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ASSOCIATION FOR VOLUNTEER ADMINISTRATION

The Association for Volunteer Administration, an international membership organization, enhances the competence of its members and strengthens the profession of volunteer resources management. Members include directors of volunteer resources in a wide variety of settings, agency executives, association officers, educators, researchers, consultants, students—anyone who shares a commitment to the effective utilization of volunteers.

Membership in AVA is open to salaried and non-salaried persons in all types of public, non-profit, and for-profit settings who choose to join with AVA to promote and support effective leadership in volunteerism.

AVA is an association run by its members. Active committees include: Professional Credentialing, Ethics, Fund Development, Organizational Relations, Communications, Member Services and Network Development. Members also plan the annual International Conference on Volunteer Administration, a major event held each year in a different city in the United States or Canada. This conference provides participants the opportunity to share common concerns and to focus on issues of importance to professionalism in volunteer administration.

Two major services that AVA provides, both for its members and for the field at large, are a professional credentialing program and an educational endorsement program. Through the process that recognizes leaders of volunteer programs who demonstrate professional performance standards, AVA furthers respect for and appreciation of the profession of volunteer administration. Similarly, AVA educational endorsement is given to those workshops, courses, conferences, and training events that provide opportunities for professional growth in volunteer resource management.

Finally, AVA produces publications including informational newsletters and booklets and ***The Journal of Volunteer Administration.***

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EDITORIAL

Because volunteers work within the broader context of organizations and communities, and because they have had and will have a significant role in the history and development of community agencies, the nature of volunteers and volunteer programs must be studied within the context of organizations and environments. (Silver, 1988, p. 25)

The articles in this issue focus on volunteers and volunteer resources professionals within the context of their organizations. They explore organizational strategies that support and strengthen volunteer efforts, and strategies that support and strengthen professional networking and advocacy.

Recruitment and Retention of Volunteers in Florida explores the recruitment and retention practices of Florida volunteer managers. The identification of organizational needs and the development of recruitment plans to address identified needs are indicators of the high degree of professionalism among administrators of volunteer programs in Florida. This study was done as an honors thesis by a student of volunteer management.

Managing External Grievances Against Volunteer Advocates explores complaints filed against volunteer ombudsmen and identifies strategies for improving organizational competence. While this study looks at volunteers in a specific setting, the findings can be applied to any volunteer program where volunteers have advocacy roles that can lead to conflict. Grievance and discipline policies are important considerations in all volunteer programs.

The next five articles are presented as Ideas That Work. The first two present strategies for empowering volunteers to strengthen and support their work within the organization. The third and fourth articles explore models for strengthening volunteer management professionals. The last article explores building virtual communities.

Critical Thinking: Helping Volunteers Make Better Decisions explores 14 strategies for teaching critical thinking skills to volunteers, so they are better prepared to respond to challenges they may face when interacting with clients and the community as representatives of the organization. *Partners in Caring* outlines a model for engaging volunteers to support patients and their families by providing computer assistance for online educational resources in Patient and Family Resource Centers. Creating this hospital-wide program requires system-wide organizational commitment and support.

Vision to Reality: A New Frontier for Volunteer Administration in Minnesota and *Creating a Statewide Virtual Network* describe two organizational development models for creating a statewide professional association for managers of volunteers. Both cases discuss the current environment for volunteerism and professional development and identify a growing need for a unified voice for the profession. Minnesota and Ohio are addressing this need by creating statewide professional membership associations that engage local networks to build state networks that support the national network.

The final article, *Building an Online Community* provides guidelines and a blueprint for creating online volunteer communities. This highly informative article is written by an active volunteer for two professional societies and several community groups who has helped build online communities. She offers us new ideas for providing organizational support to volunteers by posting schedules, resources and activities, and by encouraging ongoing dialogue.

Silver, Nora (1988). At the heart: the new volunteer challenge to community agencies. The San Francisco Foundation: San Francisco, CA.

ABSTRACTS

Feature

- ***Recruitment and Retention of Volunteers in Florida***

Jacqueline Anntionette Flynn, University of Central Florida
Mary Ann Feldheim, University of Central Florida

This article presents the findings of a survey of Florida volunteer managers in the fall of 2001 focusing on recruitment and retention practices. The types of recruitment strategies utilized are discussed, as well as the reasons people volunteer. Specific organizational strategies that improve volunteer retention are identified, and the use of volunteer training, job descriptions, and volunteer recognition are discussed. This study of the Florida experience in recruiting and retaining volunteers is intended to provide information to help nonprofit organizations improve these efforts.

- ***Managing External Grievances Against Volunteer Advocates***

H. Wayne Nelson, Ph.D., Assistant Professor, Towson University
F. Ellen Netting, Ph.D., Professor, Virginia Commonwealth University
Ruth Huber, Ph.D., Professor, University of Louisville
Kevin Borders, Ph.D., University of Louisville

This study's findings support enhanced efforts by program managers to document and analyze external complaints lodged against their volunteers who hold positions of public trust. Our analysis of one state agency's complaints filed against its volunteer elder-care advocates (ombudsmen) reveals several important findings, including care provider confusion about the volunteer ombudsman's resident defense role. Findings also show that a volunteer's aggressive style can spur anger and opposition, as can the errors of volunteers who are poorly trained in their job's investigatory and confidentiality procedures. Findings suggest that patterns emerging from external grievance data can be used to improve all aspects of organizational competence by identifying program training and ongoing internal communication needs; by suggesting screening techniques for the selection of more highly qualified volunteers; and by developing appropriate discipline and grievance protocols that are necessary to systematically resolve and prevent future problems.

Ideas That Work

- ***Critical Thinking: Helping Volunteers Make Better Decisions***

R. Dale Safrit, Ed.D., Associate Professor, North Carolina State University
Jo M. Jones, Ed.D. , Associate Professor Emeritus, The Ohio State University

Volunteer administrators cannot always be present when volunteers function in communities and interact with clientele. As non-formal representatives of non-profit organizations, it is imperative that volunteers be challenged to learn "how to think" rather than just "what to think." The authors describe 14 instructional strategies that may be incorporated into volunteer training that nurture the development of critical thinking. They include: critical analysis; debate teams; dramatization; action maze; critical incident; scenario building; Socratic questioning; creative visualization; listening teams; journal writing; quotations or cartoons; inventing; and, pluses, minuses, and alternatives. Nurturing critical thinking skills is a "value-added" approach to volunteer development resulting in sustained, meaningful volunteer empowerment.

- ***Partners in Caring: Administering a Hospital-based Volunteer for the Education and Support of Cancer Patients***

Joyce Nyhof-Young, Ph.D., Assistant Professor, University of Toronto
Audrey Friedman, M.S.W., Princess Margaret Hospital
Jennifer M. Jones, Ph.D., Assistant Professor, University of Toronto
Pamela Catton, M.D., Professor, University of Toronto

The patient education program at Princess Margaret Hospital (PMH), a comprehensive care oncology hospital within the University Health Network (UHN) in Toronto, has created a successful volunteer support strategy for patient education in which volunteers make an effective and personally fulfilling contribution to the education, support and empowerment of patients and families. Volunteer administration is a crucial and continually evolving component of our program. Our administrative model of volunteer recruitment, training and support is presented with the understanding that the strategies and principles that we have developed are transferable to other situations, including those beyond healthcare. While we recognize that

no one formula exists for a volunteer program, our model for the management and use of volunteers in our cancer hospital is presented to provide insights to those dealing with cancer and other chronic diseases, and to those working with volunteers in different settings.

- ***Vision to Reality: A New Future for Volunteer Administration in Minnesota***
  Judie Russell, Director of Volunteer Services for Children's Home Society of Minnesota
  Carol Thompson, Volunteer Leadership 2000
  Put at risk what you have become for the possibility of what you can be. (Anonymous)
  The idea of creating one strong, state-wide alliance to advance the profession of volunteer administration was not new in Minnesota. It had been discussed for years, but little had been done to turn vision into reality. Presented after the celebration of the first year of operation of a new statewide professional association, this article describes the vision of volunteer leaders in the state and chronicles the process that led to the creation of the new Minnesota Association for Volunteer Administration. The timeliness of moving in this new direction was critically important as events in the state continue to unfold.

- ***VONVA: Creating a Virtual Statewide Association***
  Meghan Kaskoun, Volunteer Manager, Aronoff Center for the Arts
  As we work to build credibility and strengthen our voice as professional mangers of volunteers, there is increasing interest in creating statewide professional associations that share resources and encourage professional growth and development. This article is an overview of Ohio's efforts to engage technology to build a virtual organization to unite local professional networks into a statewide professional association. This three-year effort is still a work in progress, but a small group with a consistent dream is making the vision a reality.

- ***Building an Online Community***
  Whitney Quesenbery, Whitney Interactive Design
  The rest of the world is using new technologies, so why not volunteer groups. Online communities are a way to extend your volunteer group into cyberspace, solving practical problems of holding a group together in these days of overloaded schedules, long working hours and even more complicated family lives. This article explains how to plan, set up and run an online extension for your volunteer groups.

Recruitment and Retention of Volunteers in Florida: Results From a Practitioner Survey

Jacqueline Flynn and Mary Ann Feldheim

Professionalization in the field of volunteer administration is growing rapidly. As a result of this trend, specialists in volunteer management by participating in research studies have assisted other volunteer managers in their daily responsibilities (Fisher and Cole, 1993). This paper builds on these works, and advances the profession of volunteer administration by sharing the results of an exploratory study performed in December 2001 that examined the volunteer recruitment and retention practices of nonprofit organizations in the state of Florida.

To begin, an overview of the literature on volunteer recruitment and retention will be presented. Then the methodology of the study will be described, and the findings of the study presented. The article concludes with a discussion of the significant findings and the importance of these to the profession of volunteer management.

VOLUNTEER RECRUITMENT AND RETENTION

Attracting and retaining valuable volunteers for an organization requires a strategic approach, careful planning, and the ability to tap into, and capitalize on the strengths, skills, and experience of those most willing to commit time and energy to help an organization reach its goals (Walker, 2001).

Establishing a structure for the recruitment and retention of volunteers is a fundamental element in managing a volunteer program (Hansen, 2000), and effective recruitment and retention practices are essential in an organization that utilizes volunteers (Bradner, 1999). Further knowledge in this area can improve the volunteers recruitment and retention practices of volunteers within the field.

Recruitment

It is difficult to isolate the topic of recruitment, because its ultimate success is intertwined with the development of high-quality volunteer assignments, and with having an organization prepared to utilize volunteers' time and talents effectively when they arrive (Stallings, 2001). However, four specific types of recruitment have been identified and discussed in the literature.

The four recruitment methods are warm body recruitment, targeted recruitment, concentric circles and ambient recruitment. First, warm body recruitment seeks to recruit large numbers of volunteers without specific skills, but who will do the activity required by the organization. This has worked well for environmental groups that pick up litter or clean the beaches. Second, targeted recruitment requires a specific skill or talent, and the organization must seek out the limited individuals who have those skills. Third, concentric circles recruitment relies on word-of-mouth from other volunteers in the organization. Satisfied volunteers recruit friends and family to volunteer with the organization. The last type of recruitment is ambient

Jacqueline Flynn is a graduate student at University of Central Florida in the College of Health and Public Affairs with a major in Public Administration. She has 3 years of volunteer experience as a camp counselor for the Muscular Dystrophy Association. Her honors thesis for her BA degree focused on Volunteer Management. Upon the completion of her studies, she plans to seek a position in the field of volunteer administration.

Mary Ann Feldheim has extensive volunteer experience as a direct service health care volunteer, as a board member, as the Director of Volunteers at a large hospice, and as the creator of a Hospice Volunteer Training Manual that won recognition from the National Hospice Organization. Currently, she is an assistant professor at the University of Central Florida and the coordinator of the nonprofit management certificate program, where she teaches graduate and undergraduate courses in volunteer management.

recruitment, which refers to recruiting volunteers within a closed system, such as a corporation or a church congregation. Recruitment is done by the other organization, but the nonprofit must establish and maintain the relationship with the closed system organization (McCurley, 1995).

Recruitment techniques must to be matched to the challenges, complexities, and risks of the job (Bradner, 1999). Before the recruitment campaign is launched, it is beneficial for an organization to develop a strong and compelling mission statement, conduct a needs assessment, create a climate of agency readiness for volunteers, and develop written job descriptions for the volunteer positions (Bradner, 1999). Organizations should also determine why they want volunteers and design valuable work assignment (Ellis, 1994). The mission statement should be used as a baseline from which goals are created, and strategic objectives are reached (Glasrud, 2001).

An important key to recruitment is understanding why people volunteer and finding ways to meet those needs. Volunteer managers need an understanding of what motivates people to commit their personal resources, emotional energy, and time to volunteering (Meneghetti, 1999). Having insight into the reasons why people volunteer helps the volunteer administrator attempt to fulfill these needs, resulting in a higher volunteer retention rate.

Retention

Retention of the volunteer staff is an important part of guaranteeing the success of a program. Written job descriptions clearly inform the volunteer of duties and organizational expectations, and provide ways to incorporate the unique talents of the people contributing their time (Masaoka, 2001). These job descriptions help to recruit, screen, place, and manage the volunteer workforce (Bradshaw, 1996). Without a quality job description, the chance of an uncompleted job or a possible misunderstanding of the job increases (Piper, 2000).

In addition, the training, education and development of a volunteer workforce can have a remarkable effect on improving the retention rate of volunteers. Volunteer managers must take steps to help their volunteers grow, learn, and build self-esteem to maintain their interests in the program (Bradner, 1999). Training is also important in risk management. Risks to the organization are minimized when volunteers are prepared for the tasks they are assigned to accomplish. (Ott and Nelson, 2001). Simply acknowledging the efforts of the volunteer can also raise the rate of retention. This can be achieved by a smile and a greeting, a thank you note, a phone call, or through a formal volunteer recognition program (Yoho, 2001).

The literature review found that a limited amount of research has been conducted on volunteer recruitment and retention strategies, and the findings of this study are intended to advance the field.

METHODOLOGY

This exploratory study was sponsored by the Burnett Honors College at the University of Central Florida, as an Honor in the Major thesis. Data were collected in the fall of 2001. A self-administered questionnaire was sent to the total population of 485 volunteer administrators of non-profit agencies in the state of Florida, as identified by the GuideStar and Philanthropic Incorporated database. Collection methods included self-administered questionnaires, followed by telephone calls and emails to increase the completion rate to 33% after accounting for undeliverable questionnaires.

The data collected from the surveys were analyzed using descriptive statistics, a medium for describing data in a manageable form (Babbie, 1990; Meier and Brudney, 1997). The majority of the data is presented using percentages, with the application of cross tabulations to compare possible relationships between two variables (Parker & Rea, 1997).

FINDINGS AND IMPLICATIONS

Attracting and retaining the best volunteers for an organization requires a strategic approach, careful planning, and the ability to tap into and capitalize on the strengths, skills, and experience of those most willing to com-

TABLE 1

Recruitment Methods

Method of Recruitment	Always	Sometimes	Rarely	Never
Warm Body Recruitment	14%	25%	19%	42%
Targeted Recruitment	31%	45%	.8%	16%
Concentric Circles Recruitment	43%	44%	4%	9%
Ambient Recruitment	18%	36%	19%	26%

N= 141

mit time and energy to help the organization reach its goals (Walker, 2001). Many factors are incorporated into the volunteer recruitment and retention process. Organizations must deliberately plan to attract and keep the type of volunteers needed to fulfill their mission.

In Table 1 types of volunteer recruitment methods used in Florida nonprofits are presented. Concentric circles recruitment was used most frequently by 87% of respondents (Always 43% and Sometimes 44%). This finding supports the literature, which indicates that organizations have found person-to-person volunteer recruitment to be very successful (Bradner, 1999).

Targeted recruitment was the second most frequently used recruitment method with 76% of respondents using this method, however only 31% of respondents used this method all of the time. The least frequently used form of recruitment was warm body recruitment with 42% indicating they never used this method. To make this information more meaningful, the data were analyzed to determine the degree to which different organizations used the different recruitment strategies on a consistent basis (Table 2).

Here the study found three main areas of interest. First, the utilization of concentric circles when dealing with youth (90%) and elder (80%) services recognizes the importance of referral in building a volunteer base for dealing with vulnerable populations. Second, when direct client contact is less, the utilization of warm body recruitment increases as seen in its higher usage by environmental services (38%). Third, the use of target recruitment predominates in educational services (95%) reflecting the need for a skill base to share knowledge.

In addition, to matching the type of recruitment with the specific needs of the organization, volunteer administrators need to be aware of the reasons people volunteer.

Because people volunteer for a variety of reasons the most successful organizations have abandoned the "sign-up sheet" approach to volunteer recruitment and opted to practice a more strategically planned method (Walker, 2001). By determining the reasons that induce people to donate their time, talents, and experience, an organization is more likely to sustain an effective volunteer workforce. In Table 3 the reasons for volunteering, as perceived by experienced volunteer administrators, are presented.

For survival, many nonprofit organizations are becoming more business-like and embracing the economic model, which focuses on self-interest. In volunteer management it is important not to loose sight of the value of altruism, which is voluntary, intentional behavior that benefits another. Inherent in

TABLE 2

Recruitment Type "Always" Used by Organization Type

Organization Type	Warm Body	Concentric Circles	Target	Ambient
Public Service				
Fire Services	13%	94%	50%	31%
Educational Services	6%	88%	95%	50%
Environmental Services	38%	62%	60%	62%
Social Service				
Youth Services	9%	90%	78%	63%
Elder Services	10%	80%	70%	50%
Health Services	27%	91%	64%	72%

N= 141

TABLE 3

Reasons for Volunteering

Rank	Most People Volunteer to...	Agree	Disagree	Neutral / Don't Know
1	Help others by serving the community.	96%	2%	2%
2	Make the world a better place.	89%	9%	2%
3	Enjoyment from working with the client population.	85%	12%	3%
4	Socialize with other volunteers.	67%	31%	2%
5	Gain career related experiences.	58%	36%	6%
6	Repay benefits received.	45%	48%	7%
7	Fulfill a requirement.	43%	48%	10%
8	Enhance prestige.	42%	53%	5%
9	Carry out a religious belief.	38%	54%	8%
10	Provide an appeasement of guilt.	12%	76%	12%

N=141

altruism is the understanding that this behavior is not motivated by the expectation of external rewards or avoidance of externally produced punishments (Chou, 1998). In this study, volunteer motivation was predominantly perceived to be altruistic, with 96% of respondents indicating people volunteered to serve the community, and 89% of the respondents indicating that most people volunteer to make the world a better place. On the other side of the scale, only 12% of respondents felt that people volunteered to appease feelings of guilt.

The responses from the Florida survey are comparable to those obtained by the Peter Drucker Foundation, which found a common reason for volunteering was to make a difference in one's community, one's society, one's own country, and beyond (Drucker, 2001).

Personal satisfaction and altruism are compelling reasons to volunteer, but in most cases, people must be assured of additional benefits before they will commit their personal time and energies to a cause (Walker, 2001). The importance of organizational strategies to enhance the volunteer experience cannot be understated. Four areas of organizational strategies were explored: mission-related roles, volunteer training, volunteer recognition practices, and written job descriptions.

For volunteers to remain with an organization, they must feel that their work has meaning. Roles that support the mission help communicate the importance of the volunteer to the organization. In Florida 93% of respondents indicated that there was consistency between the mission and the roles of volunteers in achieving that mission.

Training can improve the retention of volunteers by developing knowledgeable and skilled volunteers, while protecting the organization from liability (Bradner, 1999; Ott and Nelson, 2001). Here the findings indicate a significant portion of the respondents (78%) provide training for the volunteers.

Volunteer recognition communicates to volunteers that their work makes a difference to the organization, clients and the community. Even if the work itself provides satisfaction, acknowledgement and recognition are important in meeting the needs of the volunteers, if they are to continue with the organization (Ott and Nelson, 2001; Stepputat, 1999). In Florida 69% of respondents stated that their organization had a volunteer recognition program, which indicates a strong awareness of this aspect of volunteer management.

Job descriptions for volunteers are an important part of volunteer management and the risk management program of any non-profit organization. With a well-written job description, the organization delineates what a volunteer will do and the limits of his or her responsibility. The job description also provides the framework for evaluating the work of the volunteer, protecting the organization from liability, and strengthening and improving communication between the board

and management (Piper, 2000; Stepputat, 1999). Having volunteer job descriptions reflects an advanced volunteer program, and in Florida 60% of respondents indicated that their organizations had clear job descriptions for each volunteer position. Based on these findings, volunteer management in Florida's nonprofits is moving toward a greater level of management sophistication.

The success of retention strategies in Florida nonprofits was indicated when 92% of the respondents replied that volunteers are content and satisfied with the volunteer experience. Volunteers who feel as if they are making a real difference while learning new skills, making important community contacts, or gaining new experiences in the process will be more likely to continue to volunteer for an organization (Walker, 2001)

When asked if the recruiting practices of the organization were successful, only 73% indicated that they were. This may be indicative of the type of recruitment strategies being utilized, or of the transient nature of volunteers for most organizations. There did not appear to be a relationship between the type of recruitment, and the level of success indicated by respondents.

The extensive use of specific recruitment and retention strategies speaks to a growing professionalization of volunteer management in Florida. Yet, it is very interesting to note that only 25% of the respondents were in a position with the title of volunteer administrator, and only 39% of respondents indicated they had received any training in volunteer management. These figures reflect the struggle that volunteer administration faces in many organizations with limited resources.

STUDY LIMITATIONS

The Florida study found a very encouraging picture of volunteer recruitment and retention practices, as indicated by volunteer administrators in nonprofit organizations. There were, however, limitations to the study in the form of a time constraint, limited access to qualified personnel for completion of the questionnaire, a small budget, and questionnaire design errors. Specifically, the questionnaire design errors include, but are not limited to, the tone used in the responses to the management section questions, and a poor choice of response format. Despite the limitations and constraints, supportive and valuable findings were discovered that assist in understanding the field of volunteer management in the state of Florida.

CONCLUSION

This study explored the recruitment and retention practices of volunteer administrators in the state of Florida. What emerged from the study were indicators of the professionalization of the field of volunteer management. The first indication of professionalization was found in the use of specific recruitment strategies to meet organizational needs. Identification of an organizational need and the development of a recruitment plan to meet that need reflect, sophistication in volunteer management, such as concentric circle recruitment to serve vulnerable populations.

The second indication of professionalization was found in the high percentages of organizations that use volunteer retention strategies. Strategic thinking is demonstrated when the mission becomes the driving force for the organization (Bryson, 1995) and the volunteer program. An altruistic mission that provides a volunteer with opportunities to serve the community is an invaluable recruitment and retention tool, meeting the need of most volunteers to do meaningful work. The high percentage of respondents indicating the use of volunteer training is another sign of professionalism, and a way to demonstrate the importance placed on the work provided by volunteers. A formal recognition program is another professional tool found in a significant number of Florida nonprofit organizations. Lastly, the fact that 60% of Florida nonprofit organizations have clear job descriptions for each volunteer position is very significant. Job descriptions are the basis for performance evaluations and for risk management programs, which are found in the more professional organizations.

These findings provide a picture of a state where volunteer administration is struggling

to provide for the needs of the volunteers and the needs of the organization, despite limitations in volunteer management education (61% without education in volunteer management).

To address the issue of education, universities are increasingly offering courses in nonprofit management. This study is the direct result of a student becoming so excited about volunteer management after taking a course, that an honors thesis was developed. Not only are practitioners focusing on the field, students are seeing volunteer management as a professional opportunity. This study of volunteer management in Florida can provide the field with useful information linking the literature and practice, and it can serve as a guide to future students on how to go from the classroom to the field.

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Managing External Grievances Against Volunteer Advocates

H. Wayne Nelson, Ph.D., F. Ellen Netting, Ph.D., Ruth Huber, Ph.D., and Kevin Borders, Ph.D.

Discipline and grievance procedures are commonplace in the policies and procedures handbooks found in human service agencies. When counseling, gentle reminders, and informal problem resolution fail, formal disciplinary procedures are essential when a client, or community member has a problem with an employee's behavior, attitude, or ethical conduct. When grievances are filed, it is important to distinguish between worker and agency performance problems (Pecora & Wagner, 2000, p. 416). In the process of dealing with complaints against staff behavior, advice is available in the human service management literature on how to be fair to the employees ... avoid capricious actions, and [ascertain that the] disciplinary process will hold up in court (Brody, 2000, p. 158).

Typically, the subject of grievance procedures are paid employees, but what happens when grievances are filed against volunteers in complex positions of public trust? Complicating the situation even more, what happens when these volunteers have strong (some would say intrusive) investigative powers, and enthusiastically pursue roles that often anger providers, other government officials, a resident's family member, a client, or all of the above? In this paper we examine what one state program has done to document and handle complaints filed against volunteers in their long-term care ombudsman program, and how this complaint data is used to improve program quality. We begin with a brief background statement, then examine grievances filed over a 23 month period, and end with implications for managers and supervisors of volunteer advocates.

BACKGROUND

A federal mandate in 1978 established the Long-Term Care Ombudsman Program (LTCOP) to address poor conditions in U.S. nursing homes. Over the years ombudsmen services have been extended to include other types of long term care facilities. Information about the program and its extensive reliance on volunteers (more than 90% of the program's staff nationally are non-paid) has been previously elaborated (Netting, Hubers, Borders, Kautz, & Nelson, 2000).

The informal nature of the ombudsman role invites conflict and misunderstanding partly because ombudsmen often have to change complex and urgent situations without having a great deal of formal authority (Netting, et al., 2000). They must persuade elder care operators to do things differently through personal persuasion. This can be trying. Despite their record of success in improving resident care (Cherry, 1993), the volunteer ombudsman's partisan, patients-rights role has been labeled one of the most difficult in the field of aging (Monk, Kaye & Litwin, 1984). Opposition and conflict are common (Nelson, 2000).

Therefore, it is not surprising that this tension and misunderstanding will manifest itself

H. Wayne Nelson, Ph.D., is an Assistant Professor in the Health Science Department at Towson University where he teaches courses in Health Care Administration and Gerontology. Prior to entering the academy, Dr. Nelson served 17 years as the Deputy Director of the Oregon State Office of the Long Term Care Ombudsman, where a large share of his responsibilities focused on training and supervising the agency's volunteers.

F. Ellen Netting, Ph.D., is Professor of Social Work at Virginia Commonwealth University where she teaches planning, administration and policycourses. Her practice experience includes directing a community-based Foster Grandparent Program, coordinating volunteers in offices on aging, and training volunteer long term care ombudsmen. She has served two terms on the Board of Directors of the Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA).

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in grievances being filed against volunteer ombudsmen by providers with program officials. Yet, only one of the more than 600 state and local ombudsman programs is known to record and analyze this external grievance data—the Oregon State LTCOP. We had access to this data and present some of it here.

Program Background

The grievance data was collected from the Oregon LTCOP for the period of May 1996 through April 1998. During this time, an estimated average of 210 certified volunteers served throughout the state. These volunteers were nearly two-thirds female, typically retired, in their mid-sixties on average, and more highly educated then the general public.

While most of these volunteers were assigned to specific nursing homes (115), a few veteran volunteers (15) served on call wherever they were needed, and 80 others chose to serve in less medically intense community residential elder care settings. All volunteers were trained and managed by a small paid staff of six who were in turn, supported by two administrative assistants.

Trainees who complete 48 hours of initial training and pass a certification exam are contractually obligated to spend an average of four hours a week in their assigned facilities. Volunteers are also required to complete an average of 8 hours continuing education annually to maintain their certification. Volunteers have the same legal access rights and responsibilities to investigate and resolve complaints as do paid staff.

External Grievance Procedures

The agency has clear policies regarding the intake, documentation and processing of complaints against ombudsmen. Most grievances are lodged via a widely publicized statewide toll-free telephone line. The receptionist refers grievances to the immediate supervisor of the charged party, or if unavailable, to the next securable manager. Whoever takes the call must record key aspects of the grievance in a central log, even if the charge is quickly cleared up as a simple misunderstanding.

Conversely, in serious cases requiring a full investigation, the supervisor sends the complainant a letter restating the issues and alleged infractions, and requesting the return of a signed form confirming the complainant's intention to pursue the grievance. The program supervisor then investigates the complaint to determine its validity, following up with any warranted counseling, coaching, or disciplinary action.

Issues of personal deportment (inappropriate language, dishonesty, ethical lapses, patterns of aggressiveness and so forth) are handled according to the agency's classic progressive disciplinary process, as published in the agency's administrative rules. This corrective process is consistent with recent research suggesting that highly trained volunteers should be treated no differently than other employees (Liao-Troth, 2001). For minor problems, the process begins with counseling or a verbal reprimand, progressing through a series of written warnings and ultimately culminating in suspension or termination, which can be invoked as the first step for serious misconduct. Performance problems that typically signal a lack of knowledge are handled less formally, usually involving some form of sympathetic coaching and retraining. Here, the goal is to help substandard performers become effective advocates. When this fails, however, persistent, non-correctable performers are subjected to the disciplinary procedures outlined above.

CHARACTERISTICS OF GRIEVANCES FILED

Eighty-six individual grievance cases, containing 194 distinct sub-issues, or complaints were charged against ombudsmen during the 23 month period under consideration. Grievances were filed against 54 individuals, including 3 paid and 51 volunteer ombudsmen, for an average of 3.7 complaints per ombudsman within a range of 1 to 14 complaints. Only nine volunteer ombudsmen were the subject of more than two separate grievances during this period, with the two most complained against volunteers tying at five grievances each, accounting for a combined total of 27 complaints (with the majority relating to demeanor).

Types of Complaints & Verification Rates

Types of complaints and verification rates are presented in Table 1. Demeanor (n = 64) including rude, aggressive, demanding, or blaming behavior is the leading single complaint issue category, accounting for 32% of all complaints. About a third of these charges (n = 20) were verified or partly verified by program management, with 12 issues in dispute or still under investigation when these data were collected.

Protocol violations (n = 40) were the second leading complaint category. These purportedly concern volunteers not following legally established job standards. Issues repeated in this grouping include ombudsmen: not wearing identification (n = 7), entering resident rooms without knocking (n = 4), not announcing their presence upon entering the facility (n = 3), or attempting to access records without appropriate authority (n = 4), and so forth. Thirty-eight percent of these cases (n = 20) were verified or partly verified by program staff with nine being disputed or under continuing investigation. Together, this and the foregoing category comprised more than half (54%) of all complaints.

Disruptive behavior is the third leading single issue category (n = 14) representing 7% of all complaints. This classification actually refers to the ombudsman's time in the facility. Typical allegations include charges that volunteers were demanding too much staff time, interrupting treatments, or visiting at inconvenient times, such as in the midst of "feeding." Only one of these complaints was even partly verified, as an ombudsman is allowed by law to enter the facility at any time the ombudsman feels it is necessary.

Alleged "confidentiality infractions" constitute the fourth leading, albeit tiny, single issue category (n = 7), representing only 4% of all complaints. Only two of these charges were verified by program staff, though two others were either disputed or still open at the end of the period studied. Confidentiality infractions entail the ombudsman disclosing the name of a complainant or witness without proper authorization, which is strictly prohibited by law.

The general category of prima facie invalid complaints represents about 16% of all complaints (n = 31). This broad grouping contains a range of charges that the volunteer manager recognizes as invalid at first impression. Examples include allegations that the volunteer ombudsman took the resident's side, investigated a complaint, apprised a resident of her right to refuse treatment, refused to divulge the name of a complainant, or reflected a concern that the ombudsman was only " a volunteer." Of course, all of this is entirely appropriate for an ombudsman. Indeed, the very fact that these concerns were lodged as formal complaints is proof of the complainant's fundamental misunderstanding of the volunteer ombudsman's role.

The "other" category (n = 38) comprises 37 disparate issues representing 21% of all complaints. These wide ranging issues generally question the volunteer's "common sense." Examples include charges that the ombudsman contacted an employee at home, interrogated a child, gossiped with family, aggressively solicited problems, or failed to return phone calls, and so forth.

TABLE 1

Complaints by Type and Numbers Verified or Partly Verified, Not Verified or Withdrawn, and Ongoing or Disputed

Complaint Category	Total	Verified Partly Verified	Not Verified or Withdrawn	Ongoing or Disputed
Demeanor	64	20	32	12
Protocol Violations	40	15	16	9
Disruptive Behaviors	14	1	13	0
Confidentiality Infractions	7	2	3	2
Prima facie invalid	31	0	31	0
Other	38	11	23	4
Total	**194**	**49**	**118**	**27**

Status of Complaint

Nearly a third of all complaints (27%) were either verified or partly verified, while 59% were either not verified or withdrawn. Partly verified complaints (13%) often indicate a "he-said-she-said" situation and inevitably become cautionary episodes for the charged volunteer because program supervisors use these opportunities to clarify all the issues surrounding any allegation. All prima facie invalid complaints automatically fall into the not verified category (48%) as self evidently false. The "withdrawn" category (11%) constitutes cases that were closed for various reasons by the complainant: perhaps a wish to avoid the time and bother, or fear of retaliation, or a realization that they may be in the wrong. Ongoing cases (4%) are those not completed during the period under study. Disputed cases (10%), on the other hand, were either undergoing re-investigation, or some higher level review due to the complainant's credible persistence.

Complaint Sources

A single grievance may contain multiple complaints, as shown in Table 2. Sources of complaints roughly correspond to the pattern of volunteer facility assignment with only a slightly higher rate of complaints coming from community based settings. As expected, nearly half of all complaints were lodged by nursing home management (administrators and directors of nursing combined), with community based settings accounting for 40% of all complaints.

The number of complaints lodged by resident family members, although higher than expected, is still negligible. Seldom concerning protocol issues, these complaints typically challenged the ombudsman's involvement in family affairs.

Charges made by other government officials generally concerned ombudsman protocol issues (such as erroneous rule interpretations, or, in one case, tipping off a facility to another agency's investigation which was substantiated and resulted in the volunteer's termination).

Disciplinary Actions

Consistent with the literature on volunteer management, substantiated complaints regarding conduct or serious performance infractions usually resulted in disciplinary or formal corrective actions along a progressive continuum. Nearly all verified and partly verified complaints resulted in some form of coaching, counseling or informal education as a natural by-product of the supervisor reviewing appropriate role expectations during the course of the investigation.

Where clear patterns of substandard performance or serious errors were recognized, there was evidence of formal interventions, often taken in consultation with upper management. During the study period, verbal reprimands were recorded in three cases and two volunteers were required to participate in some form of re-training. One volunteer was assigned a "buddy" for accompaniment to the assigned facility, not only to model appropriate behavior, but to provide a witness who might discourage unfounded charges.

TABLE 2

Grievance Sources & Numbers of Complaints

Grievance Source	Number of Grievances	Number of Complaints	% of Total Complaints	Average Number of Complaints Per Grievance
Family Member	12	15	8%	1.3
Community Care	25	76	40%	3.04
Nursing Home Director of Nursing	7	18	9%	2.6
Nursing Home Administrator	34	69	35%	2.0
Government Official	3	6	3%	2.0
Other	4	10	5%	2.8
Total	**86**	**194**	**100%**	**NA**

Another volunteer experienced a series of progressive disciplinary actions before being terminated. Two letters of apology were sent to facilities where volunteers had erred. Two other volunteers resigned when they were warned about possible demeanor problems. A third volunteer resigned upon being suspended for some high-handed bluffing and inappropriate conduct. A fourth volunteer resigned despite being defended by a supervisor against six out of seven charges, as well as the demands that the volunteer be removed from the facility (the volunteer insisted on 100% support, and bridled at the fact that one minor charge was substantiated by the supervisor). Conversely, two ombudsmen were reassigned by the program when their repeated communication problems destroyed their credibility with providers.

IMPLICATIONS FOR MANAGERS AND SUPERVISORS OF VOLUNTEER ADVOCATES

Volunteers are an integral part of the advocacy labor force in the United States. Grassroots organizations, nonprofit agencies, and even state-level, public organizations use volunteers. When volunteers are used in advocacy roles, it should be expected that their actions will be subject to question if they perform their roles at all well. An advocate who does not create some degree of resistance or anger on the part of a targeted group, whether it is a nursing home or a public bureaucracy, is likely not fully engaged in the advocacy role. By design, volunteer advocacy programs will spark intense reaction when community problems escalate.

The ombudsman program in this study, therefore, has normalized a grievance protocol in which managers expect that complaints will occur. Although grievance procedures are often viewed as internal mechanisms used by employees who feel unfairly treated, the focus of the grievance process described here is an external mechanism designed to receive complaints from multiple community sources. Certainly, the same process can (and should) be used internally, but the point is that volunteer advocates will likely upset or even alienate other community agencies, organizations, and groups when they speak out on behalf of unpopular, oppressed, or vulnerable clients.

Our findings shed light on the nature and intensity of provider opposition to program representatives, the vast majority of whom are volunteers. This is reflected not only in the numbers of grievances filed, but also by inferences drawn from between-the-line clues and from an evaluation of whether or not a grievance appears to be substantive, frivolous, or even "political" in nature. Having a mechanism for filing grievances in place before volunteer advocates are recruited, and being certain that it is part of the volunteer handbook, is a logical beginning. This means that volunteers need to be oriented and trained with full knowledge that there is an inevitability of having grievances filed if they fully manifest their advocacy roles—or err in their mission. Making this clear in the beginning can screen out volunteers who want to be liked by everyone, or who shun conflict and controversy. It also sets explicit standards for acceptable behavior.

Our findings also support the widely voiced concern that providers are not always clear about the role of the volunteer ombudsmen (Connor, & Winkelpleck, 1990; Nelson, 1995). The systematical collection and analysis of externally filed grievance data offers program officials an idea about the extent, depth, and nature of any role confusion by outsiders. Such role uncertainty would manifest itself in grievances revealing a fundamental misunderstanding about the volunteer's role and strategic orientation. In the case of the ombudsman program, for example, if a provider complains that the volunteer has taken the resident's side, monitors staff actions, or has recommended changes in staff practice, then, the provider has literally accused the volunteer of doing appropriate ombudsman work. But to providers who see ombudsmen volunteers as neutral mediators, facility boosters or friendly visitors—as many do (Connor & Winkelpleck, 1990)—then any evidence of watchdogging would seem to present axiomatic evidence of a volunteer gone astray.

At a more technical level, grievance data can reveal provider (and other long-term care

stakeholders, including the resident's family members) confusion about a wide range of ombudsman protocols including access authority, confidentiality, investigative procedures, mandatory reporting responsibilities, and so forth. All this information can help decision-makers develop evidenced-based outreach and community education initiatives to help clarify external role-holder expectations about the volunteer ombudsman's rightful niche in the long term care system. For volunteer managers in general, it means that being sure volunteers are oriented to their roles is one thing, but doing one's best to convey the nature of volunteer advocacy roles to community groups and organizations with whom the volunteers will come in contact is an ongoing and necessary process.

Taking this a step further, it is clear that volunteer programs that describe themselves as advocacy-oriented must carefully define what advocacy means for them. Certainly, volunteers can be public relations persons in the local community, but if one is recruiting watchdog and reformist volunteers (like ombudsmen), public relations may actually be strained if they perform up to their full potential. Clarifying roles when volunteers are recruited, and consistently reinforcing these roles is critically important.

It is also important, however, not to be too prescriptive in developing these policy guidelines—especially regarding the informal/interpersonal aspects of advocacy and problem solving. Human behavior is so variable, that any attempt to spell out every contingency would be impracticable and is inevitably doomed to fail. While volunteer advocates must know significantly relevant laws and rules, and must be able to acquit themselves properly, program policies must allow room for volunteers to improvise and adapt their behaviors in response to a staggering variety of cues and conditions. It is better, then, that program protocols merely communicate safe boundaries whenever possible, and not be so detailed as to multiply the chances of transgression which will only strangle volunteer initiative—and bog the whole program down in a disciplinary nightmare.

It should also be stressed how grievance data can be used by managers to help evaluate not only individual employee performance, but also the overall quality of the program's volunteer selection, support, and training processes—which are frequently criticized as inadequate in the literature (Nelson, 1995). In this sense, grievances constitute negative outside assessments that are otherwise difficult to obtain, but invariably useful to managers and policy makers. Such information can augment internal program evaluations used to validate human resource management processes and to identify areas needing improvement. For example, program wide trends in grievances concerning the local volunteer's failure to appropriately access resident medical records may well suggest a critical training need. Conversely, a series of complaints about an individual volunteer's hostile behavior may suggest a need for individual counseling or progressive discipline. In Oregon, complaint data (as reported here—no details that would breech confidentiality) is shared with serving volunteers during annual training conferences to underline the importance of good comportment and to review key job risks and pitfalls. As such, it presents a cautionary tale. But given the relatively low rate of valid external complaints and the program's comparatively limited need to resort to formal disciplinary measures, it also confirms that most volunteers are serving competently, and supports the program's corrective processes as just and non-threatening. Finally, collecting and analyzing complaint data and sharing it with program recruiters underlines the importance of screening and selection processes that weed out temperamentally ill suited or otherwise incapable candidates.

Although some managers might blanch at the thought of documenting volunteers gone astray, doing so actually speaks to a high degree of managerial accountability. Volunteer advocates deserve a fair and expeditious means to resolve complaints against them. A well designed external grievance system linked to a counseling and progressive disciplinary process allows for the quick formal vindication of appropriate acting volunteers, or for the coaching, counseling, and constructive criticism that can turn substandard perform-

ers into effective advocates. In sum, volunteer advocates have an ethical responsibility to minimize harm, and being aware of complaint trends provides a useful tool to achieve this goal.

Another benefit of a formal managed grievance process is that it can channel sometimes heated conflict about the program into processes that are formally controlled by managers. Without this mechanism, aggrieved parties can more easily sidestep program officials by complaining to "outsiders" including higher government authorities. But when a grievance process is formally established higher authorities generally feel compelled to redirect complainants back to an established proceeding. To be sure, aggrieved parties not satisfied with the outcome of this process can still appeal to higher authorities, but their heat is often drained, and if the program has acted in fair accordance with its own well designed and managed guidelines, it has already prepared its best defense.

CONCLUSION

In sum, the data presented here underline the need echoed in the literature for community education to clarify, for both provider and citizen, the volunteer advocate's roles and responsibilities. These data suggest that program managers should pay close attention to demeanor and communication issues during the screening and the initial training phases of the volunteer certification process. Whether verified or not, the perception of an aggressive, blaming, or officious demeanor is inflammatory. Moreover, volunteers should be trained to expect a certain degree of resentment and resistance, and should be taught how to handle it without escalating distrust and tension. In the case of the ombudsman program, ongoing training on volunteer access and other investigatory protocols and confidentiality requirements would also appear to be good "risk-management" measures. More importantly, grievance data represents a rich source of legitimate feedback that can identify problems with external stakeholders and be used to develop external education programs to better link volunteer advocates to the communities they serve.

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Critical Thinking: Helping Volunteers Make Better Decisions

R. Dale Safrit, Ed.D., and Jo M. Jones, Ed.D.

Today's non-profit organizations are increasingly called upon to implement more programs and reach larger numbers of clientele without substantial increases in financial, material, and paid staff. Consequently, these organizations must rely more heavily upon volunteers to assist and manage organizational programs. Volunteer administrators cannot always be present when volunteers function in the communities and interact with clientele. As non-formal ambassadors and representatives of non-profit organizations and programs, it is imperative that volunteers be challenged to learn "how to think" rather than just "what to think." They must develop the personal capacities to make critical decisions regarding their actions on behalf of the organization. Unfortunately, such critical decisions in today's highly complex and rapidly-changing social environment are often without simplistic "right" or "wrong" answers or easily-reached solutions. If volunteers are not fully prepared to deal with the ambiguities and situations that demand on-the-spot decisions, they may contribute to issues for the program and organization, and may become more of a liability than an asset. Finally, today's volunteers are increasingly demanding to be part of organizational decision-making related to the programs and activities with which they are involved. Safrit and Merrill (1999) reinforce this observation when they concluded that "Today's . . . volunteers want to be part of the decision-making process, engaged in the planning and evaluation of programs and projects. They look for leadership rather than management" (p. 38).

Additionally, volunteers can be highly effective teachers in a non-profit organization, both of an organization's clientele and other volunteers. Drennan (1980, p. 110) suggested that "Carefully trained volunteer... teachers are as productive as professional instructors." Finley (1987) identified several advantages to having volunteers teach in organizations and serve as organizational representatives in communities. He suggested that volunteers: (a) are most often individuals who talk the same language and share similar life experiences as clientele (including other volunteers); (b) speak with an authority that derives from their experience with utilizing the ideas they teach; (c) are usually respected within their communities, and their recommendations carry weight with clientele; (d) are perceived to be more easily accessible than professional educators; (e) volunteer to teach subject matter in which they are highly interested and, consequently, teach with enthusiasm; (f) are easier for some clientele to relate to than professionals; and (g) inspire confidence and self esteem in clientele.

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The educational partnership between volunteers, organizations and communities has enormous value not only to a specific organization and its clientele, but also to the individual volunteer and the community at large (Finley, 1987). Volunteers benefit organizations in that they extend the organization's outreach to a greater number of clientele. Volunteers generate enthusiasm and interest among clientele, and create a positive image for the organization by allowing it to provide immediate information and services to clientele about specific topics and needs. Volunteers relieve professionals of many time-consuming, individual requests for specific information and services, thus allowing professionals to pursue other organizational needs and objectives. Volunteers enable nonprofit organizations to address a larger number of needs and issues to a greater depth and with more continuity in these times of paid staff maintenance and/or cutbacks.

Organizational clientele benefit from volunteers in that more individuals are able to receive immediate information and/or services regarding specific subjects and needs. A greater number of clientele are able to develop skills and expertise regarding specific subject matter areas, and fulfill specific needs regarding particular issues, because of information and services delivered by volunteers.

The individual volunteer benefits by having the opportunity to pursue a personal interest and consequently gain personal satisfaction, learn new information, develop new skills, or enhance existing knowledge. Volunteers develop leadership and social skills as they interact with clientele and other volunteers. They develop personal pride and self-satisfaction as they help clients and gain status and satisfaction from becoming recognized service providers and experts in specific areas.

Finally, neighborhoods and communities benefit from the contributions of volunteers in that the services and information provided by volunteers help individuals and their families improve their homes, businesses, and neighborhoods. Greater citizen enthusiasm and rapport develop within communities when volunteers share their skills and enthusiasm for new information and practices, thus helping others and encouraging others to become interested in a subject. Furthermore, recognizing outstanding local volunteers can contribute to overall community pride.

EXPANDING VOLUNTEER ROLES AND SKILLS

Volunteers can function effectively as integral components of organizations. According to the American Red Cross (1990), they are considered central to the organization, not mere extensions of paid staff. Their jobs range from service and middle management to the highest echelons of leadership. "Paid and volunteer American Red Cross staff believe overwhelmingly that volunteers can handle any job—including managerial positions—if they have the necessary time and skills" (p. 13).

In order for volunteers to function successfully in middle management roles, they "need a chance to grow beyond their immediate job requirements and grow in both technical and interpersonal skills" (American Red Cross, 1990, p. 7). Yeager (1992) stated that "Volunteer managers often need to help groups make decisions. Boards need to set policy for volunteer involvement, staff need to direct the activities of organization, direct service volunteers need to decide how to carry out tasks, and clients need to indicate their preferences and concerns about services, often impacting the volunteer program" (p. 18). Adversely, "Less than satisfactory volunteer work occurs when ... staff or volunteers are: inadequately prepared ... do not understand how to work together; or do not respect each other's ideas" (U.S. Department of Agriculture, no date). Traditionally, volunteer training programs have focused upon specific subject matter, organizational, or interpersonal skills. However, volunteer training opportunities must include components that challenge volunteers to develop important processing skills.

Even more critical is appropriate, learner-focused and application-based training for those volunteers who themselves teach or train organizational clients or other volunteers. Jimmerson and Cordill (1994) concluded that volunteers who teach appear to be self-directed learners, with varying learning

styles yet who prefer being both actively involved in planning training sessions and actively engaged in the training itself. Macduff and Long (1993-1994) and Gaston (2000) proposed volunteer training approaches that involve active listening of volunteer participants and multiple ways for volunteer participants to process information into their own training designs.

Volunteer administrators and managers must challenge all volunteers, and especially volunteer middle managers, to critically analyze the choices facing them, reflect upon the possible outcomes of each choice, and then make a management decision based upon their best judgement. These are all components of critical thinking.

THE ROLE OF CRITICAL THINKING

Ennis (1985) defined critical thinking as "reflective and reasonable thinking that is focused on deciding what to believe or do" (p. 45). It is an essential element of problem solving, decision making, and evaluating one's position on issues. Critical thinking is not an esoteric mental operation but rather an essential component of everyday thought and deliberation.

Critical thinking is an internal dialogue consisting of such questions as "Do I agree with what is being said?", "Based on what I know, is the statement true?", "How do I really feel about what is being said?", or "What implications does this decision have for me and my future?" (Jones, 1989). It is the ability to see that problems may have many solutions, an alternative to making decisions by blind acceptance, impulse or whim, or simply "going along with the crowd. Critical thinking is exploring and imagining alternatives, and it involves developing insight into information and claims that bombard us. Duchesne (1996) investigated the importance of organizational leaders who "must continually make decisions, solve problems, and chart effective courses of action" (p. 1). In contemporary not-for-profit organizations, volunteer board and advisory committee members, direct-service volunteers who work with especially vulnerable populations, volunteer project coordinators, and any volunteer who functions without constant paid-staff supervision must have sufficient leadership abilities to enable them to make on-site and spur-of-the-moment decisions that are within the sponsoring organization's philosophy, mission, and policies.

To foster critical thinking in volunteers, non-profit organizational culture must: (a) Provide the opportunity for volunteers to consider the strengths and weaknesses of opposing points of view; (b) actively involve volunteers in evaluating alternative solutions to real-life issues and problems; (c) provide opportunities for them to reflect on, discuss, and evaluate personal beliefs and actions; (d) raise ethical questions about various consequences of actions and decisions; and (e) encourage dialogue among volunteers and administrators about contradictions in thoughts, words, and actions. Additionally, volunteer training environments must generate thought-provoking questions, with a focus on "how" and "why" as opposed to "what." The emphasis needs to be on developing problem-solving strategies rather than on conforming to the "right" answers. Romanish (1986) stated that learning environments "must be devoted to the opening of minds, or better yet, the prevention of their closing" (p. 47). As volunteer administrators, we must challenge volunteer middle managers to seek for their own "best answers" to the ethical situations facing them rather than prescribing our best answer to them. McVey (1995) concluded that "thinking is a matter of learning various task-specific thought processes. Critical thinking is the development of common sense—knowing what to do next" (p. 96).

INSTRUCTIONAL STRATEGIES THAT NURTURE CRITICAL THINKING

Many volunteer administrators and managers currently encourage critical thinking techniques and strategies among volunteers. However, some professionals perceive a need for further training in this area. For example, in Jones' (1989) study, a majority of responding home economists indicated that they could benefit from additional training and practice in effective use of critical thinking techniques.

There are numerous instructional strategies that volunteer administrators and managers may use that will foster critical thinking skills in volunteers, especially those who actively make management-type decisions on behalf of the sponsoring organization. Following are descriptions of selected strategies that are especially applicable to volunteer audiences, each with examples of contexts in which they are appropriate.

Critical Analysis

Critical analysis involves an individual volunteer (or small groups of volunteers) in critiquing material (e.g., items from the popular press) related to a specific topic or issue. For example, when investigating possible volunteer roles within a specific organization, a volunteer administrator or manager asks volunteers to read and critique articles from current newspapers and news magazines regarding current societal events and issues. Questions such as the following might be considered: "What are the most pressing needs facing American society?", "Which of these are also important to our immediate communities? Why? Which of these needs and issues are currently being addressed by our organization? How do they relate to our organization's mission?", "Which needs and issues not being addressed currently by our organization, should be addressed? Why?", or "How can volunteers help our organization better address these needs and issues?"

Debate Teams

Another effective instructional strategy is the use of debate teams. In this activity, volunteers are assigned to one of two opposing teams, one in support of a specific issue and the other opposed. Team members from each side present evidence and reasons in support of their team's position. For example, volunteers could debate the pros and cons of annual, mandatory training for all agency volunteers. What are the benefits of mandatory training? What are the drawbacks? This strategy is most effective if volunteers are asked to serve on a team whose position differs from their own.

Dramatization

Another type of strategy, dramatization, relies upon dialogue and action to assist volunteers in interpreting and analyzing situations. It differs from role playing in requiring a longer period of time and a holistic, well-developed plot. An example of dramatization involves staging and videotaping a meeting of an organization's board of directors, who volunteer their time and expertise as board members. The volunteer administrator or manager shows a video of a board meeting that deals with the issue of whether or not to provide supplemental personal liability insurance, paid for by the organization, for all volunteers. After viewing enough of the segment to develop a basic understanding of the situation, small groups of volunteers write the remainder of the script and then act out the alternative ending. Some groups might develop alternatives based upon the volunteer perspective while other groups base their endings on a board member or organizational perspective.

Action Maze

Action mazes provide excellent instructional formats for fostering decision-making skills in individuals. Volunteers are divided into groups consisting of two or three members. Each group is given a specific situation (or determines its own situation) as part of a larger issue to be explored. Each group member develops at least two responses to the situation and must identify the consequences of each alternative. The group's situation is described on a small piece of poster paper. Group members write each alternative response on the front sides of individual adhesive notes that are attached to the poster paper. These may be lifted to reveal the consequences of each individual response, which are written directly on the poster paper. When completed, the action mazes are exchanged among teams. Another team reads the first team's situation, chooses an alternative response, identifies its own consequences for that particular response, and then compares its consequences with those of the original group. As an example, a volunteer administrator or manager could develop an action

maze to help volunteers examine the issue of sexual harassment. Separate teams could address specific situations in which a volunteer believes he or she has been sexually harassed by an administrator or manager and (a) does nothing about it, (b) shares their concerns with another volunteer or a paid staff member, (c) confronts the individually directly, (d) initiates legal action against the individual and/or organization, and (e) quits with no explanation.

Critical Incident

The critical incident instructional strategy involves presenting the most dramatic or important part of a critical situation or issue to a group of volunteers, who must then resolve the situation or issue. The facilitator has complete information about the situation but shares it only in response to direct questions from the volunteers. After the volunteers share their solutions, the facilitator points out pertinent points the volunteers may have overlooked. The critical incident strategy emphasizes the importance of gathering complete information before making decisions. As an example, a discussion concerning a volunteer who disagrees with an organizational policy that they believe is ethically wrong could focus on the critical incident presented by an administrator who tells the volunteer, "Either you follow our policy or you'll be dismissed." Or consider a volunteer who tells a client, "I don't care that you got stuck in traffic. You weren't here on time, so you'll have to reschedule."

Scenario Building

In this strategy, volunteers develop a detailed written description of a specified situation. The volunteer administrator or manager provides them with questions to address as they build their scenarios and guides them in setting goals and determining strategies. For example, a facilitator may develop a scenario involving an administrator who has decided to replace a long-term volunteer serving in a specific capacity with a new volunteer. Volunteers could consider such questions as "Whose decision is it?", "How does this make me feel towards the organization?", "Do I agree with this decision? Why, or why not?", and "How does this make me feel about myself as a person and not just a volunteer?"

Socratic Questioning

This strategy involves the use of the "right" questions, as opposed to questions that tend to bring closure to volunteers' thinking by simply requiring a "yes" or no" answer or by asking volunteers to repeat information they have received. Such questions require only recall, not the processing or synthesis of information. In contrast, Socratic questioning can facilitate the exchange of ideas and viewpoints, give new meaning to content, explore applications to problems, and provide implications for real-life situations. The following are illustrations of Socratic questions: "If this situation would happen to you, what would you do?" "That's one possible approach to the issue; can you think of another possible approach?"; "What impact will that decision have on your decision to volunteer?"; and "Why did you come up with that solution to this problem?"

Creative Visualization

Using this strategy, volunteers are asked to think ahead to a situation in which they might at some point find themselves. With volunteers' eyes closed and bodies relaxed, the facilitator helps them create a mental image of the situation, setting the stage by asking questions that create a visual picture of the situation and the accompanying emotions. Creative visualization could be employed by asking volunteers to imagine themselves as the administrator or manager of the volunteer program. The volunteers are asked to visualize the answers to questions such as, "Who influences the decisions you make?", "How do you spend a normal day?", "How do you better motivate the volunteers in your program?", and "How do you help individual volunteers resolve conflicts among themselves?" The same process could be used to have volunteers visualize what it would be like to be a client of the organization. Are they satisfied with the services they receive? What would they like to see volunteers do

differently? If asked, would they pay for the volunteer services they've received?

Listening Teams

In this instructional strategy, the administrator or manager divides volunteers into several listening teams prior to a presentation or panel discussion on an issue. Each team is assigned a specific listening task. At the conclusion of the presentation, each team asks questions or presents reactions related to the task for which it was responsible. As an example, suppose that the group is listening to an individual who is a well-known volunteer expert. The audience can be divided into three listening groups: one that listens for the feelings that the speaker communicates, another that focuses on the factual information the speaker presents, and a third that identifies any advice that the speaker conveys or implies.

Journal Writing

In this strategy, volunteers are asked to keep a journal or diary between training sessions to encourage them to reflect on personal actions and behaviors that relate to the program topic. For example, as part of teaching interpersonal skills, a volunteer administrator or manager could ask volunteers to keep a journal in which they record conflicts they have observed or experienced, how the conflict was addressed, and their personal feelings regarding the outcome.

Quotations or Cartoons

Here, a facilitator uses quotations and cartoons to encourage critical thinking and questioning among volunteers. The material could be displayed in the training location for volunteers to read during breaks, or it could be included in mailings and newsletters. Group discussion increases the effectiveness of this strategy and can be initiated by such questions as, "What do you think this quote means?", "What does this cartoon say to you?", or "How does this cartoon relate to your personal life?" A volunteer administrator or manager could develop a resource file of "Calvin and Hobbes" or "The Far Side" cartoons, for example, which could help volunteers explore the challenges of accepting responsibility, dealing with organizational change, or working with difficult people. Quotes from historical figures could serve as an effective strategy to stimulate discussion and encourage sharing of opinions, such as Robert Kennedy's "Some men see things as they are and say 'why'...I dream of things that never were and ask 'why not?'".

Inventing

With this strategy, the facilitator asks volunteers to invent new products or services and to describe their attributes. Volunteers may work individually or in small groups to develop their ideas. For example, as part of improving volunteer retention, they might invent new ways to recognize volunteers for their contributions. Or, a group of volunteers discussing their respective roles and responsibilities could be asked to invent the "perfect" volunteer position and explain why they incorporated specific characteristics into the design of their new "product."

Pluses, Minuses, and Implications

One way to analyze various alternative solutions to a situation is to identify the pluses, minuses, and implications (PMI) of each alternative. Volunteers may work individually or in small groups. The analysis involves listing and discussing the aspects of a particular decision for an individual, group, or entire community. When possible, the facilitator may lead the entire group in discussing the highlights of small-group discussions. Using the PMI strategy, volunteers can discuss the pluses, minuses, and implications of numerous volunteer organization-related critical decisions they might face, such as whether or not the organization should expand it's outreach into new communities or initiate a new program, or whether an individual should continue as a volunteer or leave the organization.

SUMMARY

According to the Points of Light Foundation (1992, June):

> *Today, as our nation faces complex and growing social problems, we need the time and talent of every American committed to building healthier, safer, more just communities. Most importantly, we need to give renewed priority to finding ways in which each of us, working individually and collectively as volunteers, can help address serious social problems. (p. 1)*

Volunteers must not be considered merely a means to an end in contemporary nonprofit organizations. As volunteer administrators, we must recognize, engage, and value each individual volunteer's diverse and unique assets and contributions to our programs and to our communities. Volunteers who have been encouraged to develop critical thinking skills will be better prepared to address the complex issues we face today and the future challenges of tomorrow. Nurturing critical thinking skills in volunteers is a "value-added" approach to volunteer development that results in sustained, meaningful volunteer empowerment rather than mere ongoing volunteer management.

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Partners in Caring: Administration of a Hospital-based Volunteer Program for the Education and Support of Cancer Patients

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INTRODUCTION

Volunteerism is a fertile field for research (Ellis, 1985; Independent Sector, 2002; Institute for Volunteering Research, 1997; Hall et al., 2001), and investigating relevant issues is not only of academic interest, it is also immediately useful to practitioners in volunteer programs. The purpose of this paper is to highlight significant administrative issues within the volunteer program of the Patient Education Program in Princess Margaret Hospital (PMH), a comprehensive care oncology hospital within the University Health Network (UHN) located in Toronto, Canada. PMH has created a highly useful and successful volunteer system for patient education (PE), in which volunteers can make an effective and personally fulfilling contribution to the education and support of patients and their families. Such volunteer activities can be crucial in empowering those dealing with cancer (see also Fusco-Karman and Tamburini, 1994; Fusco-Karmann et al., 1996; Edgar et al., 1996; Halmay et al. 1995; Hoare and Peters, 1996; Jimenez and Jimenez, 1990; Chevrier, et al., 1994).

Administrative support is an essential component of any program development effort (Diamond, 1989), and volunteer administration is a crucial and continually evolving component of our PE program. A variety of volunteer administration models exist (Culp, et al., 1998), and our administrative model of volunteer recruitment, training and support is presented here, with the understanding that the strategies and principles that we have developed are transferable to other situations, including those beyond healthcare. While we recognize that no one formula exists for a volunteer program, we describe our model for the management and use of volunteers for PE in our context in the hope that others will benefit from our understandings and programs.

What follows is a discussion of the key points we identified as important in our developing PE program. We describe the PE program at PMH and the role of volunteers in its success. We then detail the formalized volunteer management systems and procedures in our program. Specifically, we consider the role of the Director of Patient Education, the necessity of collaboration in the development, and design of our volunteer curriculum, and finally issues around volunteer motivation, satisfaction, support and recognition.

THE PMH PATIENT EDUCATION PROGRAM

PMH has initiated a volunteer supported, computer-based PE program (Jones et al., 2001) that aims to empower those dealing with cancer by providing consistent, compre-

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hensive and evidence-based medical information and support. This is done via an interactive Intranet Web Site containing information about cancer (the Oncology InteractiveTM Education Series), library resources, Internet links, information about PMH services, and a hospital calendar of events.

In total, 17 Patient and Family Resource Centers have been established within cancer site-based waiting areas throughout PMH to provide appealing and easy access to the Web site. Each Resource Center is clearly visible and easily accessible to patients and families waiting for healthcare appointments. Trained PMH Resource Center volunteers provide computer assistance, manage resources, and support patients and their families in a manner that demonstrates compassion, respect and empathy.

To date, 45 volunteers have been recruited and trained from the hospital pool of volunteers to assist users of each Patient and Family Resource Center. The majority are women (79%). Their average age is 44 years, and 79% are presently attending or have completed university. PMH serves a large multicultural community (close to half of Toronto residents speak a mother tongue other than English) and our volunteers reflect the diverse cultural and linguistic backgrounds of our surroundings; 47% were born in a country other than Canada, and 50% speak a language other than English in their household. We assume that personal assistance by volunteers increases the likelihood that a learning experience will be both memorable and supportive for patients and their families. The primary goals of our volunteer support program are to: (1) empower patients and families dealing with cancer, (2) improve patient and family education at PMH, (3) exert a positive effect on the hospital environment, and (4) better the hospital experience for patients and their families.

ADMINISTRATION OF PATIENT EDUCATION VOLUNTEERS

The formalized structure of the volunteer program is exemplary of a wave of professionalization of volunteer administration that began in the latter part of the 20th century (Ellis and Noyes, 1990; Institute for Volunteering Research, 1997) in response to the demands of both volunteers and organizations. Formalized management systems and procedures in our program include:

- A designated Director of Patient Education to identify needs and develop the volunteer training program and management strategies
- A hospital-wide Department of Volunteer Resources that assists in volunteer orientation and management.
- A formalized agreement with the Departments of Volunteer Resources and Psychosocial Oncology and Wellspring (a community organization) for volunteer training.
- Written volunteer policy/practice and procedures handbook for the hospital and patient education programs.
- Systems for ongoing support and supervision of volunteers that include moving volunteers to new tasks and counseling volunteers.
- Procedures for evaluating volunteer work, managing staff/volunteer relationships and recognizing volunteer contributions.

Many difficulties in creating, managing and costing a volunteer-driven program in PE can be circumvented by giving a single individual overall responsibility for the program (Goodlad and McIvor, 1998; Ellis, 1985). Part of the administrative role of Director of Patient Education at PMH encompasses the design, implementation, management, and evaluation of the volunteer program to achieve organizational goals. Administrative volunteer program functions of this position in PMH include (see also Ross and Brudney, 1998):

- Establishing a rationale for volunteer participation
- Integrating the patient education volunteer program into the Department of Volunteer Resources and the hospital infrastructure
- Preparing job descriptions for volunteer positions
- Developing volunteer training curriculum
- Applicant interviewing and screening for volunteer positions

- Meeting the needs of volunteers by placing them in productive and satisfying jobs
- Training volunteers
- Monitoring, evaluating, and recognizing volunteer performance
- Acting as an advocate for volunteer needs and interests
- Recruiting and training staff to work with volunteers (e.g., Resource Center Coordinator and Administrative Staff)
- Responding to problems, mediating conflicts among volunteers, and handling release of volunteers.

The Director of Patient Education takes personal responsibility for day-to-day decision making, maintaining program momentum and encouraging effective communication among stakeholders in the hospital.

In order to be successful, a volunteer program must be compatible with the hospital's organizational culture, and an integral part of that culture (Silver, 1988). Therefore, an important initial task for the Director of Patient Education has been to understand the organizational culture at PMH, and integrate the PE program within it. Necessary skills for the position include a good understanding of our patient audience, strong interpersonal skills, and the ability to inspire and motivate others and defuse conflict. Establishing and maintaining the conditions in which communication can occur are important facets of the role.

As a liaison between the organizational, volunteer and patient groups, the director functions to bring the different cultures together in as effective a way as possible to meet the educational needs of patients and their families, and to enhance hospital performance.

For example, hospital departments in our large organization tend to operate independently, often resulting in a sense of isolation for educators, duplication of service and inefficient use of resources. The Patient Education Director identified common objectives within various clinical programs; established hospital-wide programs, such as a centralized pamphlet development and distribution system; formed a Patient Education Advisory Committee to foster networking and collaboration among our stakeholders; and articulated how skilled volunteers could provide a supportive response to patient education needs.

Clearly, this is in great part a political role that requires familiarity with and networking within all hospital departments involved with patients in order to make the various groups aware of shared objectives, values and problems. Organizing a hospital-wide program for the education of patients and their families requires tremendous commitment, energy, and enthusiasm from all levels of hospital administration.

VOLUNTEER TRAINING: A COLLABORATIVE EFFORT

In a strong collaborative effort, the PMH departments of Psychosocial Oncology, Volunteer Resources, and Patient Education, and Wellspring (a community organization with an expertise in peer support training) all partnered in the development of this volunteer-assisted initiative. Given that volunteer "good will" must be integrated with competence (Fusco-Karmann et al., 1996), a comprehensive volunteer training program has been designed to provide volunteers with the technical and psychosocial skills necessary to support users in each Resource Center. Specialized training allows the volunteers to work at their highest levels of expertise, and is also a form of acknowledgement of the importance the hospital places on volunteers. Their input is worthy of the investment of substantial time, energy and resources on the part of staff at PMH.

DEPARTMENT OF VOLUNTEER RESOURCES

An understanding of the overall focus and concerns of the hospital is an essential starting point of the training process (see also Fusco-Karmann et al., 1996). Therefore, prospective volunteers must attend an information session hosted by the Department of Volunteer Resources in order to be considered by programs/services in support of PMH patients, families and staff. The UHN Volunteer Opinion Survey (VOS, 2002) indicates that what

volunteers value most is information to help them perform their volunteering duties. Orientation sessions allow questions to be posed and answered and for provision of background information about the hospital.

Newly recruited volunteers are provided with a Volunteer Resources Handbook welcoming them and outlining the hospital's goals, guiding principles and values. The handbook also explains the volunteer code of ethics, as well as infection control, safety and security and emergency procedures. Through the written materials, volunteers learn about communication, confidentiality and dealing effectively with the public. Administrative guidelines clearly lay out performance expectations, and the benefits of volunteering. For example, expectations about scheduling, absences, vacations, volunteer sign in/out, dress codes and resignation procedures are clearly explained. All volunteers are bound by a code of ethics and a signed confidentiality agreement.

MOTIVATION AND SATISFACTION

What motivates volunteers, and why they find satisfaction in their efforts, have implications for recruitment, selection and administration of a volunteer program (Chevrier, et al., 1994). According to a recent Canadian survey (Hall et al., 2001), the top four reasons Canadians gave for volunteering were: (1) believing in cause supported by the organization (95%); (2) using skills and experience (81%); (3) being personally affected by the cause the organization supports (69%); and (4) exploring one's own strengths (57%). Similarly, a UK survey (Institute for Volunteering Research, 1997) found that people volunteered for a mix of altruistic and self-interested reasons, including meeting one's own needs and those of family and friends, responding to a community need and learning new skills. Key personal benefits were; enjoyment of the activity; satisfaction at seeing results; meeting people; and a sense of personal achievement. The UHN Volunteer Opinion Survey (VOS, 2002) indicates that the most important things contributing to volunteer satisfaction are helping patients, families and employees; recognition, respect and appreciation; growth in role, skill development; making a difference; and other, namely "giving back", working with a good team, and communications.

Volunteers potentially receive many intangible benefits in exchange for their gifts of time and effort. Understanding what inspires and hinders people's contributions can provide volunteer supported programs with valuable insights (Hall, et al., 2001) and promote structures that assure that those benefits are attained (Manninen, 1991). In other words, from a programmatic perspective, "reciprocity is required—efficient and effective service in exchange for some form of benefit" (Goodlad and McIvor, 1998). Measuring the subjective dimensions of volunteering (e.g., through informal conversations, targeted interviews and focus groups) is an important part of our continuing program evaluation efforts.

JOB DESCRIPTION AND VOLUNTEER SATISFACTION

A critical part of early program development has been the development of a clear profile of the patient education volunteer who will be compatible with the tasks to be done (Silver, 1988). Persons who express interest in volunteering for the Patient and Family Resource Centers are provided with position descriptions (Appendix 1) that identify: the general and specific program objectives; the desirable skill-set; program training components; commitment expectations; duties and related tasks; and the rewards of becoming a Resource Center Volunteer. The posted job announcements and descriptions contain a clear description of the tasks to be accomplished as well as the personality styles, attributes, and beliefs necessary to succeed in our setting.

Having volunteer expectations match the responsibilities of the position is an important component of volunteer satisfaction. Our UHN Volunteer Opinion Survey (VOS, 2002) concludes that volunteers consider role definition to be a key issue. The survey indicated that:

- It was most important for volunteers to have a clearly defined role.
- Volunteers are most concerned about the degree to which they are utilized within their placement area.

- Volunteers are very concerned about having meaningful activities and tasks to perform.

In the United Kingdom, 7 out of 10 volunteers report dissatisfaction with the way their volunteer work is organized (Institute for Volunteering Research, 1997), citing the top four drawbacks of volunteering as follows: things could be much better organized; you sometimes get bored or lose interest; you cannot always cope with the things you are asked to do; you do not get asked to do the things you would like to do. Clear job descriptions can minimize these types of concerns.

In our setting, the written job description has proved to be a good foundation for successful selection and placement of our volunteers (see also Gale, 1997). Similarly, the policies and procedures developed earlier by Volunteer Resources have also established the standards for knowledge and behaviour for the volunteers, and ensured that staff and volunteers alike understand their responsibilities. Together, the patient education job description, and the broader hospital policies, and procedures for volunteers serve a useful role as early orientation and training tools for volunteers.

VOLUNTEER TRAINING: CURRICULUM DESIGN ISSUES

During the pilot phase of the PMH Computer-based Education Program, 25 volunteers were recruited by the Department of Volunteer Resources. Following an interview and orientation by volunteer resources, interested candidates were screened by the Education Department. As candidates advanced through the screening process they were invited to participate in the computer-based PE Volunteer Training Program. Volunteers not selected were redirected to Volunteer Resources for other assignments

A comprehensive volunteer training curriculum was designed to provide volunteers with the technical and psychosocial skills necessary to support cancer patients and their families in each Resource Center. Since volunteers do not work as many hours as regular staff, training is especially important to facilitate their integration into the hospital system. The specific goals of the training program were to impart knowledge, and develop skills and positive attitudes for the provision of information and support to patients and their families. The curriculum was developed in collaboration with Wellspring, a community agency, and experienced facilitators implemented the program.

Volunteers receive a comprehensive, easy-to-read, training manual, a full day of psychosocial training, a half-day of resource management instruction, a half-day of computer training and nine hours of self-directed computer practice. Strong emphasis is placed on each volunteer's individual learning efforts and motivation to learn, and ample time is provided for self-directed learning with the multimedia material. Written self-test exercises are given to volunteers, enabling them to assess their progress through the computer training. Volunteers are instructed on how to provide computer assistance to users, manage resources, and support patients in a manner that demonstrates respect, compassion and empathy. All forms of training strive to emphasize the importance of relating the hospital experience to the everyday life of both the patient and the volunteer. To date 45 volunteers have been trained.

The formal PE training and accompanying manual/materials clarify what we expect of volunteers, and orient them to their immediate work situation. We are currently developing ongoing training initiatives (continuing education) in order to retain and challenge our outstanding volunteers. Such "maintenance-of-effort training" is an investment to build volunteer satisfaction, morale, and commitment (Bolon, 1995). Several "senior" volunteers have also become managers, sitting on administrative bodies such as the Patient Education Advisory Committee and adding their expertise to hospital deliberations.

Training provides volunteers with the information, skills, and practice they need to carry out their work with oncology patients. It promotes an understanding and appreciation of the important subtleties of working with specific kinds of cancer patients. For

example, an important component of the volunteer role is to support hopefulness and positive energy in patients (Jimenez, and Jimenez, 1990). "Hands-on" psychosocial training through role-play enhances that ability, while simultaneously screening out those individuals who, for a variety of reasons may not be suitable to carry out this role. Former cancer patients who are still too close to their own illness experiences to deal objectively with those of others, and those who exhibit difficulties during small group experiences may be reassigned to other duties in the hospital. Training is, in effect, part of our screening process.

Clearly, this PE program is very labour intensive and volunteers play a key role in supplementing and complementing the work of our paid staff. Although volunteering can be cost-effective, our training program illustrates that it is not cost free (see also Dingle et al., 2001). Volunteers need the same investment as paid staff (Manninen, 1991). Determining the extent of this investment has involved calculating the number of volunteers and hours that are needed, reassessing this as the program evolves, calculating overhead costs for staff, supplies, and training, and deciding from where funding is to come.

SUPPORT AND RECOGNITION FOR VOLUNTEERS

In our experience the impact of the volunteers on the quality of life of patients and their families can be profound, and that positive impact should be rewarded and celebrated. UHN volunteers (VOS, 2002) have indicated that on average, they prefer regular recognition, rather than formal recognition events, and that they wish to receive regular feedback on their performance from their placement area. Volunteers also need opportunities to network with each other, and to share their challenges, excitement, and feelings of helplessness or anxiety. They need opportunities to support each other, reflect on their experiences, and establish connections between themselves (Katz, 1998). This may take the form of regular meetings and buddy systems (Jimenez & Jimenez, 1990).

We have chosen the administrative route of individual supervision on an as needed basis, group supervision sessions, debriefing meetings, and celebrations to recognize the accomplishments and time commitments of volunteers. For example, in 2001, a day-long celebration of volunteer participation was held in the newly launched Patient and Family Library and satellite Resources Centers. The Patient Education Volunteers themselves facilitated an open house to orient hospital staff and other volunteers to the patient education program. Informal recognition is also a priority, and volunteers receive regular feedback about their important roles in the patient education team. Last year books in the library were dedicated and inscribed with a commemorative certificate in the name of each volunteer.

In addition, the hospital's Department of Volunteer Resources plays a central role in recognizing the contribution of volunteers. Among other UHN events, they host a summer youth recognition event; the annual fall recognition event for all volunteers; and an educational symposium for all volunteers. Recognition lunches, celebrations, etc. recognize the contribution of volunteers, and promote a sense of belonging and accomplishment that motivates people to continue volunteering their time and energy.

SUMMARY

We have found volunteers to be key to effective and efficient technology and resource utilization by many of our patients and their families. Effective professional development of volunteers is essential to help improve patient learning, and raises the question of what hospitals and other organizations can do to better prepare and maintain a high quality and technologically literate volunteer service. In this paper we have examined the principles of good practice and administrative procedures that we have found necessary for the task of selecting, managing and training PE volunteers in an oncology hospital setting. We identified key issues that will likely need to be addressed by other practitioners and policy makers in similar programs, such as those dealing with another chronic disease. For example, new programs need to be aware

of the key role of the program director in collaborating with diverse groups within and beyond the hospital to develop an effective program, train and manage volunteers, and maintain volunteer motivation and satisfaction.

Our program development efforts indicate that volunteers involved in any computer-based learning program must receive the administrative support and training they need to integrate technology-based tools into their patient support efforts or they will ignore the technology we are implementing or simply view it as a source of ongoing frustration. In addition to a well-designed training program, such support involves continuing opportunities for professional development, practice/learning time, ample feedback about performance, staff assistance for problems and concerns, and peer communication (i.e., conversations and debriefings) to promote best practices and content skills. Our ongoing program evaluation efforts are examining how volunteers increase the depth and breadth of information and support available to patients and their families. A future paper will share how volunteer assistance is augmenting the services of paid hospital staff.

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APPENDIX 1

Partial position description for a Patient Education Volunteer at Princess Margaret Hospital.

Placement Description: Patient and Family Resource Centres are 14 site-based satellite libraries. These settings will provide patients with opportunities for multimedia Oncology Education. These resources will facilitate a process that supports the objective of Patient Education for PMH.

Patient Contact: HIGH

Purpose: Coming to PMH for cancer treatment is a stressful and often frightening time for patients and families. It is the role of the volunteer to create a supportive, comfortable, non-threatening and responsive environment for patients and family members by:

- Providing access to and support utilizing the materials and tools available in the Resource Centres
- Directing patients and families to resources available in the hospital and in the community
- Offering informal and friendly support to patients and their families.

Commitment: Minimum commitment of 4 months; one three or four hour shift per week (9am to 12pm; 1pm to 4pm) Monday to Friday.

Qualifications:

- Ability to show respect and understanding for individuals, their age, culture, beliefs and their impairments
- Exceptional people skills—patience, empathy, active listener
- Ability to work autonomously
- Excellent organizational skills
- A willingness to learn basic skills related to library and computers
- Mature and responsible
- Second language is an asset.

Duties and Related Tasks:

- Greet patients and introduce them to the resources available
- Explain the process of borrowing resources from the resource centre
- Guide patients through the procedures for using the computer
- Identify hospital and community resources available to patients and their families
- Offer active listening, friendly support and guidance
- Provide feedback to patient education staff of any issues that may arise.
- Supervise and maintain resources:
- Follow check out procedures
- Keep books and videos in order
- Track pamphlet quantities and request more as needed
- Do not leave resources unattended.

Benefits/Satisfaction of this Position: Excellent opportunity for a volunteer who likes to work directly with patients and their families. Volunteers are active participants in supporting patients and their families in the process of information empowerment and in coping with their diagnosis of cancer. This placement is an excellent opportunity to further develop interpersonal skills and to develop library and computer skills. The volunteer is a valued member of a unique interdisciplinary team with a multimedia approach to patient education.

Vision to Reality: A New Future for Volunteer Administration in Minnesota

Judie Russell and Carol Thompson

In 2001, voluntary service in the United States reached an estimated $239 billion, according to the Independent Sector. Without this vital asset, services offered by non-profits, government and educational institutions would be profoundly diminished. Yet those who mobilize this tremendous resource often lack credibility. Simply put, volunteer administration is not seen as a real profession.

Professional associations have long been recognized as strategic to professionalism. In Minnesota, until recently some 40 networks connected those who managed voluntary effort. This led to fragmentation, duplication of effort, competition for leadership, and most importantly, no common voice. Something needed to change.

In 1997, a small group of dedicated leaders drafted a vision called "*Volunteer Leadership 2000.*" The goal was to take the profession to a higher level of development, visibility and credibility by creating one statewide professional association to speak with a powerful voice for and about volunteerism in the state of Minnesota.

FROM VISION TO REALITY

What does it take to unite geographically and philosophically diverse networks? Fascinating and frustrating, the process used in Minnesota was a gradual distilling of ideas and a grand exercise in soul searching. *What were volunteer administrators both willing to give and to give up?* We have summarized here the steps taken and lessons learned, so that others may learn from our struggles and successes.

Bring all the players to the table. We launched the process by bringing together representatives of over 30 networks and affiliated organizations, including the Minnesota Office of Citizenship and Volunteer Services (MOCVS) and the Upper Midwest Volunteer Action Centers. Our goals were to identify barriers, build consensus, and identify leadership.

The process of getting agreement from disparate and often unempowered groups across a large geographic area is difficult and complex. We looked for ways to move members of all networks toward consensus. An early key step was seeking written commitment. Sixteen networks pledged to work together by signing a "Letter of Intent."

Build committed and sustained leadership. It took three years from the beginning of the planning process until the new association was launched. It is difficult to sustain enthusiasm and intense engagement for such an extended period of time. Aim for two years maximum.

The enormity and complexity of this project called for a high level of commitment and a firm pledge to see it through. A core group of planners emerged to form the Executive Planning Team of Volunteer Leadership 2000. Many people worked long and hard over the years, but two key leaders emerged and committed to stay the course. Turnover on the planning team proved disruptive and difficult to manage, so this consistency was critical to the ultimate success of the project.

Judie Russell, Director of Volunteer Services for Children's Home Society of Minnesota, is a Licensed Social Worker and has over 30 years of professional experience in Human Services. Russell has served as a member of the Board of Directors of the Volunteer Center in St. Paul, as co-chair of the Advisory Council for the United Way of Minneapolis Volunteer Center, as a consultant and trainer in Volunteer Administration, and as past president of the Minnesota Association of Volunteer Directors. She is a frequent presenter at state and national conferences and facilitated the Volunteer Leadership 2000 process.

Carol Thompson has worked in leadership roles in volunteer management for more than 20 years. She directed the volunteer program at Planned Parenthood of MN/SD when it received the Planned Parenthood Federation of America 1998 Affiliate Excellence Award. She was a charter member of the Planned Parenthood Network of Volunteer Advocates Steering Committee and recently chaired a sector-specific network within MAVA known as Administrators of Healthcare Volunteers (AHV). Thompson served in a leadership capacity with the Volunteer Leadership 2000 process for over three years.

Articulate the vision. Early in the process the team developed the essential building blocks for the new association: mission, vision, values and guiding principles. Agreement around these vital elements built consensus and excitement. In naming the association, planners sought to avoid duplication and to be inclusive. The name, Minnesota Association for Volunteer Administration (MAVA), emerged and provided a link to international identity through AVA.

Design it. Planners struggled with two critical challenges:

- Accommodating the interests of sector-specific and geographically-based networks.
- Achieving the necessary mass to become one large, strong statewide association.

MAVA emerged as an umbrella organization to bring together smaller networks. It has one governing body. Individual members join MAVA and may opt to join affiliated networks of their choice. Since all central functions are handled by MAVA, the structure of the networks has been greatly simplified, virtually eliminating competition for leadership.

MAVA sought ways to enhance networking opportunities while offering the benefits of a larger and stronger association. MAVA holds quarterly meetings with top-notch educational presentations, networking, and a business meeting and the networks within MAVA may, if they wish, hold additional events.

Articulate the member benefits. Defining member benefits proved to be a classic "chicken and egg" dilemma. Potential member networks asked, "What will we get for our money?" while the planning team asked "What benefits do you want and need?" While MAVA would offer typical member benefits of any professional association, the planning team continued to stress the overarching benefits:

- One strong statewide association to speak with a common voice
- More effective use of human and financial resources
- Enhanced professional development, and visibility and credibility for the profession.

Another important and new benefit was a part-time executive director, a bold new step in Minnesota for an association representing volunteer administrators.

Communicate, communicate, communicate. The planning team developed consistent messages, clear and powerful, to help others understand the vision. For example:

- A series of short progress reports distributed statewide
- An information packet to answer questions, explain why the new association was needed, how it would be structured and how to join
- A PowerPoint presentation delivered around the state.

We cannot emphasize enough the need for good, clear communication to create buy-in. Address skepticism and build trust with face to face communication whenever possible. Be prepared to answer tough questions. How will you finance this venture? Won't my network lose its identify? How many sets of mailing labels will we get? All questions, big and small, were welcomed.

Get down to brass tacks. Operational planning was a multifaceted task. Decisions were numerous and complex.

- *What would it take to change many networks and associations into one alliance?*
- *Would any of the networks dissolve?*
- *Would any retain an identity?*
- *What legal steps would it take to construct this new alliance?*

While busy trying to sell the concept, the planning team also orchestrated the necessary operational planning:

- Developing by-laws
- Facilitating discussion with legal counsel
- Securing start-up funding
- Guiding networks with resolutions to join
- Hiring an executive director
- Recruiting the first board of directors
- Planning a kick-off event

Transition to the new association. Moving from the old to the new was complex and required legal counsel. To save time and money, a plan emerged to use the existing 501(c)(3) IRS designation of the Minnesota Association for Volunteer Directors (MAVD), one of the older statewide associations, as the legal foundation. MAVD changed its name to the Minnesota Association for Volunteer Administration, accepted the resignation of its board of directors, and voted in a new board representative of the new member groups.

Simultaneously, individual networks needed to make a decision: *Continue as a small network with little impact, or join the new alliance and contribute to a strong professional association.* At last, four of the largest and strongest associations voted to form the new alliance. These included:

- Minnesota Association for Volunteer Directors
- Corporate Volunteer Council
- Minnesota Council of Directors of Health Care Volunteers
- Directors of Church Volunteer Ministries

Three additional geographically based networks also joined.

Keep the faith. Various obstacles surfaced periodically. There was concern about loss of identity and reluctance to commit too quickly to a new idea. Many adopted a "wait and see" approach, a direct threat to the success of the new association since a minimum critical membership mass was needed for the association to survive financially. Many objected to the $50 annual membership dues, a clear indication that they saw their daily occupation as a job, not as a profession.

Participants in the process changed as individual lives and jobs changed. For others, multiple demands interfered with sustained effort. To the planning team, it often seemed like taking two steps forward, then one back. Re-education around the vision was continuous. Affirmation of leadership was critical. A fervent belief in the value of creating one strong statewide association sustained the planning team and moved it to success.

Celebrate and launch. Three years of activity culminated in a kick-off event in November 2001. Susan Ellis, president of Energize, Inc., joined the celebration as keynote speaker. Our dream was realized as over 400 professionals across the state became members of the new alliance!

By the end of 2001 the vision of Volunteer Leadership 2000 was achieved. Minnesota had developed a new model for a new century.

EVALUATING THE FIRST YEAR OF OPERATION

Since the launch of MAVA, events occurred in Minnesota that showed us how timely the vision was. Six weeks after the launch, the Minnesota Office of Citizenship and Volunteer Services was cut from the governor's budget. Volunteer directors lost an important resource and the new association, housed in the MOCVS office, even lost its office space.

Resources to volunteer centers have eroded, services are diminished, and some have closed. More recently, nonprofits face major cuts in government funding and reduced revenues from many other sources. Jobs are disappearing, and those who stay are asked to do more with less. More than ever, it is a time when professionals in this field need representation. A strong statewide association has never been more important.

It is timely to reflect not only on how the association was formed, but also on what lies ahead. *What does the future look like?*

Funding: A planning grant and subsequent implementation grant provided an initial financial base, but funding remains a concern and a critical issue. Income from membership at or near its current level will not be sufficient to support the work of the association. Funding partners have emerged in our state's Learn and Serve, for joint statewide workshops, and the Bremer Foundation, to connect and build capacity in greater Minnesota.

Membership: Building MAVA membership to twice or three times its current level must take priority. We need to learn what

various constituencies want and need, and find ways to meet those needs. All must be part of this alliance. As other networks face the dilemma of continually shrinking resources, joining MAVA will become a more attractive option.

Professional education: Professional education is a key benefit. Our first year was very successful with over 200 in attendance at each of four educational sessions, but members in remote parts of Minnesota cannot always attend. Technology will help. Our Web site (www.mavanetwork.org) is up and running, with biweekly updates. A "Traveling Trainer" model is being explored, with members as presenters.

Advocacy: Creating a common voice was a critical goal of the new alliance. Finding a way to carry that out is more difficult. The alliance has created key messages, defined an advocacy plan, and has partnered with the Minnesota Council of Non-Profits and others. Initiatives include training members to speak out internally and externally. An active committee is poised to respond when opportunity arises.

Governance: The initial board was charged with building a foundation for the new association and implementing start-up activities. Focusing on the big picture during the first year was a challenge. Building working relationships at the board level and learning to work with an executive director were also challenges. An active Nominations Committee to develop future leaders is critical.

Strategic Planning: One would think that, given the newness of this association, strategic planning might be less critical. Nothing could be farther from our actual experience. Since the kick-off, changes in the climate in which we work have been profound. We must continue to focus on how we fit and identify opportunities that will benefit us. We have used every opportunity to seek input from members, including conducting a facilitated strategic planning session with board members, past and present, and community partners. Focus groups are being planned to collect critical information about needs and resources in greater Minnesota.

2003 AND BEYOND

MAVA has created a sense of cohesiveness, of shared leadership and of hope for impacting concerns, but there is still much to be done. While pooling leadership and resources seems to be an ideal direction in these difficult times, participation must be statewide and all must benefit. Our hope is that with continued hard work, the Minnesota Association for Volunteer Administration will grow in size and strength. We have a strong vision and passion for the future. We intend to be an effective voice for the critical role volunteer administration plays in successful citizen participation in the state of Minnesota.

Creating a Statewide Virtual Network

Meghan Kaskoun

As we work to build credibility, and strengthen our voice as professional managers of volunteers, there is increasing interest in creating statewide professional associations that share resources and encourage professional growth and development.

Have you ever attended training in your city, and found that it just didn't meet your needs? Wouldn't it be great if you knew of another session that is more focused to your specific needs that you could attend at member discount? Wouldn't you like to collaborate with other colleagues who are working under the same governing laws, to strengthen volunteer administration in your state? But how do you do that without driving all over the state, and adding to an ever increasing list of tasks "to do"?

The Ohio Network of Volunteer Administrations (ONVA) was an idea proposed by two leaders in our field, Mary Merrill, President of Merrill Associates and R. Dale Safrit, Ed.D., currently Associate Professor & Extension Specialist, Department of 4-H Youth Development, North Carolina State University. Noticing strong areas of representation in volunteer administration in the larger cities, yet under-representation in rural areas, their idea was to nurture professionals by creating an online forum to exchange ideas and collaborate on training throughout the state of Ohio. To do this, however, they needed help.

They created an outline of their idea and approached two existing statewide entities in volunteerism asking for support, and to expand the contacts of these organizations with their virtual plan. They were turned down. In a unique move, Merrill and Safrit approached chairpersons of local volunteer administrator networks from around the state and asked for a meeting in Columbus to pitch the idea. Six representatives from Toledo, Cleveland, Ravenna, Columbus, Cincinnati, and Dayton representing close to 700 members listened excitedly to the new vision of support and resources for the state. They also listened with apprehension. While it would be wonderful to create a contemporary, statewide, all-member, virtual organization comprised of the existing networks, there was apprehension about the work to be done. There was a need to build on the strengths of the metropolitan areas and their networks, while developing strategies for assisting more rural areas in creating their own local networks.

The representatives took the information back to their networks and asked for feedback. Of the six networks represented at that first meeting all responded positively. Representatives from these networks formed a Steering Committee, and developed bylaws and a mission statement for ONVA. ONVA's founding mission was to advocate and promote a culture that values and promotes volunteerism by developing the skills, knowledge, and aspirations of its professionals. It was to be an organization of professional networks with services provided through a Web site. Membership was gained through joining the local networks. It would act as a conduit for its professionals by collecting the voices of the membership and sharing them with the international Association of Volunteer Administration, from which it sought membership as an affiliate, as well as with the state legislature on relevant volunteerism issues.

Once incorporation was completed, the committee began work on benefits, expansion of representation, marketing and a financial plan. Face-to-face meetings were kept to a minimum, as a major purpose for forming ONVA was to promote the use of technology to better connect members within Ohio.

Meghan Kaskoun has been Volunteer Manager at the Aronoff Center for the Arts for 4 years, and in volunteer management for 11 years. Kaskoun co-chaired the efforts to bring the International Conference on Volunteer Administration to Cincinnati in October 2003. She has worked for 3 years to make Volunteer Ohio Network of Volunteer Administration (VONVA - www.vonva.org) a reality, and has been very active with the Cincinnati Association of Volunteer Administrators (CAVA).

Online chat sessions were a focused forum to deliberate, and they also offered an easy way to keep notes. Conference calls reduced the need for face-to-face meetings, and a listserv was established on YahooGroups to facilitate communication and storage of paperwork. Using Yahoo in this manner allowed the Steering Committee to see the benefits of the virtual arena, as well as the drawbacks, and they used this in creating a vision of what the ONVA Web site would look like.

The goal to have a self-sustaining virtual member organization meant a dues schedule was needed based on the number of members per organization. In exchange for these fees, member networks would have their own Web site linked off the main ONVA site, as well as the ability to see the training schedules offered by other member networks, network newsletters, bulletin boards, professional resources, legislative contacts, listings of networks and resources around the state, resources on how to start a network, and trainer recommendations. A benefit of membership in ONVA was the ability to attend any network's training at a member discount.

Once the schedule was finalized, and charter memberships established, an administrator was sought. The Ohio Association of Nonprofit Organizations (OANO) was approached for Web site and office management skills due to their strong ties to nonprofit executives, established legislative contacts and network within the state. After much work with and stated support from the executive director of OANO, the relationship was not sustained. The Steering Committee dwindled to five members after two-years of work, and now faced the challenge of continuing on in its work, or focusing again on their local concerns. From the beginning, the members of the Steering Committee recognized that individual work requirements limited their ability to devote ongoing time to run a statewide organization. Though face-to-face time was kept to a minimum through online meetings, there was an increasing need for someone to provide continuity and follow up. After much soul searching, the committee decided to contract with a part time webmaster and office administrator.

Before recruiting new networks as members, a basic working template of membership benefits was created. Nonprofitspace.org, which hosts other statewide networks of volunteer administrations, worked to create ONVA's vision—the Web site. As the Steering Committee continued to work on incorporation and tackled the daunting task of applying for 501(c)(3) status through the IRS, membership in the Steering Committee dropped as job setbacks and other life factors occurred. Yet membership in ONVA increased.

ONVA encountered a major obstacle when it was denied 501(c)(3) status by the IRS. Because the mission was focused heavily upon the education and development of professional volunteer mangers, the IRS considered the organization a membership association similar to a trade association. Tax status as a trade association was viewed as a major setback because it would seriously limit the ability of ONVA to apply for and receive grant funding. While appealing this IRS ruling, ONVA was approached by VOLUNTEER OHIO (VO) to consider a formal merger of the two organizations.

VO was formed in 1981 to increase the quality and quantity of volunteer services in the state of Ohio. VO had played a major role in promoting volunteerism in the 1980s and early 1990s and had founded Ohio's statewide conference on volunteerism. In 1992 VO brought together a diverse group of statewide service and volunteer organizations (Governor's Community Service Council, Campus Compact, Ohio Department of Education, Ohio Cooperative Extension, etc.) to develop a new collaborative statewide conference named Forging New Links. VO hired a conference planner to manage the conference and served as fiscal agent until 1998. VO languished in the late 1990s as other statewide organizations, such as the Governor's Community Service Council and the Statewide Association of Volunteer Centers grew and prospered.

In July of 2003 ONVA and VO formally merged. The new mission for VONVA is to serve as a catalyst to unify and strengthen volunteer efforts providing statewide leadership

in the areas of professional development, legislative advocacy and collaborative endeavors. The merger gives VONVA access to 501(c)(3) status, revitalizes VO's historical state network and places VONVA in position to assist with and be a major part of the annual statewide conference, thus giving managers of volunteers a great voice in conference planning. VO has annually sponsored a statewide awards program to honor excellence in volunteer administrator leadership. VONVA hopes to continue this tradition.

VONVA now boasts four active paying member networks: Portage County Volunteer Administrator Network (VAN), Columbus VAN, Cincinnati Association of Volunteer Administrators (CAVA), and DOVIA Akron. VONVA, and its member organizations are an affiliate AVA, and are helping to share skills and information with each other through the Web site: www.vonva.org. The Web site is still viewed as the major benefit of membership, as it continues to develop as a statewide hub for information and resources.

While there is much growth to occur, there has been much progress made and much for which to be proud. The Steering Committee of VONVA worked for years to establish a site, specifically geared towards volunteer administrators within Ohio, and that dream continues to evolve. The steadfast leadership and unwavering determination of a few people to promote volunteer administration has been key to overcoming the many obstacles encountered. A launch pad now exists from which professionals can begin their quest for knowledge, and collegiality with peers regionally and internationally.

POSTSCRIPT

Since this article was first written, VONVA has encountered dwindling interest and involvement from local member networks. As the leadership at the local level changes from year to year, it is difficult to sustain an ongoing link between the local groups and the statewide planning leaders. New local presidents have often not understood or embraced the VONVA vision. Increasingly there are questions of "What's in this for me?", as though the concept of "giving to receive" has completely escaped the managers of volunteer resources realm of understanding.

Though VONVA leadership has tried to share the importance of a collective presence and voice for the profession, VONVA finds itself being challenged for relevancy at the local level. Just as local networks often do not see the connection to AVA, they also do not see the immediate benefit of connection at the state level. Perhaps the leaders of VONVA have not done enough to build support and sustain engagement at the local level? Perhaps the immense pressures of life and work make it too hard for any all-volunteer group to prosper and flourish in contemporary society? Perhaps membership organizations, benefiting and actively sustained by members, are no longer seen as a viable tool for connection and movement? Perhaps there is no longer an interest in collective action (as suggested by Robert Putnam in *Bowling Alone*), and a growing interest in self-interest?

The founders of VONVA had hoped to call upon the tools of our modern age—technology—to build new horizontal links between professions in Ohio. A dedicated group of visionaries built a good foundation, but now find themselves pondering an old saying: "You can lead a horse to water, but you can't make him drink." The future of VONVA is in the hands of its members, as leaders alone cannot sustain a membership organization.

Building an Online Community

Whitney Quesenbery, Whitney Interactive Design

Why create online communities? Why put all that technology into something as fundamentally personal as volunteering—giving your time to improve a community? Let's ask the question a different way: why not?

Online communities can help solve some of the practical problems of holding a group together in these days of overloaded schedules, long working hours and even more complicated family lives. The rest of the world is using new technologies, so why not volunteer groups. But most importantly, they fit into the lives of many people today, and might be the bridge that will let you attract and keep younger volunteers.

I work in a high-tech field, so it was not surprising that my professional associations started using the Web and other online technologies early. But when my mother, a retired librarian, asked for my help so she could put the minutes of her library volunteer group online, and when my nephew's travelling soccer team started using an online calendar to keep track of their schedule and post pictures from their games, I knew these tools had gone from experimental to mainstream.

WHAT IS AN ONLINE COMMUNITY?

There are as many different flavors of online communities as there are types of volunteer groups. Some online communities have no counterpart in the "real world"—they are made up of people who meet and interact only online. Others are an extension of a real-world association, providing tools to help them work together better. Online communities serve many different purposes, and there are many different tools to meet each need. Some of the uses for an online community are:

- **To keep a large or small membership informed.**
  The online community may function primarily as a newsletter with periodic updates and articles. It might also be used to call for volunteers for specific events or to ask for action. This is a simple type of community, but one that uses many of the same tools as more complex versions and can be a stepping stone. This type of group relies on a signup form to allow members to "opt in" to the mailings, and software to send a single email to everyone on the list.

  Example:
  - The League of Women Voters sends informational emails on events in the news on specific topics to members who have signed up to receive them.

- **To allow members to express their opinions or discuss an issue.**
  These communities are often part of an informational Web site and function like a town meeting. Members can join in ongoing discussions, often divided into specific topics, or can respond to articles posted on the sites. They add a personal dimension to a Web site and are a great way to allow many different people to participate.

Whitney Quesenbery, Whitney Interactive Design, is a usability expert— someone who works with software companies to make their software and Web sites work better for real people. She is also a design process consultant, and highly regarded speaker. Her experience includes work for companies such as Novartis, Deloitte Consulting, Eli Lilly, McGraw Hill, Siemens, Hewlett-Packard, and Dow Jones. She has an active volunteer life, working with her alumni club to raise money for scholarships to Bryn Mawr College, on the board of Dogs in Service, and as a Director of the Usability Professionals' Association, www.wqusability.com.

Examples:

- WeightWatchers has a collection of discussion lists where members can act as a support group for each other.
- Boxes and Arrows (www.boxesandarrows.com), an online magazine, includes a feature for discussion of each article, sometimes resulting in very lively debates.

SOME OF THE TOOLS AVAILABLE INCLUDE:

- YahooGroups (groups.yahoo.com) and SmartGroups.com
  Free web services to set up a group with a calendar, files, pictures, voting, database, messages and classified ads.
- Communitye.net
  A bit daunting without a techie, but a powerful tool for online collaboration
- Topica.com
  Software to manage discussion forums
- Groove.net
  A collaboration workspace from the creator of Lotus Notes
- Evite.com
  A tool that just handles meeting invitations, including directions and other information that attendees need.

- **To provide a working team or affinity group with an email address**

  Managing a list of email addresses for more than a few people can be difficult. Groupware programs create a single email address for a team, and distribute all of the messages from that address to the people on the list. These lists are often the first step in creating a rich online community, and may have anywhere from two to thousands of members. Unlike regular email, these lists often provide archives of the discussion, which can be made public or be available only to current members.

  Examples:
  - The Society for Technical Communication creates discussion lists for each of their board committees. Members are added and removed from the lists by the office staff as they are appointed or leave the committee.
  - Many medical conditions have support groups where members can seek information, discuss developments in the field, share successes or just "vent."

- **To provide a working team with a "virtual office"**

  This use of online communities extends the email address concept, adding shared file storage, calendars, polling or voting, photo libraries, member profiles, and even online whiteboards. Most of these online communities are restricted to members-only, providing some of the same tools in the online community that they would have with a bricks-and-mortar office.

  Examples:
  - The Dogs in Service group uses a virtual office to maintain their calendar of pet assisted therapy visits, and to post forms that members need to fill out. Discussion features are also used to send emails to everyone in the group.

- **To allow a group to build an online information resource**

  If the group's aim is to create a new Web site, or some other body of information, there are tools to allow the members to edit a shared set of files. There are two kinds of software for this purpose. One is "content management" software that lets members or visitors add text or other material which is then published (sometimes after an editor has approved it). Another approach is exemplified by Macromedia's Contribute which lets the job of maintaining a Web site be divided among many people.

  Wikis (the name is short for "wikiwiki web"— "wikiwiki" means quick in Hawaiian) are one of the newer entries into the field, and one of the most unusual. Wikis work by allowing anyone visiting a web page within the wiki to change it, using just their browser. They are often used by people interested in a topic to collect information about it and share it with others.

  Examples:
  - The Wikipedia (http://www.wikipedia.org/) is an encyclopedia that has been built entirely by volunteers and now includes almost

150,000 entries.
- The IAWiki (http://www.iawiki.net/Iawiki) is a resource for the field of information architecture. It was built by a group of volunteers without a formal organization.

SETTING UP AND LAUNCHING A COMMUNITY

First Step: Planning

It's easy to get lost in the maze of different software tools. Each one offers different options, and does different things well. It's helpful to have a clear vision of your goals before you enter the maze and select a tool. Once you have made a choice and set up your community, it is difficult (though not impossible) to make a change.

There are a lot of good free services available on the Web, so you should start with them. The two most popular are YahooGroups and SmartGroups, so they are a good place to start. Some YahooGroups have been around for five years. Most of the free tools are based on advertising, so you have to consider whether this is appropriate for your group. For example, Web cam ads might not be appropriate for a school group. Luckily, there are also inexpensive tools available that get around this problem. In addition, there are the pricier tools that are really intended for large corporations, but which can also work for volunteer groups.

As you plan your online community, remember that technology is not a panacea. It can help solve problems by providing tools you may need, but it will not fundamentally change your group—at least not overnight. Consider the culture and activities of your group, and let the online community reflect these social patterns and needs.

Next: Set Up the Software

The process of setting up most of the online communities is relatively simple. Both SmartGroups and YahooGroups have a series of forms to guide you through the process. The actual work of setting up an online community has gotten very simple, so worries about the technology are no longer a reason to hesitate.

Before you start, be sure you have made a few important decisions about how the community will be run:

- Will the group be public (open to anyone) or private (open only to registered members)?
- Will new members need to be approved by a group leader?
- Will members be anonymous, or will their identity be visible to other members?
- Who will be able to send messages to the group: any member, or only group leaders?
- Who will be able to add events to the calendar, create a poll or use other features?
- What will the name (and address) of the online community be?

At Last: Up and Running

After all that work, you probably want to just sit back and watch your new online community take off. Unfortunately, communities don't just run themselves, and putting technology in place does not automatically make people use it. You need someone to encourage, guide and nurture the group as it gets familiar with the new tools. Not everyone will actively participate at first. Some will hang back and "lurk" while others will take the lead and become your trailblazers.

Here are some tips for running a successful community:

- Be supportive (technically)
  Not everyone is equally comfortable with technology. Be ready to help members who have problems or just need a little help getting started.
- Be supportive (socially)
  You and the moderators can help everyone get comfortable with the new community by acting as good hosts. Make introductions, start discussions, and watch for members who might need a little help or encouragement.
- Practice what you preach
  If you want the group to use the calendar, take the lead and use it yourself. People are more likely to follow if someone has already blazed the trail.

- Identify leaders
  Appoint a moderator or an advisory group to guide the group and extend or revise guidelines. In some groups, this is a rotating responsibility like any other volunteer position.
- Set rules
  Create guidelines to establish how the group will be run. Clearly identify unacceptable behavior, provide examples for good practices, and be prepared to quietly enforce them. There are many examples of good "netiquette" guidelines. An example can be found at http://www.stcsig.org/usability/activities/listfaq.html. A longer treatment, "The Core Rules of Netiquette" are excerpted from the book *Netiquette* by Virginia Shea and are online at http://www.albion.com/netiquette/corerules.html
- Know when to "take it offline"
  This might mean encouraging two members to continue a discussion by personal email or phone. It might mean knowing when to set up an in-person meeting or conference call instead of relying on the online community for everything, especially at the beginning.

Finally, don't be discouraged if the online community does not click right away. It takes time for people to get used to new ways of doing things. Keep trying and be prepared to let the group develop in its own way at its own speed. You might be pleasantly surprised by the benefits of setting up an online community: better (and faster) communication, and a whole new set of volunteers who are able to participate.

FURTHER READING:

"A Group Is Its Own Worst Enemy" by Clay Shirky. This article was a keynote speech at the O'Reilly Emerging Technology Conference on April 24, 2003, and was then published on the Web. Shirky talks about social software (or online communities) and some of the human issues he sees in their development. It has a technologist's perspective, but is a provocative read. http://shirky.com/writings/group_enemy.html

GUIDELINES FOR SUBMITTING MANUSCRIPTS

Content

The Journal of Volunteer Administration seeks to publish original manuscripts that provide for an exchange of ideas and sharing of knowledge and insights about volunteerism and volunteer management and administration. Manuscripts may focus on volunteering in any setting, in North America and internationally.

The Journal is a refereed publication of the Association for Volunteer Administration and expands and updates the research and knowledge base for professional volunteer administrators and other not-for-profit managers to improve their effectiveness. In addition, *The Journal* serves as a forum for emerging and contemporary issues affecting volunteerism and volunteer administration. *The Journal* is written, peer-reviewed, edited, and published by professional volunteer administrators, researchers, and consultants, sharing with their colleagues successful applications, original and applied research findings, scholarly opinions, educational resources, and challenges on issues of critical importance to volunteerism and the field of volunteer administration.

Manuscripts may be submitted at any time during the year. *The Journal* is published quarterly. Authors submitting manuscripts to *The Journal* must follow the guidelines in this document.
Submissions that deviate from these guidelines will be returned to the corresponding authors for changes.
Manuscripts must be submitted for one of five focus areas:

Feature Article (reviewed by three reviewers): Discusses applied concepts and research findings of particular interest and significance to volunteerism and volunteer administration both in North America and worldwide. Connects theory to practice and emphasizes implications for the profession. (Maximum length: 2,000-3,500 words, plus abstract, tables, and graphics.)

Research in Brief (reviewed by three reviewers): Summarizes basic and applied original research results of importance to volunteer administrators. (Maximum length: 1,000-2,000 words, plus abstract, tables, and graphics.)

Ideas That Work (reviewed by one reviewer): Describes novel ideas, training formats, innovative programs, and new methods of interest to volunteer administrators. (Maximum length: 1,500 words plus abstract, tables, and graphics.)

Tools of the Trade (reviewed by the editor): Reports on specific materials, books, and technologies useful to volunteer administrators. (Maximum length: 1,000 words plus abstract, tables, and graphics.)

Commentary (reviewed by the editor): Offers a challenge or presents a thought-provoking opinion on an issue of concern to volunteer administrators. Initiates discussion or debate by responding to a previously published *The Journal* article. (Maximum length: 1,500 words plus abstract.)

Manuscript Style and Preparation

1. Submit manuscripts as MicroSoft Word 5.0 for Windows or Word Perfect 5.2 or higher, 12-point type, Times New Roman font, double-spaced, 1.5 margins all round. May be submitted either by floppy disc (labeled with the author(s) names), or via e-mail.
2. All manuscripts must have a running head, which is an abbreviated title that is printed at the top of the pages of a published article to identify the article for readers. The head should be a maximum of 50 character, counting letters, punctuation, and spaces between words.
3. Manuscripts must have all identifying information removed. Include all author's name/s, affiliation/s, address/es, phone number/s and e-mail address/es on a separate cover page that will be removed for the review process.
4. Include a short (3-4 sentence) biography of each author.
5. Include an abstract of 150 words or less.

6. Double space everything: text, abstract, end notes, author's notes/acknowledgments, references, block quotations, appendices, AND tables.
7. References should be italicized, not underlined.
8. Left-justify everything with a ragged right-hand margin (no full justification).
9. Begin each required section on a separate page, and in this sequence: title page, abstract, text, appendix(es), notes, references, table/s, figure/s.
10. End notes are used for discursive purposes only. They should be grouped on a separate page. There are no footnotes.
11. All in-text citations are included in the reference list; all references have in-text citations.
12. Figures are camera ready; they appear exactly as they should in *The Journal*, except for sizing. Do not send glossies.
13. In all other aspects, follow the *Publication Manual of the American Psychological Association (APA)* (Fifth Edition, 2001).
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Review Process

Depending on the type, manuscripts will be reviewed by editor and/or editorial reviewers within six weeks of receipt. For Feature Articles, Research in Brief, and Tools of the Trade, the author(s) name(s) is/are removed for the review process. The author will be notified in writing of the outcome of the review process. *The Journal* retains the right to edit all manuscripts for mechanics and consistency.

If a manuscript is returned for major revisions and the author(s) rewrite(s) the manuscript, the second submission will be entered into the regular review process as a new manuscript.

Authors may be asked to submit a hard copy of the final version of an accepted article. It may be mailed or faxed, double-spaced, 1.5 margins all round, printed on one side of the paper only.

All authors of published manuscripts receive two complimentary issues of the *The Journal* in which his/her articles appeared.

2003 Recipients of *The Journal of Volunteer Administration* Award for Applied Research

Dollar Value of Volunteer Time—A Review of Five Estimation Methods, *Journal of Volunteer Administration*, Volume 21, No. 2, 2003
Authors: **Mary E. Zimmerer, PhD, CPA,** Professor of Business, Mesa State College, Grand Junction, Colorado, and **Paula M. Anderson, CVA,** Coordinator of Volunteer Services, City of Grand Junction, Grand Junction, Colorado

Acceptance Comments, October 16, 2003, International Conference on Volunteer Administration, Cincinnati, Ohio, USA.

Mary Zimmerer and I both are honored by this award for our research article published in this distinguished journal, and we regret that we could not join you here today.

Our interest is to further promote the profession of volunteer management by providing some tools for translating a dollar value for volunteer contributions. Our hope is that our colleagues will find them useful.

The subject matter was challenging, because formulas alone cannot relay the true magnitude of volunteer contributions to organizations whose goal is to make our world a better place. We know that the real impact of volunteers is not just about dollars.

In these times of rapid societal and economic change, we believe that appreciation and recognition of the value of volunteerism will continue to evolve. Hopefully, we've supplied a way of beginning that conversation.

Paula M. Anderson, CVA

The Journal of Volunteer Administration Award for Applied Research ($500.00 cash award) is selected annually from original applied research published within the year in *The Journal of Volunteer Administration.* Criteria for selection includes:

- Creativity, new/novel approach, new ideas for the field of volunteer administration;
- Clarity and style of writing. Finding supported by data/theory;
- Clearly defined relationship between the data/theory and application in the field. Conclusions lead to practical applications for volunteer administrators; and
- Importance of findings and conclusions to the volunteer administration profession. The research increases/expands the professional knowledge base of volunteer administration.

VIP'S

(Volunteering = In the People's Interest)

AN ENGINE FOR CHANGE

18th IAVE World Volunteer Conference 2004

August 17-21

Barcelona, Spain

http://www.federacio.net/en/

IAVE YOUTH FORUM

A Youth Forum will be held on August 17, to highlight the presence of international youth volunteers and IAVE members at the Conference. The goals of this forum are to present conclusions on volunteer youth work from around the world and to focus on the consequences and impacts of volunteer youth actions, especially on the Conference's three central themes:

1. Volunteerism in view of Cultural Diversity and Equal Opportunities;
2. Volunteerism's role in the process for creating conditions for Peace; and
3. Volunteerism's position in view of the challenge of Environmental and Social Sustainability.

For more information, contact the coordinator, Mr. Carlos Roca, by email youthiaveforum@federacio.net

Volonteurope 2004

www.volonteurope.org.uk

The 13th European Workshop on Voluntary Action will be held October 1-5, 2004 in the beautiful and ancient UNESCO World Heritage city of Dubrovnik.

With over 30 interactive workshops on a variety of themes focusing on the role of the voluntary sector in rebuilding communities, outstanding networking opportunities and a full day of visits to volunteering projects in local communities, Volonteurope 2004 promises to be a must-attend event.

Conference registration will include four nights' accommodation in the superb seaside setting of the Hotel Croatia, the warmth of the Adriatic welcome, delicious food and the chance to get to know one of the most fascinating and dramatic corners of Europe.

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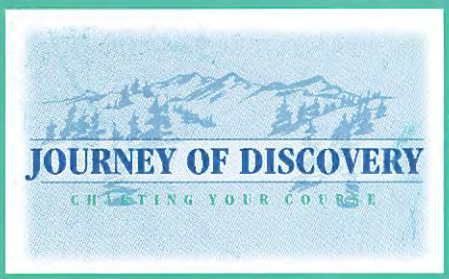

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