair by my cubicle, and people just will come and sit and vent and talk to me. And yes there have sometimes been tensions, mostly with paid staff members who feel like I'm concerned because….we ask them to find a volunteer counterpart, someone who can do their job to support and help them to be able to do more things and that sometimes makes people uncomfortable. Because it's like ok if you can have somebody to do my job for free what do you need me for you know? And it's like just kind of explaining that they're there to supplement and help you, they know that they're a volunteer, they're not there to take your job but the conversation has been had on several occasions. And then there's been the reverse where the volunteer will say well, you know, I'm doing all her work and she's getting paid I don't understand. So then that has to be visited to say you shouldn't be doing all her work, you should be supplementing, you should be supporting.

## C. Relationship Building

Relationship building frequently consists of strategies related to retention, and is discussed as a key component of retention. Relationship building is largely done **for** volunteers, with the direct intention of increasing continued service. The volunteer resources manager of an emergency service organization (2001) said "I've been with this chapter for about 4 years, and I've seen the more hands on we are with them the better the relationship is. So a lot of retention

just is the relationship building, and just kind of keeping that relationship".  The volunteer coordinator at a large hospital (1601) also asserts the importance of relationship building and puts the responsibility for that process on the organization's staff when saying that "the glue and what keeps all these pieces together is the relationships. You have to have people who are invested, who are passionate about working with volunteers, you have to have individuals who know how to nurture relationships with others because if you don't have strong relationships there's no way that volunteers are going to stay." The properties of relationship building include integration, appreciation, and sense of community; how volunteers are enveloped into the organization, making volunteers feel valued/appreciated, and belongingness or connection to the organization.

### a. Integration.

Although some distinction between who is and is not a paid staff member is necessary, this distinction can be starker than needed to successfully manage volunteers.  The director of a youth development agency (1801) found it important to treat both staff and volunteers as equal members of the organizational team: "The dimensions surrounding integration includes breaking down any unnecessary "us" and "them" barriers between staff and volunteers, and can be categorized as either social or professional. Social integration includes inviting volunteers to staff lunches, outings, activities, and otherwise integrating them into the social fabric of the organization. The executive director of an art and education program (1001) found it important to socially integrated volunteers into his organization in a number of ways:

> Don't have volunteers feel like they're second class citizens, sometimes in
>
> organizations volunteers don't feel like they're a part of the team, they feel like

they're just coming in to do this nominal task. Even for our staff outing we

brought a number of volunteers with us, which was more expensive but we have

staff outings all the time. We have probably 2 or 3 times a year and we bring

anybody who's volunteering with us, and it's an opportunity for people to coexist,

relate to one another outside of the work space. We have a book club, so they're

reading a book that somebody recommended, I don't even know, and the

volunteers sit in on the book club and it's a staff book club. So those are some of

the things we do.

Professional integration happens by not creating unnecessary division in the work of the

organization. This can happen by inviting volunteers to staff or board meetings, giving them

access to staff trainings and resources, and keeping them informed about the state of the

organization (i.e. funding, personnel, evaluations, etc.). A senior services director (1301) said:

"Include them wherever possible. Obviously you're going to have some all staff meetings at

times, and obviously some meetings are confidential where volunteers wouldn't be there but, you

know, if you're having a teacher assistance conference about how the kid's doing include the

volunteer. So as much as possible we want to integrate them." A youth center director (1901)

echoed that belief in volunteer integration by sharing that "they are always involved in our staff

meetings and when we have professional development they're always included as well. So for all

intents and purposes, except for the fact that we don't pay them, they are like staff." She goes on

to express her commitment to this integration saying, "we used to have our staff meetings at the

same day at the same time, but we figured that that doesn't work very well for the volunteers

because they have different schedules. So now we try this rotating thing so at least everybody

gets to participate every now and then in the staff meetings even if they cannot participate in all of them."

## b. **Appreciation**.

Appreciation was brought up most often by organizations as absolutely essential to retention. The volunteer services manager of a hospital (0801) discussed how "recognition and retention usually are talked about as a term, they just go together and if either piece is missing its not going to work well." A director of volunteer relations (1401) agrees when saying "You have to make sure the volunteer gets that certain pat on the back, it they're not getting that then that's another thing you don't see in terms of the retention. They do so much for us, you have to be able to go back and recognize their talents and what they're bringing to the table for you. It's huge." Appreciation can be formal or informal and range from a verbal thank you to plaque or a luncheon. The volunteer coordinator at a senior center (0601) acknowledges the diversity among volunteers when she explains that "It kind of depends on the people. I find that some people notes aren't their love language or whatever and they appreciate a hug while other people really want a note, a plaque, a something that says, 'Look what I've done.' Everybody's been different, who's kind of come through here. So I try to meet them in different ways." The executive director of a small counseling agency (0301) decided that she would recognize volunteers by "Just telling them, emailing them. I emailed the volunteer of the silent auction the other day, like just wanted to let you know you're doing a great job because she really is impressive." The associate director development & external relations at a homeless services agency (0201) recognizes their volunteer more formally: "We have an award every year that recognizes volunteers, and in the e-newsletter we have a monthly article that recognizes a volunteer who's

done something interesting. And there's always a competition to figure out who would be the best candidate for it because we have a lot."

### c. Sense of community.

In this study sense of community is understood as described by Sarason (1974): perceived belongingness, interdependence, and mutual commitment. With that in mind, the dimensions surrounding this property include membership (volunteers feeling like they are a part of the organization), support (volunteers feel they can get help from the staff), and influence (volunteers feel that they have an impact on the organization).

### i. *Membership.*

Promoting a feeling of membership in the organization can be a direct or an indirect retention strategy, and be operationalized in a number of ways. The two most common ways that participants described volunteer membership in the organization is ownership and commitment. The director of a youth development agency (1801) attributes the feeling of membership amongst his volunteers to the team oriented environment of the organization; "I think it's just the overall group, team concept is what helps people to feel that. I think it's, you know, if you're relating to people and like say you have a meeting and people are part of contributing to that they feel more like oh this is my organization too. Again, maybe at the beginning it was like I'm here to help you guys do this, but then there comes a point where I'm helping us to achieve this you know." When starting a new mentoring program with a lengthy time commitment the director of youth services at an educational support agency (1201) asked himself:

> how am I going to retain these people, what needs to happen? And I guess that's
> when we did the things that we were supposed to do for retention, which is, you

know, building that strong relationship and making them connect with us, with the

program. They take ownership, that's so important when they take ownership.

They don't feel like they just like, they think that they come and they leave. They

are * future visions and I know they feel like that. They're part of the system. So I

would say it's a pretty good retention that we have, and people are very happy.

Similarly, many organizations discussed increased commitment as a byproduct of their

environment and an indication of volunteer membership. The special projects manager of a

housing and community development agency (0101) said that "we've had volunteers that have

been committed to the *Community Rising Program for many years, even some from inception.

They're community members, dedicated, they have leadership skills, they want to – they are in

tune with our agenda, our mission, and they have never ceased to help." At a homeless services

agency (0201) volunteer membership was discussed in terms of longevity and amount of

commitment; "we have the ongoing volunteers who have been here for a long time, many of

them are people who started volunteering here and now are board members that do a Monday

shift for the meals program for the last 10 years."

## ii. Support.

The volunteer and organizational relationship is one of interdependence. As much as

organizations rely on volunteers, volunteers also rely upon the organizations to support their

volunteer role. Organizations operationalize the dimension of support in many ways, with most

organizations supporting their volunteers by making it easy for them to get what they need to be

successful in their role. Support can be both proactive and reactive; reaching out to volunteers,

and being available for them if they need extra help. A refugee resettlement agency's volunteer

coordinator is proactive in seeking out consistent ways to support volunteers (0701): "So part of my role as the volunteer coordinator is, at least with the in-home mentors, I do thirty, sixty, and ninety day check-ins, they all get mentorship binders that have resources, ESL activities, employment activities that sort of thing. They also all get volunteer newsletters which have links to different resources, and then they'll have me and a program manager from whatever program they're involved in both acting as point people so that they can go to them if they need anything." A volunteer services manager (0801) finds it necessary to be reactive in helping volunteers having trouble coping with a hospital environment: "But in terms of you know if they've met a child who's really challenging or who really touched them, I've had a couple of things in the last year where people were having a hard time emotionally dealing with some of what they see here. You have to be able to talk people through that. So I think that the volunteers know that there are people here that they can turn to."

### iii. Influence.

The dimension of influence includes volunteers being important to the organization and having an impact. An executive director (0301) asserts that "I think nothing's worse than coming in and kinda twiddling your thumbs or feeling like what you did didn't matter, that you sort of pushed paper around and you didn't really contribute." This director makes sure that volunteers understand how influential they are to the organization by giving them opportunities to see the impact of their work:

> like the volunteer that's working on the auction, when I got the mail this week
> there was a stack of letters from people who had donated. She had sent out a big
> stack of letters, so I let her open them rather than me because she's doing the

work. So I think that makes people feel connected. Like if you're sitting there

sending out 200 letters it's exciting when they come back and somebody's

donated. So I try to do things like that where I kinda…where they really feel the

impact of their work.

How much influence that volunteers can have in an organization is as diverse as the

organizations themselves. At an emergency services agency (2001) volunteers can be more

influential than staff members, and hold powerful leadership positions that allow for far reaching

organizational impact:

So we definitely encourage volunteer leadership, and we see it in the person.

There's a guy who's only been a volunteer for a year and he's already a regional

volunteer lead, because he just came in the door knowing that he wanted to help

the *Emergency Network and he had all the skills. Another volunteer, he's the

one who built our disaster services new volunteer orientation. So seeing as a

volunteer the things that maybe we were lacking, or the things that could be a

little more robust, and then going in and building that is awesome and giving

them that opportunity. I think that's one thing with the *Emergency Network that

we do is we say hey volunteers run the show and paid staff members, we are at

your mercy.

 Although there are no formal leadership opportunities for volunteers at this small youth

recreation agency, the program director still allows volunteers to have a profound impact on the

organization (0401):

We're using engagement and empowerment for our kids but… we've got such a small grassroots program that volunteers come in and they have their ideas and we honor their ideas. We bring everything to the table – these guys aren't just unpaid workers who come in once a week and volunteer for us. They're an integral part of the program. As they have backgrounds in coaching baseball, playing baseball, whatever it is working with at risk youth… they're bringing their ideas to the table and we're honoring them and we're like, 'Alright, come here let's talk. I really want to talk to you, find out like… how did you get that to work, how can we implement that on a consistent basis' So really bringing the volunteers' perspectives into play and making them feel like…well not just making them feel, but that they are absolutely the glue that holds us together.

## IX.    Conclusion

The import of adding the organizational perspective to the volunteerism literature is summed up by Tebes' (2005) thoughts on perspectivism: "Perspectivism begins with the assumption that although there is a mind independent reality, knowledge about that reality is "situated" or contextual" (pg. 220). Organizations are the context in which volunteer retention is embedded, and understanding how this context thinks and acts around retention is a vital perspective in understanding the retention phenomenon. Participants said that their agencies create an experience that makes volunteers more likely to stay. This occurs alongside the creation of the client and staff experiences. Retention, therefore, happens within a system of organizational experiences. Organizations create the volunteer experience by thinking and strategizing around volunteer selection, management, and relationship building.

This study contributes a different level of analysis to the volunteer retention literature. While most volunteerism research focuses on the individual, this study elevates the level of analysis to the organization (Bronfenbrenner, 1977). Looking at a different level of analysis provides a picture of retention in context that is not visible from the individual level. Not only does environment matter for retention, but the environment approaches retention differently than is described by the individual level theories discussed earlier.

Organizations view volunteer retention as a product of creating the volunteer experience. Agencies serve clients, meet staff's needs, and retain volunteers; and all of these processes are interdependent. The ecology of volunteerism cannot be understood separately from the staff and client needs of an agency. This dynamic view of volunteers as they exist in the organizational ecosystem is necessary in understanding retention in context. When researching volunteer retention, the question of what makes a volunteer stay at a particular place differs from the

reality of how organizations think and act on the topic. Ignoring how retention fits into the

organizational system limits both the understanding of the phenomenon and ways to study it

The literature used to construct the interview included both individual and organizational

theories, such as role identity and social climate. Each of these theories added to the idea of

creating the volunteer experience, but none alone captured it. For example, role identity theorists

believe that volunteers who internalize their volunteer role (i.e. see it as a part of their self-

concept) will volunteer longer. No organization endorsed this theory explicitly; however

volunteers were encouraged to see the broader import of their role: how/why the clients and staff

need them. The functionalist approach relates continued service to the use that volunteering has

in people's lives. Organizations acknowledged this as important enough to influence direct

strategies around selection and relationship building, however they were clear that this existed in

balance with the mission and resources of the organization. There were also things that agencies

could or would not do to be useful to volunteers because of how it might affect the

organizational environment. An agency would not prioritize volunteer autonomy in choosing a

role to the detriment of creating the staff experience (i.e. staff training, resources, etc.).

What studies have called organizational integration was endorsed by nonprofits. A

volunteer's level of integration into a setting influences retention, but what the literature broadly

called integration was separated into categories by agencies. The definition of integration was

much more precise in organizations than in the literature. Organizations cited integrative

practices such as including volunteers in staff meetings, inclusive communication loops, and

informal networks. Organizational structure was also salient to these participants, and often

attributed to constraints on resources. Agencies agreed that having a clear normative way of

doing things, be it formal or informal, was important. However, whether an organization had

structural features like formal mentoring, a staff person dedicated solely to volunteers, or well-defined job descriptions was a product of both need and resources. Some organizations thought their operation was best without a volunteer coordinator, while others disagreed but could not fund the position. The social climate framework posits that the "personality" of a place (Wandersman & Florin, 2000) is related to retention. Nonprofits agreed that personality mattered, and this was mostly reflected in indirect retention strategies. When describing social climate many organizations said things like "that is just the way we are", or described informal interactions like smiling at each other in the hallways, rather than strategies aimed at creating a positive social climate.

What previous theories note as important to individual volunteers often differed from what organizations actually do to keep them. These frameworks all add something to the understanding of retention, but do not tell the whole story. The retention phenomenon is thus not simply an aggregation of the factors described by the literature, but the creation of an experience that must fit into the organization as a system. The individual level of analysis has a limited range of relevance in this data, thus the importance of describing retention ecologically on the larger organizational level.

Using the organization as the level of analysis not only sheds a different light on the literature, but illuminates new important variables. Volunteer selection factors like recruitment and vetting were not visible from the literature on the volunteer's perspective. The organizational perspective also revealed the importance of different types of trainings and how staff fit into the organizational structure. This study provides a description of how the principles in the literature are lived in context. For example, organizations did not subscribe to role identity theory as defined in the literature. The idea of a volunteer identity connecting with retention was not

important to them, nor was the idea of internalizing their role as volunteers at a specific place. Agencies did, however, think it important for the organizational mission to be important to volunteers. This was largely accomplished through training and recognition, as opposed to integration into the environment. A volunteer's perspective on role identity differs, then, from the organizational perspective.

These findings describe how organizations think and strategize about retention, not a step by step process that they follow to achieve it. The creation of the volunteer experience, although common amongst participants, is unique to the needs and resources of the organization. The mission of one organization may require intensive multiday training while another may not, still another may have the resources to send volunteers to conferences while a short staffed office may struggle with finding personnel to serve as mentors. Ecologies differ, and there is no single linear protocol that organizations follow to create the volunteer experience. Organizational practices reflect agency needs and the resources available to meet them.

## X.      Future Directions

Studying volunteer retention from the organizational vantage point allows for a broad range of contextual and system level research questions that go beyond the individual level of analysis. To create an environment that balances multiple experiences (i.e. volunteer, client, and staff) is no small task. As illustrated above there are many elements that go into creating this environment, and they contain intended and unintended consequences. It is difficult yet important to untangle the effects of direct and indirect retention strategies. How do the organizational practices aimed directly at benefiting the clients and staff indirectly retain volunteers, even in the absence of direct retention strategies? What ripple effects occur in the organization when changes are made to strategies aimed at clients or staff? It could be that direct strategies for volunteer retention, such as recognition, are necessary but not sufficient to create the volunteer experience.

The ecological principle of interdependence encourages looking at the ripple effects within this system. Within a nonprofit environment there are multiple experiences being created, and direct strategies for one group yield both intended and unintended outcomes for another. For example, training volunteers not only supports retention by setting up volunteers to be successful in their roles, but supports the client experience by increasing  the chances that they will be adequately served, and supports staff by producing knowledgeable volunteers. Given that retention and the volunteer experience exist in a system, what happens when there is a new training program?

Organizations are ever changing, and none believed that the creation of their volunteers' experiences guaranteed retention--things come up, funding changes, and volunteers have outside priorities. If researchers do not understand the phenomenon of retention as it fits into the

volunteer experience, and how that experience occurs in relation to the organization as a system, they will be limited in the research questions they can ask. Further research on volunteerism has the potential to include a more contextual lens and use a higher level of analysis. Understanding the context surrounding retention gets closer to the lived experience of both volunteers and volunteer dependent agencies.

Although theory generation was not the goal of this study, the results prompt questions of how organizations systematically differ. With the descriptive categories gained from these interviews I can theorize about the relationships between these descriptions and organizational characteristics. The interviews were rich, and participants shared information that was not discussed here. With a slightly different coding scheme that included access to resources as a sub-code, and the addition of a few interview questions, this data can be used to theorize about the relationships between organizational perspectives on retention and ecological characteristics. When coding I would look for how the mission, size, longevity, and staff roles of an organization reflected on their volunteer selection, management, and relationship building choices. For example, organizations with volunteer coordinators may have more resources to offer volunteers, and fund more formal retention initiatives. The size, mission, and longevity of an organization may also bear on whether a nonprofit has a volunteer coordinator. The interaction between characteristics would also be explored. To do this would require more information on the ecologies of these nonprofits. For example, the interview used here did not ask about the range of external resources and partnerships available to organizations. With the addition of a few questions and an expanded coding scheme a theory of how ecologies on volunteerism systematically differ is possible.

## XI.    Limitations

This study is limited by its sampling method. The first few participants were recruited exclusively using online resources. This strategy found only organizations that had websites or advertised on volunteer search engines. It may be that these types of organizations are qualitatively different than those that do not, or cannot, use the internet to recruit volunteers. For example, a nonprofit that serves a specific need in a narrow locale may not require an online presence. Getting all their resources and personnel from within the community leaves them with no desire to venture online. A place with this profile may approach creating the volunteer experience differently than other participants. Such an organization could meet this study's inclusion criteria but be less likely to be included because of the sampling method.

This error was discovered early and other recruitment methods were added to the sampling strategy (i.e. snowballing and using personal and professional networks/affiliations). The final sample was obtained using a diverse sampling method, however, the initial participants were recruited using only online means. Nonprofits that recruit online were more likely to be included and are overrepresented here. This theory may, therefore, be more applicable to organizations with an online presence.

The screening method used was also a limitation. Only organizations that were seeking volunteers or accepting volunteer inquiries were recruited. An agency did not have to be actively trying to fill a position, but must have been open to receiving volunteer inquiries. It was assumed that nonprofits that did not mention volunteers, either by word of mouth or public relations material, did not use volunteers on an ongoing basis. This screening method ensured that those contacted had a continuing use for volunteers, but it is possible that places were systematically

screened out that would have met all other criteria. Overall, this study adds to the understanding

of how volunteer dependent organizations think and strategize about retention.

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## Appendix A

**Interview Questions**

Many organizations rely heavily on volunteers. They can do anything from small tasks to carrying out a core mission. To these organizations, keeping their volunteer work force is a constant process. Every organization operates differently, and has different beliefs about how to keep volunteers. Organizations also function in an unpredictable world, and are presented with barriers to carrying out their philosophies. I am interested in how organizations think about retaining volunteers over time, and the strategies they use to do so. During this interview I will be asking questions about how your organization retains volunteers, what ideas you have about retention, and any overarching beliefs you hold about the process of keeping your volunteers. I'm interested in how things really work, so everything that we will talk about today is meant to provide a better understanding of the process of volunteer retention and the role that organizations play in it.

Note: When I refer to volunteer retention, or simply retention, I am referring to the process of keeping volunteers at your organization. I will be using these terms interchangeably throughout the interview. When I refer to your organization I am referring to the organization as a whole. When I refer to your program I am referring to the _____ program specifically (the program that you are recruiting volunteers for).

1) Can you describe your organization?

    a. What is the mission? Do you have a formal mission statement?

    b. How many volunteers do you have?

    c. How many people on staff?

    d. How big is your organization? Local? National? International?

e. How many people do you serve here? Community? City? State?

2) Can you describe the overall process of retention regarding volunteers; from recruitment to long term retention?

    a. Is it important that you keep the volunteers that you have, rather than keeping a certain number of volunteers? Why?

    b. What kinds of volunteers do you look for?

    c. Does this influence your recruitment? How?

    d. What roles do volunteers play in achieving the mission of your organization?

3) Can you remember a time when retention was very easy? Difficult?

4) Do you have any advice to give other organizations about how to get and keep their volunteers? What to be sure to do? What to avoid?

5) As a result of your experiences, do you have your own theory about how to retain volunteers?

**Probes.**

**Organizational structure.**

1. Who's in charge of volunteering (who orchestrates the volunteer process)? Job title? What do they actually do?

2. Do you have a training process for volunteers? What specifically is involved (can you walk me through what a new volunteer would go through; what a veteran volunteer would go through)? Barriers?

3. Are there opportunities for advancement? How does someone "move up"? Barriers?

4. Overall, Are your policies clearly defined? Are there documents on how things are supposed to run? The structure of the organization? Is there an understanding of the

program's plan and the process of achieving it? Is this formally taught/ available to people? Are any of these specific to volunteers?

5. What kinds of tasks do volunteers carry out? How do they relate to the mission?

6. Are volunteer tasks clearly defined? Do people know what they are supposed to be doing? Do people have a thorough grasp of what their job is? How their job fits into the mission of the organization?

7. Overall, how formalized are your organizational practices? Is the way that the organization operates formally laid out? (what things are formal, what things are informal)? How closely are the formalized things followed?

   a. by formal I mean how firm are these practices (vs. malleable). Are organizational practices put in writing? Are they taught in trainings?

8. Do you think that the structure of your organization is related to volunteer retention? How so?

9. What happens when there are volunteers that you do not want to retain?

   **Social climate**

- First I will define social climate as the "personality of the organization". It's the answer to the question: "what is it like to work there?"

10. How would you describe what your organization is like to work in?

   a. Probe if they do not touch on these things: What is it like to work there in terms of the quality of interpersonal relationships? How does your organization promote personal development or growth? How does your organization respond to change?

11. Do you think that the social climate of the organization is related to retention? How so?

**12.** Overall, does your organization have any policies/ practices in place aimed at creating a specific social climate? If so, what are they?

**Organizational integration**

**13.** Describe the social networks at your organization. (i.e. the relationships and connections that people establish within or through the organization).

**14.** Are there networks shared among everyone in the organization? Are there networks among volunteers specifically?

**15.** Are there any practices/ strategies in place to support networking/ make networking happen? What are they? Events? Settings? Physical Space? The structure of the volunteer experience?

**16.** Are there any practices/strategies in place to provide support to volunteers (formal or informal)?

    **a.** How are volunteers supported?

    **b.** Are there any social resources for support?

**17.** Do you take any steps to make volunteers feel supported or valued by the organization? What are they?

**Function of volunteering**

**18.** What do you think volunteers at your organization stand to gain by volunteering at your organization?

**19.** Can you recall any conversations or interactions with volunteers about what volunteering did for them?

**20.** Are there formal practices in place to help volunteers benefit from volunteering? Barriers to carrying out these practices?

**Volunteering as an identity**

**21.** What qualities do you consider important in a volunteer?

**22.** How important is it to your organization that your volunteers see volunteering as a part of who they are?

    **a.** Probe if they are confused: This question is in regard to volunteers seeing themselves as volunteers, and seeing volunteering as a part of who they are; this is not specific to volunteers seeing themselves as a part of your organization. For example, I can see volunteering as a part of who I am, but not see volunteering at any one place as a part of who I am.

**23.** Do you use any strategies to make volunteers see volunteering as a part of who they are? What are these strategies? (i.e. do you teach volunteers to be proud of what they are doing, exalt them for being volunteers, do you try to incorporate values associated with volunteering into their lives etc.)

**24.** How important is it that your volunteers see the mission of the organization as a part of their own core mission. Probe if they are confused: This question is in regards to volunteers seeing the goal of your organization, and perhaps the organization itself, as one of their personal goals (i.e. mentoring, keeping the environment clean, etc.).

**25.** If so, how do you support that (or instill that) in your volunteers? (Do you stress volunteer pride in the organization and/or its mission, do you teach organization specific values, do you have strategies to turn organization specific values into the values of volunteers, etc.?)

**Appendix B**

1. **Volunteer Selection-** This metacode refers to the processes involved in organizations selecting which volunteers will actually work with them and ultimately be retained, including but not limited to advertising, how volunteers are recruited, and how applicants become volunteers. Volunteer retention begins with selection.

1.1 Recruitment – The process of letting people know about the organization, the opportunities available, and getting them interested.

    1.1.1    Inadvertent: happens as a result of normal organizational operations

        1.1.1.1 Reputation

        1.1.1.2 Snowballing

    1.1.2    Direct Strategy

        1.1.2.1 Advertisement: find volunteers that will stay, are interested, have certain skills, etc.

            1.1.2.1.1   Pipelines (volunteers are funneled to the organization through another instutition)

            1.1.2.1.2   Settings  (organizations are purposeful about where they recruit)

            1.1.2.1.3   Networking

1.2 Vetting- A gatekeeping process wherein volunteers are examined before being allowed to fully participate

    1.2.1    Application: the requirements that must be met in order to be considered for an opportunity

    1.2.2    Assessment of fit: deciding whether someone should be allowed to volunteer in that setting

1.2.2.1 Fit for volunteer (example: not interesting, not getting the experience desired)

1.2.2.2 Fit for organization  (example: no job openings, not enough skill)

2. **Volunteer Management –** This metacode refers to the idea that volunteers have to be managed. The processes involved in managing volunteers relate directly to whether and how long volunteers choose to stay at an organization; these processes include training and the overall structure of the volunteer experience.

2.1 Training- the process of teaching volunteers what they need to know to function successfully within, and sometimes outside of, the organization .

   2.1.1    Skills – what skills does the organization teach the volunteer, and how do they do this

      2.1.1.1 General Skills- these are skills that may not be directly related to the day to day job of a volunteer, and attribute to a volunteer's overall development

         2.1.1.1.1   Professional (example: professional development, class or conference not specifically related to volunteer job)

         2.1.1.1.1.1 Formal

         2.1.1.1.1.2 Informal

         2.1.1.1.2 Resources/Services (example: a class that may be open for clients that is offered free to volunteers)

      2.1.1.2 Specific Skills

2.1.1.2.1    Job specific ( example: teaching someone how to effectively do their job)

2.1.1.2.1.1 Formal (example: being taught step by step what to do in a structured and/ or manualized way)

2.1.1.2.1.2 Informal (example: shadowing someone and picking up skills from them)

2.1.1.2.2 Social/ organizational (example: teaching someone how to successfully function at that specific organization)

2.1.1.2.2.1 Formal (example: values and social expectations necessary to be successful at the organization are taught at orientation)

2.1.1.2.2.2 Informal: ( example: values and social expectations necessary to be successful at the organization are picked up through working at the organization)

2.2 Structure – the way that the organization is organized

2.2.1    Volunteer Roles (example: job description, job type, etc)

2.2.1.1 Definition

2.2.1.2 Choice of role

2.2.1.3    Range (example: what kinds of opportunities are available to volunteers)

2.2.1.4    Autonomy (example: volunteers can decide where they want to work)

2.2.2  Staff Roles (example: volunteer coordinator, supervisor)

2.2.2.1    Definition

2.2.2.2    Volunteer staff relations

3. **Relationship Building** – This metacode refers to the importance of the relationship between the organization and the volunteer as a bond that facilitates retention. Organizational processes aimed at building a relationship with volunteers include integrating volunteers into the organization, and appreciating their volunteers. Integrating a volunteer into the organization may make them feel like part of the team, valuable, a sense of community, and a sense of responsibility to that community.

3.1  Integration- how volunteers are enveloped into the organization

   3.1.1    Social (example: inviting volunteers on informal staff outings, etc.)

   3.1.2    Professional (example:  inviting volunteers to staff meetings, etc.)

3.2 Appreciation- making volunteers feel appreciated

   3.2.1    Informal Recognition (example- verbal thank you, thank you notes, etc.)

   3.2.2    Formal Recognition (example- gifts, luncheons, role advancement etc.)

3.3 Sense of Community –belongingness or connection to the organization

   3.3.1    Membership (example: volunteers frequently come back to the organization, volunteers feel responsible for their role at the organization, volunteers see being a volunteer at that organization as a part of who they are)

   3.3.2    Support (example: volunteers are/feel supported, can easily get help from staff or other volunteers)

3.3.3    Influence (example: volunteers suggestions are listened to, volunteers have

leadership roles that influence the larger organization)

**Appendix C**

UNIVERSITY OF ILLINOIS
AT CHICAGO

Office for the Protection of Research Subjects (OPRS)
Office of the Vice Chancellor for Research (MC 672)
203 Administrative Office Building
1737 West Polk Street
Chicago, Illinois 60612-7227

**Approval Notice**

**Initial Review (Response To Modifications)**

November 8, 2011

Lindsay Bynum, BA

Psychology

1007 W Harrison Street

M/C 285

Chicago, IL 60612

Phone: (443) 414-7847 / Fax: (312) 413-4122

RE:     **Protocol # 2011-0641**

        **"A Voice to Volunteer Retention: An Organizational Perspective"**

Dear Ms. Bynum:

Your Initial Review application (Response To Modifications) was reviewed and approved by the Expedited review process on November 1, 2011.  You may now begin your research.

Please note the following information about your approved research protocol:

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**Please remember to add all key research personnel who are currently "to be determined," via a revised Appendix P accompanied by an Amendment form, prior to their inclusion in research activities.**

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**Please remember to submit letters of support from all non-UIC sites involved in the research prior to accessing/analyzing and/or recruiting/enrolling subjects at those sites.** Letters of support must be accompanied by an Amendment form when submitted to the UIC IRB.

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**Protocol Approval Period:**     November 1, 2011 - October 30, 2012

**Approved Subject Enrollment #:**  30

**Additional Determinations for Research Involving Minors:** These determinations have not been made for this study since it has not been approved for enrollment of minors.

**Performance Sites:**      UIC

**Sponsor:**         Department of Psychology

**Research Protocol:**

 a) A Voice to Volunteer Retention: Organizational Perspective; Version 1; 08/03/2011

**Recruitment Materials:**

 a) Script for Letters of Support (Telephone Script to get letters of support); Version 2; 10/04/2011
 b) Recruitment Script (Telephone Script to recruit participants); Version 3; 10/17/2011
 c) Recruitment Script (Email Script to recruit participants); Version 3; 10/17/2011
 d) Script for Letters of Support (Email Script to get letters of support); Version 3; 10/17/2011

**Informed Consent:**

 a) consent document; Version 2; 10/04/2011
 b) A waiver of documentation of informed consent has been granted under 45 CFR 46.117 for recruitment purposes only (minimal risk release of contact information; verbal recruitment; signed consent will be obtained at enrollment)

Your research meets the criteria for expedited review as defined in 45 CFR 46.110(b)(1) under the following specific categories:

(6) Collection of data from voice, video, digital, or image recordings made for research purposes., (7) Research on individual or group characteristics or behavior (including but not limited to research on perception, cognition, motivation, identity, language, communication, cultural beliefs or practices and social behavior) or research employing survey, interview, oral history, focus group, program evaluation, human factors evaluation, or quality assurance methodologies.

**Please note the Review History of this submission:**

| Receipt Date | Submission Type | Review Process | Review Date | Review Action |
|---|---|---|---|---|
| 08/08/2011 | Initial Review | Expedited | 08/11/2011 | Modifications Required |
| 10/12/2011 | Response To Modifications | Expedited | 10/13/2011 | Modifications Required |
| 10/26/2011 | Response To Modifications | Expedited | 11/01/2011 | Approved |

Please remember to:

→ Use your **research protocol number** (2011-0641) on any documents or correspondence with the IRB concerning your research protocol.

→ Review and comply with all requirements on the enclosure,
 "**UIC Investigator Responsibilities, Protection of Human Research Subjects**"

**Please note that the UIC IRB has the prerogative and authority to ask further questions, seek additional information, require further modifications, or monitor the conduct of your research and the consent process.**

**Please be aware that if the scope of work in the grant/project changes, the protocol must be amended and approved by the UIC IRB before the initiation of the change.**

We wish you the best as you conduct your research. If you have any questions or need further help, please contact OPRS at (312) 996-1711 or me at (312) 996-2014.  Please send any correspondence about this protocol to OPRS at 203 AOB, M/C 672.

Sincerely,

Sandra Costello

Assistant Director, IRB # 2

Office for the Protection of Research Subjects

Enclosures:
1. **UIC Investigator Responsibilities, Protection of Human Research Subjects**
2. **Data Security Enclosure**
3. **Informed Consent Document:**
   a) consent document; Version 2; 10/04/2011
4. **Recruiting Materials:**
   a) Script for Letters of Support (Telephone Script to get letters of support); Version 2; 10/04/2011
   b) Recruitment Script (Telephone Script to recruit participants); Version 3; 10/17/2011
   c) Recruitment Script (Email Script to recruit participants); Version 3; 10/17/2011
   d) Script for Letters of Support (Email Script to get letters of support); Version 3; 10/17/2011

cc:     Jon D. Kassel, Psychology, M/C 285
        Edison J. Trickett (faculty advisor), Psychology, M/C 285

**Table 1**

*Organizational Demographic Information*

| Id # | Organization type | Year founded | Number of staff | Number of Active Volunteers | Participant Job Description |
|---|---|---|---|---|---|
| 101 | community development agency | 1990 | 55 | 20 | special projects manager |
| 201 | Homeless services agency | 1989 | 80 | 1,000 | associate director of development and external relations |
| 301 | counseling organization | 2004 | 1 | 20 | executive director |
| 401 | youth recreation agency | 2007 | 2 | 14 | program director |
| 501 | long term shelter | 1994 | 25 | | volunteer coordinator |
| 601 | senior center | 1969 | 3 | 48 | volunteer coordinator |
| 701 | refugee resettlement agency | 1980 | 52 | 495 | volunteer coordinator |
| 801 | Hospital | 1893 | 425 | 200 | volunteer services manager |
| 901 | tutoring center | 2004 | 1 | 4 | site coordinator |
| 1001 | art and education program | 1996 | 8 | 60 | executive director |
| 1101 | latina empowerment agency | 1973 | 46 | 96 | program director |
| 1201 | educational support agency | 1898 | 100 | 50 | director of youth service |
| 1301 | senior volunteer program | 1973 | 4 | 770 | senior services director |
| 1401 | social service provider | 1917 | 3,000 | 17,000 | director of volunteer relations |
| 1501 | homeless service agency | 1976 | 120 | 150 | volunteer and community relations manager |
| 1601 | Hospital | 1897 | 5,000 | 1,000 | volunteer coordinator |
| 1701 | home for disabled | 1921 | 970 | 225 | director of volunteers |
| 1801 | youth development agency | 2007 | 3 | 400 | Director |
| 1901 | social services organization | 1954 | 3 | 13 | youth center director |
| 2001 | emergency services organization | 1915 | 50 | 3,500 | volunteer resources manager |

# V I T A

# L I N D S A Y   R .   B Y N U M

## EDUCATION

**2010-present University of Illinois at Chicago**

 M.A. Community and Prevention Research

**2005-2009 Johns Hopkins University 3.25 cum. GPA**

B.A. Psychology and Sociology

## RESEARCH EXPERIENCE

**2007-2010 The MORE Project:** *Multiple Opportunities to Reach Excellence*

Research Assistant

- Assist in clinical psychological research in support of a grant proposal
- Assist in literature review and writing of scholarly publications
- Conduct both parent and child interviews using a computer based battery
- Administer intelligence measures to children
- Contact participants to maintain confidence in the research
- Manage calendar and scheduling for all research assistants

**2006 The Lighthouse (Social Research Center)**

*Data Cleaning Intern*

- Screened and edited audio and written data using SPSS computer program
- Upheld integrity of the experiment by ensuring that errors were kept to a minimum, and that the interview script was followed correctly

## TEACHING EXPERIENCE

**Teaching Assistant [August 2010 – Present] University of Illinois at Chicago**

- Introduction to Psychology (PSCH 100)
- Introduction to Community Psychology (PSCH 231)
- Introduction to Research in Psychology (PSCH 242)

- Abnormal Psychology (PSCH 270)
- Statistical Methods in Psychology (PSCH 343)

**Guest Lecturer [March 2013] University of Illinois at Chicago**

- Current Topics in Community and Prevention Research (PSCH 539) – Dina Birman, Ph.D. "Retention and the Volunteer Experience: An Organizational Perspective"

**PUBLICATIONS and PRESENTATIONS**

- Cooley-Strickland, M., Bynum, L., Tang, L., & Griffin, R. (in preparation). The influence of neighborhood context on initiation of substance use among urban African American children. In Y.F. Thomas, L.N. Price, & A.V. Lybrand, Eds., *Drug Use Trajectories among Minority Youth.*
- Tasker, T.B., Bynum, L.R., Trickett, E.J., & Vinokurov, A. (2011, June), *Acculturative Stress: Community, Acculturative, and Demographic Predictors among Former Soviet Adolescents and Elderly*. Poster Presented at the 13th Biennial Conference of the Society for Community Research and Action, Chicago, IL.
- Bynum, L. R., (2011, October). Acculturation theory and measurement. In M. E. Wellman (Chair), *Community, Acculturative, and Demographic Predictors of Acculturative Stress: Adolescents from the Former Soviet Union.* Symposium conducted at the Annual Midwest Ecology-Community Psychology Conference, Chicago, IL.

**PROFESSIONAL AFFILIATIONS**

2010-present Society for Community Research and Action (Graduate Student Member)

**ACADEMIC HONORS & AWARDS**

2005-2009 Baltimore Scholars Program

2010 Abraham Lincoln Fellowship

**COMMUNITY ACTIVITIES**

**2008- 2009 SEED (Students Educating and Empowering for Diversity)**

- Diversity Educator
- Community Service Committee Member
- Co-leader 2009

**2012-2013 Student Leadership Development and Volunteer Services, UIC**

- Evaluator of current programming
- Consultant for re-visioning and future programming